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| **DEADLINE** | **TASK** |
| **Week 1** | 1.) Respond to SVP staff email to schedule Investment Team (IT) Orientation |
| **Week 2** | 1.) Review advance materials for IT Orientation |
| 2.) Attend Investment Team Orientation   * Discuss all materials * Prepare for first meeting with Prospective Investee, including determining individual roles & independently reviewing organizational materials |
| **Week 3** | 1.) Receive Prospective Investee financials and references from SVP staff |
| 2.) Begin analysis of financials; identify concerns/questions to discuss at next meeting with Prospective Investee; when answered, write analysis to include in final investment proposal |
| 3.) Hold first bi-weekly meeting with Prospective Investee to develop relationship and discuss investment / partnership proposal questions |
| **Week 4** | 1.) IT holds phone meeting (30 minutes) to debrief from meeting with Prospective Investee |
| 2.) Between meetings collaboratively write & edit proposal (between SVP & Prospective Investee); throughout apply / discuss SVP’s investment filters and criteria; share with SVP Vice President for review and feedback (prior to CIT/GST meeting) |
| **Week 5** | 1.) Schedule and begin reference calls for Prospective Investee |
| 2.) Review financials and continue analysis, identifying concerns/questions to discuss at next meeting with Prospective Investee; write analysis to include in final investment proposal |
| 3.) Hold second bi-weekly meeting with Prospective Investee to discuss investment / partnership proposal questions; continue relationship development |
| 4.) Meet with Capacity Investment Team (CIT) or Goal Strategy Team (GST) to share update on progress/direction, solicit feedback on direction of proposal (once or twice throughout process, likely weeks 5 & 9) |
| **Week 6** | 1.) IT holds phone meeting (30 minutes) to debrief from meeting with Prospective Investee Meet with prospective Lead Partner (if NOT on investment team) to share historical context & transition from IT to ongoing SVP investment |
| 2.) Between meetings collaboratively write & edit proposal (between SVP & Prospective Investee); throughout apply / discuss SVP’s investment filters and criteria; Direct questions and seek input from SVP VP as needed |
| **Week 7** | 1.) Complete reference calls; use information/learnings to inform questions at next meeting with Prospective Investee; integrate learnings/insights as appropriate into final investment proposal |
| 2.) Finalize and resolve financial analysis process |
| 3.) Hold third bi-weekly meeting with Prospective Investee to discuss investment / partnership proposal questions |
| **Week 8** | 1.) IT holds phone meeting (30 minutes) to debrief from meeting with Prospective Investee Meet with prospective Lead Partner (if NOT on investment team) to share historical context & transition from IT to ongoing SVP investment |
| 2.) Between meetings collaboratively write & edit proposal (between SVP & Prospective Investee); throughout apply / discuss SVP’s investment filters and criteria; share with SVP Vice President for review and feedback (prior to CIT/GST meeting) |
| **Week 9** | 1.) Hold fourth and (likely) final bi-weekly meeting with Prospective Investee as well as the organization’s Executive Director, Board Chair, and SVP Vice President |
| 2.) Meet with CIT/GST to share update on progress/direction, solicit feedback on direction of proposal (once or twice throughout process, likely weeks 5 & 9) |
| **Week 10** | 1.) IT holds phone meeting (30 minutes) to debrief from meeting with Prospective Investee |
| **Week 11** | 1.) Complete investment proposal, integrating reference call insights & financial analysis, and Scoring Tool |
| 2.) Prepare for CIT/CST presentation (develop PowerPoint overview; determine roles) |
| 3.) Send final investment proposal & completed scoring tool to CIT/GST in advance of meeting |
| **Week 12** | 1.) Present recommendation at CIT/GST meeting |
| **Next Steps** | 1.) If investment is made, meet with prospective Lead Partner (if NOT on investment team) to share historical context & transition from IT to ongoing SVP investment |
| 2.) Share feedback on Investment Team process, timeline, tools, etc. with SVP staff to drive continuous improvement |
| OPTIONAL: Celebrate IT work with team members and SVP staff; share |

**Capacity Investment Team Meeting Dates:**

<INSERT DATES>