

Transform Global

The vision and plan to create a

Sustainable Innovation and Development Bank.

Strategic Overview

Summer 2021



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Preamble

There are hundreds of reference documents regarding the current and future strategic conduct of financial institutions worldwide in relation to the 17 SDG's and the 169 distinct action points therein.

Some of these are statements from specific 'banks'. Others are general overviews of IMF, World Bank, the UN etc covering failings since 2019 and how these institutions need to evolve further.

In addition there is a huge amount of emerging research/data about alternative sources of finance, investment and funding to meet the SDG's and support organisations as they attempt to contribute innovation, strategies, operational change and activities designed to meet the challenges set by the creation of the SDG's in 2015.

Strikingly and in short, there are currently serious shortcomings from those established financial organisations initially charged with leading the way in systemic financial change AND a proliferation of new and emerging players in the SDG Finance market.

In addition, there is growing research, much innovative thinking and emerging principles on how finance - money - can and should be used in the future - Impact/Integral/social economics, new business models, change in thinking about the place of charity and philanthropy, serious attempts at creating government-led legislation/policy funding change and, most strikingly, envisioned systemic change on the future role of business - and how business investment can and should be conducted.

The Set Up

In short, while many elements of the initial vision remain true - much has changed since Transform Global was first considered over 14 years ago. Much has also changed since the start of 2020. On the one hand the world is more committed to SDG related imperatives and other tangential systemic social change needs AND significantly more fragmented, polarised and confused about how to do this - notably through how finance is raised and deployed.

As Transform Global now builds on its foundational aspiration and developed since late 2006 it is, perhaps, time to review Transform Global's approach to market (in total via its wide target audience range) and its core vision - and therefore, development strategy.

As a first step, the following is a revised vision and narrative that includes various ways of re-framing Transform Global's current operating model without losing its current core structure.

Transform Global - Vision synopsis

We imagine a world where truly new, cohesive, integrated and inclusive ways of using financial capital wisely and well are created. We imagine re-engaging world citizens with the value of money and its vital contribution to essential world change.

We imagine a world where citizens can contribute to progress driven by financial capital and participate in the change they want to see. We imagine a world where finance is celebrated and where those who contribute financial capital are held in high regard.

We Imagine a world where money is democratised - NOT critically and inequitably judged by who owns it, but by how it is used wisely and well to benefit everyone. This brings together those who have it, those who use/deploy it and those who ultimately benefit from it, in ways never seen before - with a new shared sense of trust, respect and responsibility.

Transform Global - Strategic overview

At its core, Transform Global is a coalition of the willing, brought together to deploy Active Impact Capital wisely and well to best address the SDGs and range of local, scalable and replicable impact ventures and initiatives. Active Impact Capital is about finance in all of its forms - and how it can deliver maximum positive impact.

By being a 'coalition for change' composed of those who are determined to do good and do well for the benefit of humanity and the planet we inhabit, Transform Global is able to bring together the financial capital required, the ways that this capital can fill critical funding gaps AND the ways in which Active Impact can be delivered, at speed and scale, around the world.

In this, Transform Global is a new, unique and essential way of meeting the Sustainable Development Goals.

The Transform Global Coalition is centred around our Transform Global Trust Foundation and is composed of people from the worlds of finance, government, business, civil society, change-making institutions, innovation & creativity, systems design and those working and delivering ventures and initiatives 'on the ground'.

It is the Transform Global Trust Foundation that strategically defines how we can make the greatest and most important difference to how financial capital - and other capitals can be developed to meet the SDGs. It is our advisory board and innovation engine - it is our Rapid Response Unit.

The Transform Global Trust Foundation has oversight on 3 primary operational functions:-

1. **CAPITAL - The Bank.** Transform Global is the primary financial model governed by the Trust. It comprises:-
 - Many of the usual functions of an investment bank, AND
 - Transform Global Investments (acquisitions and equity stages to bring capacity to the bank)
 - SDG 360 Game Changer Fund (The multi strategy and catalytic permanent capital fund)
 - SDG 360 Fund Management (The wholly owned subsidiary and manager of the fund)
 - BIGCrowd (The mass collaboration, origination, funding and support platform for Big Impact Game-changers addressing the SDGs)

These are the ways that funding and investment are acquired and managed.

2. **CAPACITY - The Consultancy.** Transform Global Unstitution is the primary 'funded programme' deployment model/system governed by the Trust and centred around core principles and methodologies. It will be used internally and actively sold externally. It includes core teams and a Distributed Network and is composed of:-
 - A dedicated Transform Global Unstitution Advisory Board
 - A dedicated research, knowledge, education and insight development hub
 - An ecosystem of Ambassadors based geographically worldwide to lead our operations
 - An ecosystem of specialist organisations focused on building binding coalitions

3. **COMMUNICATIONS - The Media.** Transform Global Media is the primary 'Super Agency' and 'valuable content' delivery mechanism and 'window on the world' for The Trust, The Bank and Unstitution.
 - It is our content and communications engine for everyone associated with Transform Global and everyone concerned with tackling the SDGs at scale and speed.

A primary part of Transform Global Media is FundingtheGlobalGoals.TV (the multi format media platform to help move money to where it can better serve people and planet globally)

In combination, The Transform Global Trust Foundation, Transform Global, Transform Global Unstitution and Transform Global Media form the most innovative, compelling, exciting and complete ways that money can be used wisely and well. Our aim is nothing short of a complete re-appraisal and re-definition of both investment and financial capital use for the future benefit of humanity and the planet we inhabit.

Finding, funding and supporting those who think and do differently to address the SDGs.



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[Link to Transform Global Extended Summary,](#)

[Link to Investor Overview](#)