**12.1 Funding Sources and Amounts**

Identify the funding sources you plan to pursue, the amount requested, and when the funding will be needed.

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| --- | --- | --- |
| **Source** | **Amount** | **Date Required / Awarded** |
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**12.2 Elevator Pitch**

Create an outline that addresses these points:

* What your organization does. (What are your products or services?)
* Who the intended beneficiaries are. (Who benefits from your products or services?)
* If different from the beneficiary, who the economic buyer is. (Who pays for your products or services?)
* Why your organization’s product or service is important to the beneficiaries. (How, specifically, are the beneficiaries’ situations improved?)
* Why the organization is the best at what it does. (Why are you a better choice than the alternatives?)
* How the organization measures what it does. (What metrics do you use to know if you are successful?)

Use the outline to write your 2-3 minute description of your organization and what it does.

**12.3 Business Plan Summary Presentation**

See PowerPoint template for Lesson 9.3.

**12.4 Investment Profile**

Complete the following worksheet. Data will be used to populate your Investment Profile.

1. Please provide the full name (and abbreviation/acronym if you use one) for your organization. If you are representing a single project or department in your organization please identify that project or department.

1. Please list the name and title of the social entrepreneur completing GSBI Online. If this person is not the founder or chief executive, please list them as well.

1. Please provide your:
   1. Email address:
   2. Website url (if any):
   3. Phone number:
   4. Twitter, Facebook, YouTube, or other urls (if any):
2. In what year was this organization (or project) established?

1. What is your organization’s form of doing business?

Non-profit/NGO

For-Profit

Government

Hybrid (you have both for-profit and non-profit organizations)

Other (please specify):

1. What is your 10-word Mission Statement? (You can copy or revise Lesson 1.)

1. Please list the city (cities) and country (countries) where you do business (have beneficiaries). If there are no cities, just list the countries and regions. Also identify where your headquarters are located.

1. In which sectors do you have impact (choose a maximum of two):

Agriculture & Fishing

Clean Tech & Energy

Economic Development

Education

Environment

Fair Trade

Health

Equality & Social Justice

Housing

Information & Communications Technology (ICT)

Microfinance

Transportation

Water & Sanitation

Other (please specify):

1. How many employees do you have (full time equivalents)?

1. How many volunteers (full or part time) do you have at any one time?

1. What is your annual budget for this year (total of all expense drivers)? (You can copy or revise Lesson 6.)

1. What are your major income sources (total of all income drivers), and what will be your total income? (You can copy or revise Lesson 6.)

1. What were the major sources of your initial funding? If you have investors, please list them and the percentage of investment for each. If you have loans, please list the lenders and the percentages of your loans held by each.

1. Please list major awards you have received and give the year in which you received the award.

1. What is your Value Proposition? (You can copy or revise Lesson 6.)

1. Please describe the Target Market for your organization. Be sure to include the size of the total available market. (You can copy or revise Lesson 3.)

1. Please provide a short description that illustrates your product or service. If you have a technical innovation, please describe it as well.

1. Give a one-sentence statement that quantifies the impact of your organization in terms of one quantitative metric (e.g., “we have provided jobs for 1,000 youth,” or “we provide health care products to over 100,000 women,” or “built 10,000 earthquake resistant homes which house over 60,000 people.”

1. Please list the 3-5 most significant growth milestones you have achieved (funding, income, impact, or growth of beneficiaries). Provide the dates and values (e.g. amounts, numbers) for each milestone (e.g. 2008: obtained $250K funding; 2009: opened 3 regional training centers; 2010: trained 500 youth).

1. Please list your 3-5 most significant, quantitative, growth goals for the next 3 years (e.g. 2012: Build 12 village power systems, 2013: build 18 village power systems, 2014: build 24 village power systems).

1. Please provide 1-3 quantitative metrics of the impact of your organization/project since its inception (i.e. what has been the total impact). One of these metrics should be the total number of people who have benefited from your organization/project and an explanation of how you calculate that number.

1. Please provide a quote from one of your beneficiaries that can illustrate the impact of your organization on you beneficiaries’ lives.

1. Briefly describe the type of investments the organization is seeking (grants, public-private partnership subsidy, debt, convertible debt, equity), the required amounts, and investment timeframe (you can revise Lesson 9.1). If a monetary investment is not being sought at this time, describe other types of support that are being sought, such as partnerships and technical assistance.

1. Please provide as many of the following images as possible. List URLs or attach files in .jpg, .jpeg, gif, or .png formats:
   1. Logo

* 1. Headshot photo of you

* 1. Photo or diagram that illustrates your Value Proposition

* 1. Photo of some of your beneficiaries

* 1. Diagram or picture that illustrates your product or service, and if applicable, the technical innovation

* 1. Up to 5 additional photos or diagrams that illustrate the organization’s work and the local context