

# Client Logo Here

## Executive Certificate on Impact Investing

### Day One

Schedule and Timing	Description	Location
8:00 – 9:00 AM	<b>Breakfast</b>	SCU Facilities
9:00 – 9:30 AM	<b>WELCOME INTRODUCTIONS &amp; PROGRAM FORMAT</b>	SCU Facilities
9:30 – 10:50 AM	<b>Module 1: THEORY OF CHANGE</b> Utilizing market mechanisms to build positive social and environmental impact 1.1 Why impact invest? What is impact investing? 1.2 Arc of the story- recent developments	SCU Facilities
10:50 - 11:00 AM	<b>BREAK</b>	SCU Facilities
11:00 AM - 12:20 PM	1.3 Survey: Families and impact investing 1.4 Sharing journeys: the stories of other impact investing families 1.5 Resources for an impact investor	SCU Facilities
12:20 - 1:30 PM	<b>Lunch provided</b> No formal activities scheduled. Time to review emails and enjoy lunch conversations and networking with your colleagues.	SCU Facilities
1:30 – 2:05 PM	<b>Module 2: A VALUE CENTRIC INVESTMENT STRATEGY</b> Filling out your impact investment policy primer: 2.1 What are your values and investment objectives? 2.2 What are your impact themes? (your domain of change) 2.3 What is your AUM allocation to impact investing (your change enablers) 2.4 Defining impact: How do you measure	SCU Facilities
2:05 PM - 2:30 PM	<b>Module 3: Target Asset Allocation Policy</b> Excel Workbook and in-class sharing session addressing: 3.1 What is your Target Asset Allocation % across asset classes?	SCU Facilities
2:30 PM - 2:40 PM	<b>BREAK</b>	SCU Facilities
2:40 PM – 3:30 PM	<b>Module 4: Constructing an Impact Investing Portfolio</b> Map out your impact investing policy -- Primer Examine sample investment profiles and prospectus 4.1 Overview of Investment Options by Asset Classes 4.2 Light - Touch Engagements: investing with cash and fixed income	SCU Facilities
3:45 PM - 5:30 PM	<b>Welcome Reception</b>	Adobe Lodge

# Client Logo Here

## Executive Certificate on Impact Investing

### Day Two

Schedule and Timing	Description	Location
8:30 – 9:30 AM	<b>Breakfast &amp; Discussion Groups</b>	SCU Facilities
9:30 AM – 12:30 PM  <b>Facilitator:</b>  <i>Break: 10:15 – 10:45 AM</i>	<b>Module 4: Sourcing Investments</b>  4.2 Light- touch engagements: investing with public equities 4.3 Moderate personal engagements: investing with structured notes funds, private equity funds, real asset/estate funds 4.4 High- Touch Engagements: direct private equity and real asset/estate investments - Sourcing deals	SCU Facilities
12:30 - 1:30 PM	<b>Lunch provided</b>  No formal activities scheduled. Time to review emails and enjoy lunch conversations and networking with your colleagues.	SCU Facilities
1:30 – 2:30 PM  <b>Facilitator:</b>	<b>Resume</b>  4.4 High- Touch Engagements: direct private equity and real asset/estate investments - Due diligence - structuring deal - Valuation	SCU Facilities
2: 30 PM - 2:40 PM	<b>BREAK</b>	SCU Facilities
2:40 PM – 3:00 PM	<b>Resume (Continued)</b>  4.4 High- Touch Engagements: direct private equity and real asset/estate investments - Documentation	SCU Facilities

# Client Logo Here

## Executive Certificate on Impact Investing

### Day Three

Schedule and Timing	Description	Location
8:00 – 9:00 AM Pre-Program	<b>Breakfast &amp; Briefing</b>	SCU Facilities
9:00 AM - 10:30 AM	<b>Module 5: Measuring Impact</b> <ul style="list-style-type: none"><li>- Challenges in the field</li><li>- Output, outcome, impact framework</li><li>- Application to fund and direct investments</li></ul>	SCU Facilities
10:30 AM - 10:40 AM	<b>BREAK</b>	SCU Facilities
10:40 AM – 12:00 PM	<b>Module 6: Post Investment Support</b> <ul style="list-style-type: none"><li>- What happens after you make a direct investment</li><li>- Tales from the field</li></ul>	SCU Facilities
12:00 PM - 1:00 PM	<b>Lunch provided</b>  No formal activities scheduled. Time to review emails and enjoy lunch conversations and networking with your colleagues.	SCU Facilities
1:00 PM - 2:00 PM	<b>Module 7: Taking Action</b> <ul style="list-style-type: none"><li>- What have you learned?</li><li>- How have you planned to use this course?</li><li>- Revist Impact investing policy and excel allocation strategy?</li></ul>	SCU Facilities
3:30 PM - 6:30 PM	<b>Wine &amp; Cheese Reception</b>	Adobe Lodge

**SILICON VALLEY EXECUTIVE CENTER**  
**Leavey School of Business**  
**Santa Clara University**