

ENVIRONMENTAL, SOCIAL AND GOVERNANCE (ESG) POOL

The Greater Cedar Rapids Community Foundation recognizes that donors have an interest in allocating charitable dollars in a way that is consistent with their ethics and values. Therefore, it offers an investment pool for donors who want to generate a competitive market return while also investing for the societal good. The Environmental, Social and Governance (ESG) Pool is a diversified and asset allocation driven portfolio of investment managers that seek to advance the issues of environmental, social and governance investing.

Investment managers will select companies to invest in with these concerns as their priority:

Environmental Concerns

Investors will consider environmental and energy matters as a metric of corporate performance. This can include companies involved in clean air, clean water, climate change, etc.

Social Concerns

Investors will consider relationships with stakeholders such as employees, customers, communities, and governments as a metric of corporate performance. Examples include gender diversity, employee satisfaction, treating customers fairly, etc.

Governance Concerns

Investors will consider the short and long-term impact of Board decisions on the shareholders of the firm. This can include disclosure of political contributions, executive compensation, long-term health of the company, etc.

Taking these types of concerns into account helps build a better risk-adjusted portfolio that also is in alignment with the donor's values and beliefs.

To discuss incorporating environmental, social and governance investment strategies into your portfolio, contact us at 319.366.2862 or info@gcrf.org.