That's a Wrap:  
Looking back at successes in 2018 – and trends for 2019

This month, we take stock of the LOCUS journey and think ahead towards local impact investing in 2019.

Our team has had a busy 2018 as we continued our mission to empower place-focused institutions around the country to explore impact investing; unlock assets by identifying investment areas and partners; and deploy their capital for catalytic change in their communities. Throughout the year, we saw interest grow rapidly as the world of philanthropy recognizes place-based impact investing as a tool for transformational community change, complementing its traditional grant-making role.

As interest in the impact investing field grows, we will continue putting our community development philanthropy and finance expertise to work helping foundations understand their critical role in economic prosperity and place-based impact investing. We will continue to help foundations identify investable opportunities and partners, mitigate their financial and social risks, amplify the social impact of their investments, and enhance operational efficiencies.

Here’s a quick look back at some of our efforts in 2018...and a look forward at the trends we see for 2019... – Read More On Our Blog
The Future of Rural Texas: A Texas Tribune Symposium. LOCUS Senior Vice President Deb Markley attended a gathering focused on rural policy and practice in Texas, sponsored by the Texas Rural Funders Collaborative. Participants dove deep into thinking about current and future rural issues, including education, health care, resource conservation, and infrastructure investment.

Opportunity Zones: Can Foundations Help Communities Get Ready? LOCUS Financial Strategist Adam Northup spoke on a webinar panel of regional philanthropy and community development professionals hosted by the Council on Foundations (CoF). He shared how LOCUS and the field are thinking about opportunity zones and how place focused foundations can align their interests with the new tax provision. CoF members can view a recording of the webinar here. Questions about the talk and opportunity zones can be directed to Adam Northup.

Financial Activists Leveraging Capital for Positive Change. LOCUS Solutions Consultant Travis Green participated in his first RSF Capital Intensive hosted by RSF Social Finance. The first of three in-person training intensives, Travis traveled to Pacines, CA to learn how to structure complex financial transactions and implement effective integrated capital strategies alongside experts in the field. – Learn More

BALLE Shift Capital Summit. LOCUS Senior Vice President Deb Markley participated in a convening hosted by Business Alliance for Local Living Economies (BALLE). Participants gathered in Pacific Grove, CA, to strategize on how to accelerate the flow of financial and social capital to leaders doing critical groundwork across North America. See the summit agenda here.
United Philanthropy Forum will host its December Public Policy Peer Community call, available to forum members, on December 11, 2018. During the call, LOCUS Financial Strategist Adam Northup will share information and answer questions about opportunity zones. – See More

The Kresge Foundation posted a blog article, "Mission, Money, and Markets: Back Office Lessons from the Impact Investing Front," discussing the foundation's impact investing journey, including its need to develop an impact investing back office. Kresge outsources it's PRI portfolio management to LOCUS. – Read More

Evergreen Cooperatives, a cooperative where workers share ownership and management decisions, announced the Fund for Employee Ownership, a fund designed to support conversion of businesses into cooperatives. – Read More

A new report from the Urban Institute, “Measuring Community Needs, Capital Flows, and Capital Gaps,” provides a how-to guide for assessing community need, studying capital flows, and determining capital gaps. – Read More

Democracy Collaborative released a report, “Community Control of Land and Housing,” highlighting Bon Secours Health Systems work drawing connections between housing and health and the pivotal role of anchor institutions in equitable economic development. – Read More


A few months ago, LOCUS presented at "Inclusive Economic Prosperity in the Midwest" a conference hosted by CoF. Twin Cities Business published an article reflecting on the event and how foundations should approach economic development. – Read More

ImpactAlpha posted an article outlining practical steps to better connect Donor Advised Funds (DAFs) and impact investing. The piece, by Nick Salter of Progressive Philanthropy Group, was a followup to an article in Inside Philanthropy. – Read More

Jed Emerson, Senior Fellow with ImpactAssets, released a new book "The Purpose of Capital: Elements of Impact, Financial Flows, and Natural Being." The book examines investing using a historic and philosophical context as well as investors' understanding of the meaning of money. – Read an Excerpt

Campbell University posted its fourth in a series of blog posts summarizing the contributions of its Rural Philanthropic Analysis Project (RPA). The post investigates foundation-supported programs that bolster leadership in rural areas. – Read More

Cornerstone Capital published a report, "Mobilizing Donor Advised Funds for Impact Investing," that outlines how capital held in donor advised funds can be invested to further impact goals. – Read More
A report from Global Impact Investing Network (GIIN), "Financing the Sustainable Development Goals: Impact Investing in Action," collects five case studies that show how sustainable development goals can be woven into the investment cycle. – Download the Report

Where You'll Find the LOCUS Team

**United Philanthropy Forum Public Policy Peer Community**
Dec. 11 Webinar
*Adam Northup is a speaker. (Forum Members Only)*

**Confluence Philanthropy 9th Annual Practitioners Gathering**
March 5 Brooklyn, NY
*Teri Lovelace is a speaker.*

**2018 VCC Learning Exchange**
Dec. 13 Richmond, VA
*The LOCUS Team will participate. The event will be broadcast via live-stream. Check here for updates.*

**RSF Integrated Capital Institute Intensive**
March 10-14 Petaluma, CA
*Travis Green will participate in his second Integrated Capital Institute Intensive. (Private Event)*

**CoF Leading Together Conference**
April 29-May 1 Miami, FL
*Teri Lovelace is a speaker.*

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