

From: Soura, Christian
To: Joe Waters jwaters@instituteforchildsuccess.org
Date: 3/18/2013 12:45:51 AM
Subject: RE: SIB stuff

I'm still looking at the schedule...do you have any additional info on the April 18th event? For instance, what's the format? Is it a solo presentation you're looking for, or would I be serving as a panelist? If it's the former, how much time would you want me to fill? Is there a draft agenda for the date at this point? Thanks.

CLS

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From: Joe Waters [jwaters@instituteforchildsuccess.org]
Sent: Monday, March 11, 2013 2:10 PM
To: Soura, Christian
Subject: SIB stuff

Dear Christian:

Hope you had a nice weekend. Just a few things on SIBs:

1. Spoke with George Overholser last week at Third Sector. Very interested in South Carolina. Also, he was hearing rumors in SIB-land that SC was successful on the Harvard App, but that Liebman was on vacation so we hadn't been notified. Maybe we will hear this week and positively. Please let me know.
2. George will be working with the Edna McConnell Clark Foundation to work on SIBs within their portfolio (including their \$50 million commitment to NFP) and he believes there might be some possibilities to work with SC, perhaps even if we aren't successful in the Harvard app
3. As we recently discussed, I think it is important to get together very soon to be clear on who is speaking to whom and about what. I know y'all have had some conversations directly with Social Finance and, I think, we want to make sure George doesn't get left out, particularly if we move to a competitive procurement at some point. *To that end, Megan will be in town this week and I am hoping we could sit down with you for a few minutes on Friday. We have encountered a few questions in the feasibility study that I believe you could answer (i.e. SC's appetite for seeking a 1115 waiver from the Feds to do a SIB, etc.). We are wide open on Friday.*
4. Finally, we are working with the Moore School of Business to host a SIB Workshop for about 40 investors attending their Fixed Income Summit in Charleston on *April 18 from 11-5*. We would love to have you speak to this group, if possible. Already confirmed speakers include Jackie Vanderburg (US Trust), Mike Forte (Cedarwood Consulting), Rick Edwards (Third Sector Capital) and someone from Social Finance. I think you would make an excellent contribution speaking from the government perspective. Please just let me know.

Thank you!

Joe

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