

STRATEGY GUIDE FOR

CREATING SOCIAL IMPACT

AUGUST 25, 2022



WELCOME

TODAY'S AGENDA

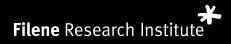
- Welcome & Introduction
- Strategy Guide for Creating Social Impact
 - Identify the most pressing social problems
 - Build effective partnerships & co-create solutions
 - Execute on your social impact strategy
- Panel Discussion
- Q&A



Robin Brulé

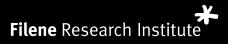
Senior Director, Philanthropic Partnerships

Filene Research Institute





STRATEGY GUIDE FOR CREATING SOCIAL IMPACT



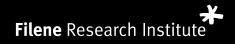
IDENTIFY PRESSING SOCIAL PROBLEMS

Credit unions can play a role in solving complex societal challenges.

- **Define** the community you seek to serve.
- Learn about community assets and needs. Dig at the why.
- Identify ways to improve access to human, social, and financial capital based on the factor you decide to address.



Sources: Filene Research Institute #566; Filene Research Institute #527



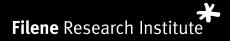
BUILD PARTNERSHIPS & CO-CREATE SOLUTIONS

Align your credit union resources and strengths with community needs.

Develop a social impact plan with community partners.

Co-design solutions to enhance collective capacities so you can address more complex social challenges.





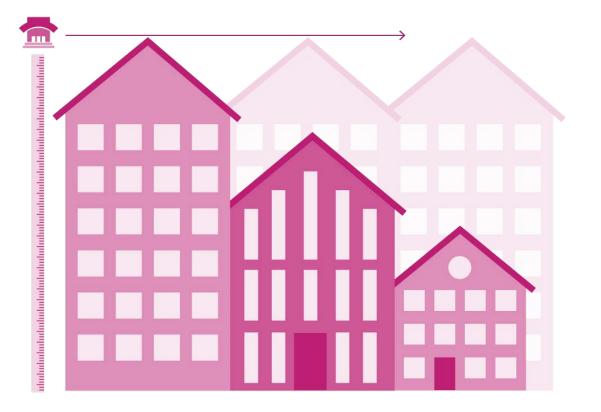
EXECUTE ON YOUR STRATEGY

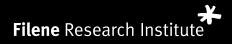
Build a sustainable strategy. **Ensure alignment** with your business activities, philanthropic plan, and partner objectives.

Measure and demonstrate.

- Use measurements to iterate and improve.
- Share your story with stakeholders.

Develop innovative practices and partnerships.





WELCOME

SPECIAL GUESTS



Mai Thi Nguyen

Director, The Design Lab; Professor, Urban Studies and Planning

University of California San Diego



Emma Garcia

AVP Community Relations & Engagement

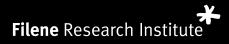
Desert Financial Credit Union



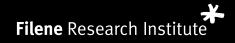
Julian Wyatt

CDFI Manager

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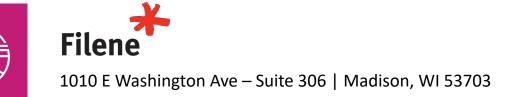


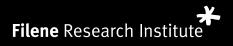


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QUESTIONS?



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