

Filene Research Institute 

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**

YOUR HOST



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
Urban Strategies, Inc



Q & A

THANK YOU

ACKNOWLEDGMENTS

Filene thanks its strategic partners supporting the Center for Community Social Impact for helping to make this research possible.



Filene *

1010 E Washington Ave – Suite 306 | Madison, WI 53703

QUESTIONS?



Robin Brulé

Senior Director, Philanthropic Partnerships

robinb@filene.org