

Place-based Investing

CREATING SUSTAINABLE
RETURNS AND STRONG
COMMUNITIES

INTEGRATED CAPITAL APPROACH

A holistic integrated capital approach may be required to create the necessary community supports and interventions needed to sustain community health and well-being.

This approach might include investments across a range of asset classes in coordination with community benefit grants and human and social capital, such as access to mentors, learning circles, and technical assistance.

COMMUNITY BENEFIT

HEALTHY FOOD
PRODUCTION & ACCESS

FEDERALLY QUALIFIED
HEALTHCARE CENTERS
(FGHCS)

COMMUNITY & CHILD-
CARE FACILITIES

STABLE, WELL-
PAYING JOBS

AFFORDABLE HOUSING
& SUPPORTIVE HOUSING

TRANSIT-ORIENTED
DEVELOPMENT

RENEWABLE ENERGY
& ENERGY EFFICIENCY
PROJECTS

ECONOMIC DEVELOPMENT
AROUND ARTS & CULTURE

MINORITY-, WOMEN-
& EMPLOYEE-OWNED
BUSINESS START-UP,
GROWTH & RETENTION

PARTNERING FOR SCALE

Collaborate with and leverage the resources of other key partners for greater impact. This includes:

- Local governments
- Place-based foundations
- Other anchor institutions, like hospitals and universities
- Community economic development financing entities
- Impact investors

PLACE-BASED INVESTING OPPORTUNITIES ACROSS ASSET CLASSES

LEVERAGE YOUR
INVESTMENT PORTFOLIO
TO CREATE COMMUNITY
HEALTH.

ASSET CLASS CASH & CASH EQUIVALENTS

Cash & cash equivalents: deposits in local, community development banks and credit unions.

Leverage sizable balance sheets as a leading local employer to expand access to capital in local and underserved communities through deposits that finance loans to community members and help local businesses expand.

ASSET CLASS FIXED INCOME

Fixed income: geographically targeted private and public debt investments.

Provide capital to financial intermediaries that invest responsibly in local and underserved communities and offer debt capital to borrowers that address social, economic, and environmental needs.

ASSET CLASS PRIVATE EQUITY & VENTURE CAPITAL

Private equity & venture capital: equity investments in local private enterprises with positive community benefits.

Seed, scale, and retain locally owned businesses through private equity and venture capital investments. Help convert businesses to employee ownership.

ASSET CLASS REAL ASSETS

Real assets: investments in local infrastructure, real estate, and commodities with positive social and environmental impacts.

Help maintain affordability of residential and commercial properties to create a more equitable local economy that supports health and well-being. Support the local economy through market-rate investments in community renewable energy projects, and sustainably managed forests and farmland.

EXPECTED FINANCIAL RETURN ON INVESTMENT

No Financial Return
Positive social and/or
environmental return

COMMUNITY BENEFIT
Grants
Technical Assistance

PLACE-BASED INVESTMENT VEHICLES
Cash
Private Debt
Public Fixed Income
Real Assets
Private Equity & Venture Capital

Market rate of return
Positive social and/or
environmental return