

Social Venture Partners Portland

Investment Team Process Map

Please note that the following dates are estimations and do not always reflect the length of the investment process

Week 1

Investment Team (IT) is launched

Week 2

IT Onboarding Meeting (90 minutes) Week 3

Receive Investee financials & references

IT/Investee Meeting (90 minutes) Week 4

IT Phone Meeting (30 minutes)

Week 8

IT Phone Meeting (30 minutes) Week 7

Reference calls complete

Financial analysis resolved

IT/Investee Meeting (90 minutes) Week 6

IT Phone Meeting (30 minutes) Week 5

Schedule & complete reference calls

Review financials

IT/Investee Meeting (90 minutes)

Week 9

IT/Investee Meeting w/ ED and Board Chair (90 minutes) Week 10

IT Phone Meeting (30 minutes) Week 11

Finalize investment proposal

Prep for presentation & send finalized proposal to Capacity Investment Team (CIT) or Goal Strategy Team (GST) **Week 12**

Present recommendation at CIT/GST meeting