

EXPLORE

UNLOCK

DEPLOY

Local Investing for Impact Fundamentals[©]

Explore community, capacity and opportunities

- Build awareness of place-based investing landscape and possibilities
- Take stock of your current non-grant local investments
- Explore capital flows and gaps in sectors and communities to identify local capital challenges and opportunities
- Target and define desired community impact
- Align foundation priorities to community needs by engaging partners
- Commit to the use of place-based impact investments to generate measurable community benefit

Unlock foundation's systems and resources

- Identify investable assets
- Adopt local impact investment policy
- Draft local investment strategy weighing risk, liquidity, return, and impact
- Integrate investment staff and finance processes with impact-focused staff and systems
- Build internal capabilities to source, assess, deploy, and manage
- Connect with like-minded community investors and review strategies
- Cultivate community capital partnerships including key intermediaries
- Communicate local investment strategy to community partners, donors, co-investors and others

Deploy investments and make a local impact

- Source opportunities
- Document opportunities and assess using the foundation's local investment strategy
- Conduct due diligence on select opportunities and negotiate transaction with both financial and impact covenants
- Deploy investment
- Manage investment and monitor for financial and impact performance
- Report local impact and financial return to relevant stakeholders
- Gauge strategy performance and improve