

# Social Investors vs. Donors

---

A DISTINCTION THAT MATTERS?

November 1, 2016



# Welcome!

To ensure a great webinar experience...

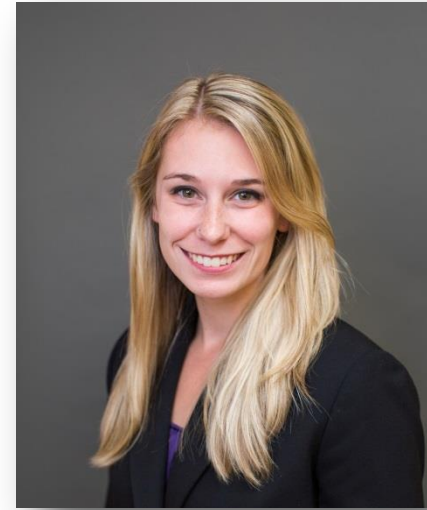
- Close all programs (other than GoTo Webinar) running on your computer
- Call in using a telephone instead of using your computer speakers
- Mute your phone
- If you experience visual issues, send us a chat. You may also contact GoTo Webinar at 800-263-6317

*Yes! This webinar, including the slides and audio, will be available for download on our website later today.*

# Who are we?



**James Plourde, CFRE**  
Vice President



**Andi Price**  
Associate Consultant

Don't forget to send us your questions by using the question pane on your control panel.  
If you experience any sound issues, please use the telephone option. If you still experience difficulties please call (800) 263-6317.

# Who are we?



**Larry Ettner, DM**  
Board Chair, Mercy Corps  
Northwest  
and Professor of  
Management Practice,  
Willamette University



**John Bianchi**  
Principal, Treadwell, LLC

Don't forget to send us your questions by using the question pane on your control panel.

If you experience any sound issues, please use the telephone option. If you still experience difficulties please call (800) 263-6317.

# What we will cover today

Key terms and definitions

Understanding social investors

Partnering with social investors

Stewarding social investors

How to get started in your organization



# Key Terms and Definitions

Donor

a person or entity that makes a gift

Investor

a person or entity that commits capital with the expectation of **financial** returns

Social Investor

a person or entity that makes a gift with the expectation of **social** returns

Impact Investor

a person or entity that commits capital with the expectation of **financial and social** returns



# Understanding Social Investors

In the PNW, they are likely to be data-competent

Very likely to have investment experience

Likely educated at an elite institution

Probably have a history of charitable giving



# What Makes Social Investors Unique

Since they have investment experience...

**they tend to**

make strategic financial decisions

As a result of their educational experience...

**they are probably**

part of a large social and professional network

Their history of charitable giving...

**indicates they are**

interested in social causes and aware of the role giving plays in social change





# Why Social Investors Matter

**They have the capacity and propensity to make transformational contributions**

**They are connected to a tight-knit and influential peer group**

Don't forget to send us your questions by using the question pane on your control panel.

If you experience any sound issues, please use the telephone option. If you still experience difficulties please call (800) 263-6317.



# Case for Transformational Giving

**Do you have a transformational case or program?**

The 10x rule

**What are the elements of a transformational case?**

Transform society; NOT your organization

You have the skills and expertise to realize the vision

**Are you engaging in visionary thinking?**



# The arc of a transformational case

10 years ago  Now  10 years hence

## Examples:

Genetic research  
Prison recidivism  
End of life care  
International relief



# Engaging with Social Investors

**What are you measuring?  
And for whom?**



# Measuring on the Board Level

**Legal Compliance**

**Overall Performance**

**Strategic Planning**



# Measuring on the Management Level

**Program Evaluation**

**Staff Reviews**

**Forecasting**



# Measuring on the Funder Level

**Community Needs**

**Program Inputs**

**Program Outcomes**



# Measuring on the Client Level

**Program Participation**

**Completion Rates**

**Long-term Outcomes**





# Stewarding Social Investors

Good data = good program management

Finding the “right” outcomes to measure

Educating donors about the value of these measures

Developing tools to track and document results

Regularly sharing progress with donors



# Stories from the Field

## Examples of:

Effective measurement

Strategies for sharing data with stakeholders

Partnerships with social investors



# How to Get Started

**1**

Identify the measures that are meaningful in your sector

**2**

Build a plan to track those outcomes

**3**

Develop your case for transformational giving



# Thanks for joining us!

---

## QUESTIONS & ANSWERS

Please submit any final questions by using the question pane on your control panel.



# Connect with us!



**James Plourde, CFRE**  
Vice President, Collins Group  
jamesp@collinsgroup.com



**Andi Price**  
Associate Consultant, Collins Group  
andreap@collinsgroup.com



**Larry Ettner, DM**  
Board Chair, Mercy Corps Northwest  
and Professor of Management,  
Willamette University  
lettner@willamette.edu



**John Bianchi**  
Principal, Treadwell, LLC  
john@treadwell.tv