The Social Sector Franchise innovations Roundtable (SSFIR) will be a two-day conference Tuesday September 27 and Wednesday September 28 at the University of New Hampshire in Durham, NH. The theme for this year’s Roundtable will be Building Common Ground and Understanding for Scaling Social Sector Franchising. The focus for the meeting will be at two levels.

1. **Sector Level:** An opening panel of social investor and donors will look at the higher-level challenge of growing the field of social sector franchising and what can be done to get more resources behind actually scaling proven social businesses. A panel at the end of the first day will focus on developing the Social Sector Franchise ecosystem with speakers who have been involved in building other social benefit sectors such as social entrepreneurship, microfinance and from the commercial franchise industry who can speak from their perspective on how to professionalize and spread franchise know how.

2. **Enterprise Level:** We will also look deeply at three specific social sector franchises, which will be subjects of a Social Sector Franchise Accelerator process during the second day of the conference. The SSF subjects will represent a range of approaches and organizational maturity and, working in diverse teams, we will get into the nuts and bolts of these enterprises to assess their scalability, look at what needs to happen to link them to financing; advise them on developing an expansion strategy, and evaluating their impact and success. By the end of the day a concrete action plan will emerge which will be supported with mentors (maybe recruited from the IFA’s Social Sector Task Force Mentoring program) as they implement the action plans and will be followed through a Living Case Study action learning process as they encounter challenges and make progress.

**Tuesday September 27**

9:00 – 9:15  
**Review of the Roundtable Agenda and Welcome**  
*Fiona Wilson, Deborah Merrill-Sands, Michael Ettlinger, introduction of keynote speaker by Bill Maddocks*  

9:15 - 10:00  
**Opening keynote address and Q & A**  
*Keynote speaker Ella Gudwin, President of VisionSpring*  
Dr. Gudwin is President of VisionSpring, an international social enterprise creating access to affordable eyewear in emerging and frontier markets. She heads up global operations that are accelerating the uptake of eyeglasses among consumers who earn less than $4 per day as a means to improve income earning potential, academic achievement, and quality of life.

10:00 – 10:15  
**Brief Introductions of participants - names, organizational affiliations**
10:15 – 10:30  Coffee/tea break

10:30 – 12:00  Financing Social Sector Franchising: Risks, Innovation and Breakthroughs

*Moderator Michael Swack, Center for Impact Finance/UNH, Panelists: Randy Welsch, Co-founder and investor Jibu, Ambassador John Simon TOTAL Impact Capital, Marguerite Farrell, Private Sector Health Team Leader, GH/PRH/SDI, USAID.*

What are the barriers to investment in SSFs, what can we do to match prospective investors with investment ready projects, how can we move projects from nearly ready to ready, what is the profile of current investors in SSFs and how did they get there. What kind of investors invest in early stage expansion of social businesses that have been successfully “incubated” or “accelerated” (e.g. via well-known accelerators)? What other types of capital might be available for early stage expansion? At what stage of expansion would impact investors be willing to invest? What assurances do they need to take the leap? How can we, as a group, provide those reassurances? (e.g., by creating some sort of rating system based on process indicators?) How can social franchises develop social metrics that are in line with other social metrics that impact investors are seeing in their other investments?

12:00 – 12:45  Lunch

12:45 – 1:45  Social Sector Franchising from a Health Impact Perspective


The global health sector has been using elements of the franchise model for more than twenty years to expand access to quality health care. In recent years, the push toward increasing financial sustainability has led many organizations to rethink how they use the model to align more closely with the commercial sector so that the system is able to deliver both financial and health impact results. In this panel, health care franchise implementers will share how they are progressing on their work to create more commercially viable health care franchises in low-income countries.

1:45-3:15  Living Case Study Accelerator Social Sector Franchiser Presentations - Part One

Each case subject SSF founder/CEO will have about 25 minutes for their presentation description by the with another 20 minutes for questions, answers and discussion. The LCS franchisers will be invited to make detailed presentations, which will be followed by questions and discussion. Presentations will briefly describe the origins, staffing, management structure, franchising product or service, financial model, funding and investor profile, franchisee profile, training and support for franchisees, quality and compliance, current management issues and projections for growth and capitalization. Then the key issues or “pain points” which will be the focus of the second day exercise will be described in summary. Case profiles will be sent out in advance to participants. The
The goal the presentations are to give roundtable participants a clear picture of the franchise, its challenges and opportunities to prepare for the solutions iteration accelerator process on the next day.

3:15 – 3:30 Coffee break

3:30 – 4:30 Living Case Study Accelerator Social Sector Franchiser Presentations - Part Two (Case Three) and preparation for the Social Sector Franchise Solutions Iteration Accelerator process the next day

4:30 – 5:45 Developing the Social Sector Franchise Ecosystem: Where Are We Going and Are We Ready?

Moderator Kim Wilson, Tufts University, Panelists: Kim Alter, Virtue Ventures, Deborah Burand NYU, Dr. Ella Gudwin, VisionSpring, Josh Merin, IFA

The Social Sector Franchise field has grown rapidly over the past several years echoing the expansion of social enterprise domain globally. While relatively new to social franchising, accelerators, incubators and other dynamic forms of business support are launching a new generation of social sector franchises that have figured out how to apply the best practices of business format franchising to their enterprises. This means greater efficiency and scale and possibly greater impact.

Drawing examples from the fields of microfinance, social business, and commercial franchising, this session explores opportunities for building a well-connected and strong ecosystem capable of supporting the growth of a new and robust field of social sector franchising. Ecosystem components under consideration include financial, academic, and business support that cut across a wide range of industries (e.g. health, agriculture, water, sanitation, education, etc.)

Panelists will share specific ideas and insights based on their experience and expertise in field building and strengthening.

5:45 – 6:30 Pre-dinner Break

6:30 – 8:00 Evening Keynote and Dinner
Dr. Aristotle Alip, founder of CARD Mutually Reinforcing Institutions the largest microfinance and microinsurance organization in Southeast Asia. CARD is the sponsor of Hapinoy a leading women owned chain of convenience stores in the Philippines.

Wednesday September 28

8:00 – 8:30 Coffee

8:30 – 8:45 Introduction of the Social Sector Franchise Solutions Iteration Accelerator Process

8:45 – 1:00 Accelerator Exercise with working lunch (buffet available from 12:00 – 12:45).
On the second day the roundtable participants will be break into three groups, one for each LCS franchiser, to work through a solutions iteration accelerator process that will have as its end result an action plan for moving the franchise forward. The action plan will identity possible strategies for solving key constraints, attracting financing, resolving management dilemmas etc. The action plan will guide the mentoring relationship between the IFA mentor and the LCS franchiser.

The three LCS franchisers have unique issues: e.g. distribution challenges, network creation, financing etc. at different stages of development with challenges that will be the subject of the ideation and problem solving of the day. Three teams of participants will be formed based on individual backgrounds and what each can contribute to create solutions to the subject’s problems. We will select with the goal of having a diversity of skills and background on each team.

1:00 – 1:45 Each team will have 15 minutes to report back on the action plan created.

1:45 – 2:00 Next Steps and Wrap Up