**Impact Investing Request for Proposal Questions**

Organizational

1. Year the organization was established.
2. Number of employees
3. Biographies of those who will work on the project.
4. Size of total organization portfolio in terms of both assets and number of deals.
5. Largest deal and smallest deal in last 3 years.
6. What percentage of the total portfolio are equity investments?
7. Representative list of current lenders/investors with your organization.
8. Has the organization incurred any regulatory fines, citations, or cautionary comments in the last 5 years? If so please explain.
9. Explain the nature of your liability insurance coverage and the coverage amount.
10. Please provide a copy of your last 3 years audited financial statements.
11. Does your organization have a particular emphasis or specialty regarding the type of projects undertaken or the area supported (business development, housing, environment, education, etc.)?
12. What are your fees? Do they vary by type of project/engagement?

Process

1. Describe the amount in assets and number of deals done in [*Fulton County*] during the last 3 years.
2. Describe your deal sourcing procedures in [*Fulton County*]. If you haven’t done prior deals in [*Fulton County*] describe the anticipated sourcing process.
3. Briefly describe your lending evaluation process and the average time for said approval.
4. If you’ve done prior equity investments, describe the exit strategy employed for eventual return of principal.
5. Describe what government, NGOs or private entities your organization would envision partnering with so as to leverage investment dollars.
6. Currently, what percentage (in terms of both assets and deals) are 90 days or more past due in their repayment terms?
7. List and very briefly describe the deals that either defaulted or required restructuring during the last 3 years.
8. What is your expertise working with community foundations vs. private foundations? Do you see opportunities or challenges in working with a community foundation?

Revenue & Return

1. What is the range of returns provided to lenders/investors in your organization during the last 3 years?
2. Please explain the basis for said differences.
3. How have returns, loan terms, etc., changed over the past three years based on your learnings from previous loans?