

Engage Donors and Co-Investors

What is it?

Engage Donors and Co-Investors offers foundations a detailed analysis of the geography and characteristics of prospective donor households and likely philanthropic co-investors. Using zip codes or neighborhoods, the report maps a foundation's promising leads including information on wealth, age, household size, and other socioeconomic traits. These valuable insights help finance, program and development teams better **identify and energize these prospects**, a prerequisite to developing the assets needed to achieve a foundation's desired outcomes.



What value does it provide?

For decades major retailers have used maps and household data to assess demand for their stores. LOCUS's Engage Donors and Co-Investors report uses the same information to help identify potential demand for philanthropic donor and investor services. The report includes a broad snapshot of the foundation's geography, but it also details – with guidance from the foundation – areas with large concentrations of high net-worth households. This data helps a foundation assess gaps in its community outreach and development processes. *How can our programs inclusively engage residents across the region? Do our communications speak to the interests and needs of our prospective donors and investors? Does our board membership help build relationships with the target communities?*

When is Engage Donors and Co-Investors the right solution?

For the foundation that is developing a capital campaign or planned-giving strategy, establishing and capitalizing a local impact fund, or creating a communications and marketing plan, LOCUS's Engage Donors and Co-Investors report offers critical community data to supplement information learned through more traditional community engagement processes.

How has it been used most effectively?

Engage Donors and Co-Investors is a natural follow-up to LOCUS's Unlock Your Transfer of Wealth™ study. Once a foundation has quantified the philanthropic potential of the region, the next step is developing a strategy to capture it. Engage Donors and Co-Investors helps a foundation take that next best step in realizing their Transfer of Wealth™ opportunity. Another great use for the report is helping identify areas of high net-worth households that can be critical partners in exploring and executing a local investment strategy at the foundation. These households can help capitalize a philanthropic local investment fund or, in some cases, integrate capital for greater community impact.

How can I learn more about LOCUS?

To learn more about LOCUS' solutions and tools, please contact **Sydney England** at sydney@locusimpactinvesting.org or at 804.793.0985.