

## Local Impact Investing Consultation

### What is it?

The LOCUS team is committed to empowering place-focused foundations to invest their capital locally to build prosperous, vibrant communities. We are working hard to develop solutions that meet **foundations where they are and help them define and take action** that advances a local investing strategy. But, we know that a foundation may want more customized guidance, insights and support along the way. The LOCUS team can design and deliver one-on-one support for a foundation team to build the capacity for local impact investing.



### What value does it provide?

The LOCUS team has decades of experience working with foundations; we bring a continuum of solutions and tools to our work. We can use empowering research to help a foundation better understand its community and economy or build support for local investing with board, staff and community partners through education and compelling stories from the field. We can work with a foundation to develop local investing policies and procedures and provide due diligence on potential partners.

### When is Consultation the right solution?

We recognize that the journey toward local impact investing is as unique as the place-focused foundation making that journey. Consultation is a good option for foundations that want more customized support than is available by attending a **Local Impact Investing 101** workshop or even a **Local Impact Investing Boot Camp**. Consultation is also useful for addressing particular barriers – or opportunities – encountered in pursuit of a local investing strategy, whether related to specific types of local investing products (e.g., PRI vs. loan guarantees) or specific policies (e.g., loans to nonprofit vs. for-profit businesses). The LOCUS team will work hand-in-hand with a foundation to design and deliver a customized solution that primes the foundation for action.

### How has it been used most effectively?

Consultation is an effective solution when you need more one-on-one guidance as you develop your foundation's unique impact investing strategy. Its uses are as varied as the foundations we work with:

- Delivered a virtual presentation to a foundation board to introduce the concept of impact investing
- Developed a draft organizational structure for an impact fund being considered by a network of regional funders
- Provided technical support to a network of local healthcare systems exploring local investing

### How can I learn more about LOCUS?

To learn more about LOCUS' solutions and tools, please contact **Sydney England** at [sydney@locusimpactinvesting.org](mailto:sydney@locusimpactinvesting.org) or at 804.793.0985.