

Social Investment Fundamentals

Equip your teams to establish, implement, manage, and report on impact for best in class social investment portfolios



Develop impactful social investment portfolios

We have designed and implemented programs that place sustainability at the core of client operations, including projects that focus on:

Localization of supply chains

Circularity and waste management

Women's economic empowerment

Worker and community health

Climate mitigation and adaptation

Youth skills and empowerment

Access to green and inclusive financial services

Innovation and entrepreneurship

The new frontier of what it means to be a responsible business requires companies to drive meaningful impact and local prosperity in the communities and environments where they operate. We help our clients move beyond regulatory compliance to position themselves as leaders in responsible business with enduring social licences to operate and market.



Best-in-class 1-day social investment training for your teams

Leveraging design thinking principles, we provide an immersive experience for company teams, their suppliers, and partners to build capability and confidence in navigating the spectrum of activities required to develop world class impactful social investment portfolios.



Participants are equipped to develop contemporary social investment programming and tie it meaningfully to their core business. We cover the phases of building a successful portfolio, including designing, establishing and action planning for implementation of new initiatives. We incorporate DAI case studies to offer a practical and localized approach. **Participants are trained to:**

Build long term stakeholder value creation

Align social investment functions with core business

Foster team alignment and cohesion around purpose, vision, and strategy

Optimize impact measurement, management, and reporting

Modernize approaches to sustainably fund program portfolios

Unlock sustainable portfolio impact

Participants come from a variety of in-house teams

The course is intended for multiple teams that play a role in shaping a social investment portfolio. During the course, participants align expectations, clarify their strategy, and exchange practical experiences. Participants will generate outputs from the workshop that they can apply to their planning.



Social performance
and social investment



Sustainability
and ESG



Corporate communications
and external affairs



Procurement
and supply chain



Community engagement
and development



Diversity equity
and inclusion

Course modules

I. Social Investment Design Fundamentals and Framework

- Pinpointing suitable themes aligned with global/regional core business and ESG strategies, and tailoring initiative ideas to local contexts
- Selecting from a range of intervention modalities and approaches for maximal impact, including sustainable exit strategies

II. Multistakeholder Engagement & Management Approaches

- Materiality assessment approaches
- Stakeholder mapping and identification and measure of stakeholder relationships and influence
- Practical stakeholder engagement planning

III. Portfolio Management and Legacy Building

- Adaptive management approaches
- Co-investment/partnership building strategies
- Portfolio/initiative vision of success
- Designing flagship initiatives

IV. Impact Management, Measurement and Reporting

- Understanding of theories of change, logical frameworks, and results chains
- Exploring data collection methods, tools and practices
- Establishing key performance indicators and measurement platforms/frameworks

V. Action Planning

- 'Next steps' road mapping
- Planning interventions across phases: inception, implementation, incl. impact management, measurement, reporting and intervention exits

Lead trainers

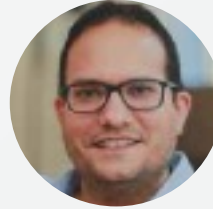


Bhairav Raja

Director, Responsible Business
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Bhairav is a trusted advisor to multinational corporations, philanthropies, and governments with a footprint in emerging and frontier economies. He has designed solutions that promote access to green and responsible financial services, brokered natural capital solutions that benefit local communities and small businesses, and guided digital and climate innovation in agribusiness and renewable energy value chains.

He is a lead advisor on corporate social investment strategies and policy instruments for regulators and government bodies, including the European Commission. Bhairav is an accomplished trainer and facilitator and a frequent speaker on responsible business themes, including the circular economy and community inclusive net zero/carbon reduction solutions.

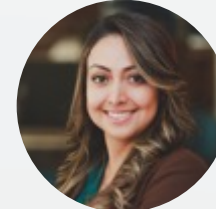


Zaki Raheem

Director
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Zaki has designed best-in-class social investment programs that promote the development of inclusive supply chains in Africa, Asia, and Latin America. He has unlocked innovation and entrepreneurship solutions, built the capacity of SMEs, and facilitated start-up training in cleantech, agribusiness, and women's economic empowerment.

He is a trusted advisor to a range of flagship initiatives, including an agri-tech business innovation centre in Ghana, a women's accelerator in Guyana, and corporate philanthropy funded refugee livelihoods program in Uganda. Zaki is an adjunct associate professor at Columbia University's Graduate School of International and Public Affairs.



Belem Saucedo

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Belem's recent experience focuses on leading a corporate social investment program for entrepreneurs and trainers active in 20 countries, focusing on innovation, acceleration programs. She created content and delivered short courses and workshops for SMEs and the labor force in the clean energy sector in Mexico.

Belem specializes in women's empowerment and social inclusion. She manages a large scale program on digitalisation of financial institutions and SMEs in the Caribbean. She previously served as a Field Coordinator for the World Bank, managing impact evaluations.

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Learn more about DAI Sustainable Business Group at

<https://www.dai.com/sbg>

Founded in 1970, DAI is an employee-owned international development company that designs and implements social, environmental and economic development programs for international development agencies, corporations, governments, and philanthropies. The Sustainable Business Group helps corporations position sustainability as a driver of growth through; strategy and full life-cycle advisory, project implementation, impact management, and reporting.