

**TRANSFORM FINANCE** envisions a world where capital is driven by social justice values and is accessible to activists and community leaders as a tool for transformative social change.

We hold that investment practice, to be transformative, should center communities in design, governance, and ownership; add more value than it extracts, and fairly balance risks and returns between all stakeholders.

## OUR WORK

### WITH COMMUNITIES

We empower activists and community leaders to shape how capital affect them – both in terms of holding capital accountable and having a say in its deployment – by demystifying finance and building capacity for community-centered initiatives.

### WITH INVESTORS

We support investors committed to deepening their impact investment practice to adopt more transformative approaches. We demonstrate the viability of such approaches via education, concrete tools and strategies, and overall guidance.

### BUILDING A BRIDGE

We foster a new discourse and collaboration between previously disconnected stakeholders – investors and social justice practitioners – by facilitating dialogue, breaking down barriers of knowledge and values, and building cross-stakeholder strategies. and.

### EMPOWERING COMMUNITY LEADERS

Our programs with grassroots leaders seek to reclaim a seat at the table for those historically excluded from decisions about capital. To do so, we train organizations on the inner workings of the financial system, highlight potential areas of engagement, facilitate partnerships with financial experts to launch campaigns and initiatives that influence capital, and support the creation of financial vehicles that serve the needs of communities – from democratic loan funds to investment vehicles that capitalize multi-stakeholder enterprises.



### INFORMING AND SUPPORTING INVESTORS

Our programs with investors seek to create a social justice approach to investing and move the investment field increasingly deeper into that approach. We do this by providing analysis for how investments affect issues in social justice, developing concepts for more transformative alternatives to traditional fund and investment models, delivering technical support for investors who are in a position to adopt such models, and convening a community of practice via the Transform Finance Investor Network.

### BUILDING A CROSS-STAKEHOLDER MOVEMENT

We undertake our programs with an intention to create a bridge between the separate worlds of finance and social justice. By working with communities, we gain a perspective that in turn supports our work with investors: how those affected view capital flows, what the priorities of communities are, what a vision of a non-extractive finance landscape looks like. By working with investors, we can help social justice leaders find windows of opportunity for their voices to be heard and for them to develop transformative alternatives from the ground up. Working with both groups and creating new spaces for cross-dialogue, we have been successful in fostering collaboration between previously disconnected stakeholders.

## STRATEGY AREAS

### RESEARCHING THE SOCIAL JUSTICE IMPLICATIONS OF INVESTMENTS

Our research programs analyze the role of capital in society and how it affects all issues of social justice. This research informs what models to advocate to investors and what strategies community leaders can use to influence capital around those issues.

**Program Example:** Analyzing the racial justice implications of investments across all asset classes, to be used in a report providing recommendations for asset owners.

### EXPANDING THE INVESTOR'S TOOLBOX FOR SOCIAL JUSTICE

We identify and, when they don't exist, generate fund concepts, investment frameworks, deal structures, and governance models that drive social justice. We then lift up these tools within our investor audience via reports, webinars, and speaking engagements.

**Program Example:** Writing a report on a new investment fund model that creates employee owned businesses while adhering to rigorous impact guardrails.

### HELPING INVESTORS IMPLEMENT NEW STRATEGIES

We work directly with asset owners and fund managers to adopt new tools and strategies through tailored advisory services, pipeline development, impact assessment, and workshops that all provide proof of concepts for the field.

**Program Example:** Working with a major foundation's investment team to understand alternatives to predatory lending practices and shift investments towards those options.

### DEMOCRATIZING KNOWLEDGE OF CAPITAL

Our trainings help social justice leaders and grassroots organizations at both national and local levels understand how capital affects their work, provide critical knowledge on the potential engagement strategies, and connect participants to aligned finance players.

**Program Example:** Delivering a series of trainings in 6 US cities in 2019 that develop place-based infrastructure among local leaders and investors to change capital flows.

### BUILDING GRASSROOTS ENGAGEMENT WITH CAPITAL

We help movement building organizations develop new, concrete campaigns that influence capital at the systemic level, generate more allies within the investment space, and demonstrate the ability to generate social change leveraging the world of finance.

**Program Example:** The 2019 Transform Finance Cohort brings together 6 worker justice organizations over 10 months to launch new, untested programs that influence capital.

## ENGAGE WITH US

Now, more than ever, we see that activists, investors, and everyone in between are searching for more impactful engagements with finance for social justice. Given the need to build partnerships, provide tools, and build capacity across these stakeholders, we are always eager to discuss how you can play a role in a more transformative vision of finance.

Whether you are a foundation seeking to align your endowment with social justice, a fund manager seeking to go deeper in a particular impact area but lacking the framework for doing so, or a grassroots movement organization seeking to understand the barriers to social justice work that capital creates, please reach out at [info@transformfinance.org](mailto:info@transformfinance.org).

