

Common New Investor Activities (12+ months)

Develop investment opportunities

Identify potential sourcing partners

Conduct sourcing conversations with local partners

Assess opportunities for alignment and draft initial summary memos

Conduct due diligence on identified transactions

Expand culture and capacity within the foundation

Deliver field research and educational materials for board conversations

Support staff and impact investing committee work

Connect local impact investing with foundation strategic plan

Facilitate training for staff, board, and partners

Deploy and manage capital

Design the local impact investing implementation and oversight systems

Evaluate community bank partners and readiness to support servicing and due diligence

Understand local opportunities for innovative capital

Discuss sector-specific investment opportunities (e.g. broadband)

Discuss use of non-lending financial tools (e.g. guarantees)

Map the local investment ecosystem