



# SETTING YOUR SOCIAL IMPACT STRATEGY

MAY 27, 2021

WELCOME

# TODAY'S AGENDA

## Welcome and Introduction

### Strategic Insights from Filene & Callahan

- ▶ Integrating social impact into your strategic plan
- ▶ Setting strategy to achieve impact
- ▶ Building capacity, conditions, & infrastructure

### In Conversation

- ▶ How can efforts to create social impact advance your strategic plan?
- ▶ What steps should credit unions take?
- ▶ How should credit unions set priorities?



**TAYLOR C. NELMS**

Senior Director, Research  
Filene Research Institute

WELCOME

# SPECIAL GUESTS



**Dr. Mai Thi Nguyen**

Director, The Design Lab  
University of California San Diego



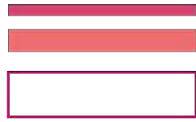
**Jon Jeffreys**

President & CEO  
Callahan & Associates



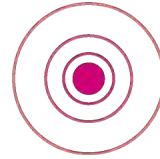
# STRATEGIC INSIGHTS FROM FILENE & CALLAHAN

# SOCIAL IMPACT & STRATEGIC PLANNING



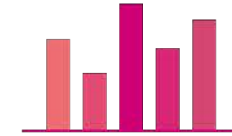
## IMPACT

While organizations should expect to be able to prove their impact, this proof should come from the organizations and communities being supported.



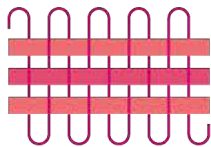
## FOCUS

Aligning philanthropic activities with strategic and business objectives.



## DATA

To determine which partnerships will have a positive impact on their stakeholders (employees, brand, consumers, general public).



## CULTURE

Organizations benefit when social impact work is a part of their identity and activity.



## LEADERSHIP

Leaders are seeking not only to get involved, but to show that they are sincerely engaged in their organization's philanthropic efforts.



## INNOVATION

Existing approaches seldom solve society's most intractable problems, and organizations should look for opportunities to support experimentation and exploration.

# FIRST STEPS: SET STRATEGY TO ACHIEVE IMPACT

1



Know your  
community's  
history.

2



Dig at the “why”  
and identify  
root causes.

3



Aim for  
systemic and  
structural  
change.

4



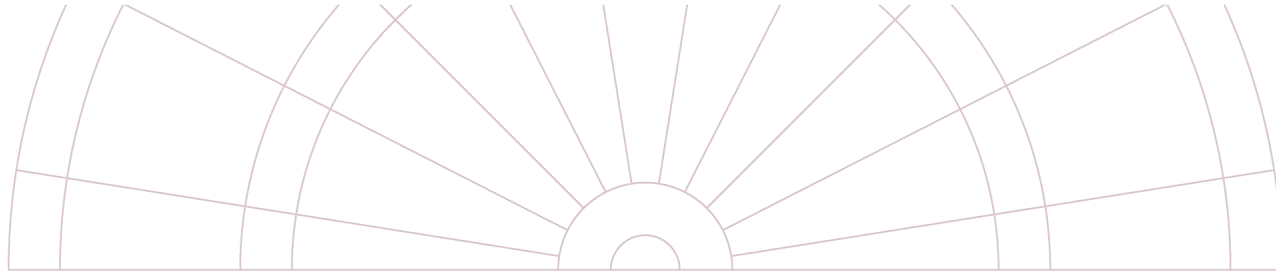
Partner and  
co-design with  
community  
stakeholders.

5

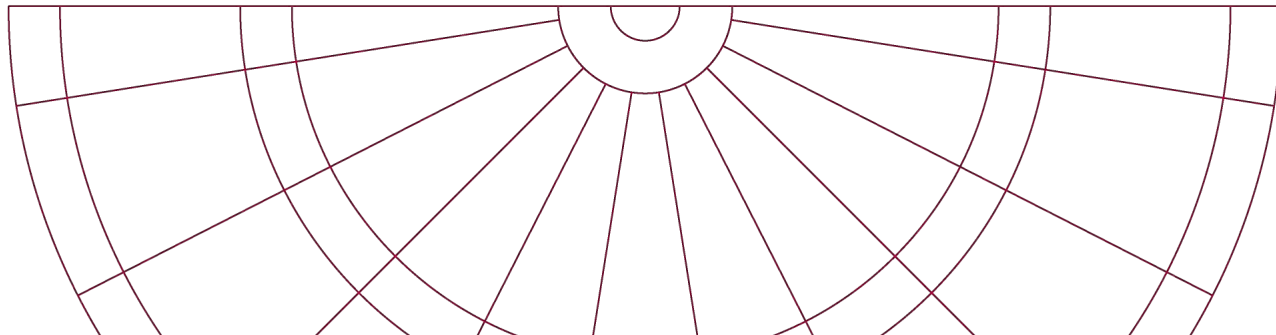


Prototype,  
iterate, and  
evaluate.

# CAPACITY, CONDITIONS, & INFRASTRUCTURE



C.A.M.P.I.N.G.



**C**lear agenda

**A**lignment

**M**easurement

**P**atience

**I**ntegration

**N**arrative

**G**reyhound

*Context & fit: putting the right talent  
in the right seats on the bus*





# IN CONVERSATION

*Next Steps for Credit Unions*



THANK YOU

# ACKNOWLEDGMENTS

Filene thanks its sponsors of the Center for Community Social Impact for helping to make this research possible.



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WANT MORE?

# DIVE DEEPER



WHAT DOES IT TAKE  
FOR A CREDIT UNION  
TO BECOME A PILLAR  
IN ITS **COMMUNITY**—  
AND TO LEVERAGE ITS  
**SOCIAL COMMITMENTS**  
FOR IMPACT AND GROWTH?

Join us for a two-day virtual event exploring the unique opportunity credit unions face to reinvest in their value proposition as community financial institutions while tackling the most critical social challenges of our time.

This event will also preview the initial results from Filene's industry-wide DEI Practices and Policies Survey and serve as a launch for the Center of Excellence for Community Social Impact.



## Join us!

Visit [filene.org/amplifyimpact](https://filene.org/amplifyimpact) to save your spot at our next virtual research event.

## Have questions or comments about today's presentation?

Contact Filene's Senior Director of Research.

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