

June 12–14
Pacific Grove, California
nativecdficonvening.org



2018 Native CDFI Capital Access Convening

Bringing Native CDFIs, Funders, and Investors Together to Bring Capital to Native Communities





















# I'm A Goat and You're a Butterfly: Showing Impact and Creating Your Brand

Pacific Grove, California



















### Who's Who?

























### **Presenters**



### Michael Brydge, Sweet Grass Consulting, LLC

Principal Director of Development and Community Engagement

### April Lemly, Ponderosa Group

Creative Director and Head Designer



















## Workshop Goals



- 1. Storytelling for your business and how you use it.
- 2. Prioritizing data to tell an impactful story.
- 3. Actualizing the importance of follow-up data.
- **4. Understanding** best practices for showing impact from data.
- 5. Establishing brand trust.
- 6. Using your brand to market your organization.



















### **Brand Grid**







































# RDF Personality is...



Cotton-otter-overstuffed-chair-salad-purple-Honda-Element-walk-in-the-woods-by-anysong-by-Jimmy-Buffet-be-kind-to-one-another!













































# How's Your Kit Doing?



- The components
- The rules
- How do you use them together...

EXERCISE: From The Ground Up!





















# Storytelling for Your Business



- 1. Who you are...
- 2. What you specifically do...
- 3. How you solve problems...
- 4. How you add value and care...
- 5. How you engage and contribute... and more



















# **Prioritizing Data**



- When do you clean your home?
- Common Indicators: What are you collecting?
- How are you collecting, to whom are you collecting for, why are you collecting?











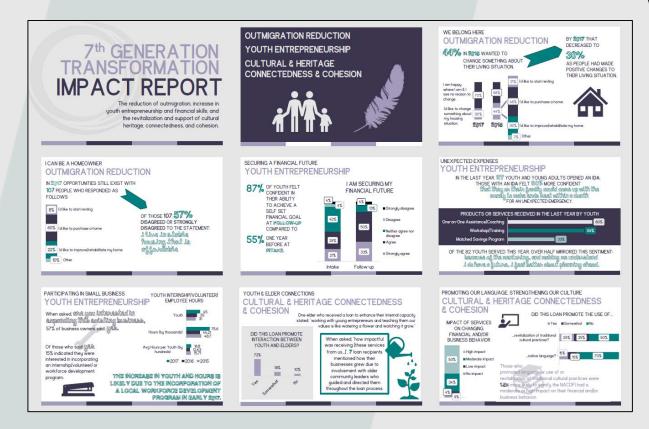








### Actualizing Follow-up Data

















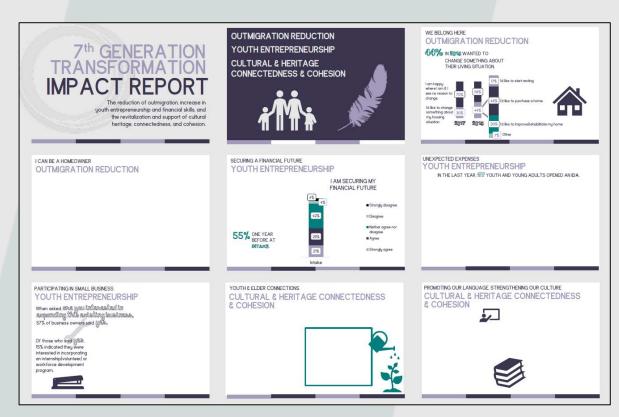




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### Actualizing Follow-up Data























### **Understanding Best Practices**



#### SUCCESSFUL STORYTELLERS

Sol Grass landing LC

#### START FROM THE START

When developing a new program, service, curriculum, or initative develop data collection instruments and impact measurement from the beginning. This way, data and impact measurement

#### TELL A STORY

Incorporate a "Story of Us" or "Our Story". This provides a space for people in your organization to track powerful, impactful stories, typed out, anytime they occur. The stories provide substance and life to the numbers CDFIs report on. They should also be easily accessible to your organizations' point person for communication, so they have quick, updated access to stories that can be provided to newspapers, newsletters, reports, Facebook, or other story-telling venues.

evolves alongside the new development. Also, you will be able to collect information from the beginning, assuring baseline impact measurement from the beginning. Several of our clients have openly told others "it: is much easier to start building an impact measurement" if you start from the beginning

#### **BUILT IN IMPACT TRACKING**

A Native CDFI provided online trainings to enhance entrepreneurial skills and increase their cultural knowledge of Native concepts as well. The client was uncapable of starting the training until they took an online portest. After the training, the client was unable to print out a certificate of completion until they took an online post-test. This organization demonstrated the knowledge growth they had hoped for in their granting objectives and simultaneously required greater attention from clients during the training. These certificates, rest assured were not just another piece of paper in the resumé file cabinet, but assurance of a training well spent.

#### STORIES CREATE CHANGE

A community development corporation did not like the story their data was telling them. Their impact tracking system allowed them to see their program was not meeting their desired outcomes of success. So, they used the opportunity to better situate themselves to respond to community needs in a different way. As a result, the next chapter in their story will be much more useful, meaningful,

#### UNASHAMED PERSISTENCE

others, has pre- and post-tests to determine knowledge growth for their workshops and trainings. This particular organization has higher rates of success measuring training impact, compared to most Native CDFIs. When asked about their success, their Executive Director laughed and explained, "After a training jump in their car and I won't let go until they fill our a post-test." Humorous yes, but this was her way of saying, the post-test is considered mandatory and they have processes in place that let clients know that post-test completion is expected by staff, trainers, and even administration.

and wish to document the ways participants are being impacted, have a group of people who do not utilize the program or service fill out your impact assessment as well. Compare the results of the two groups and you may be pleasantly surprised. One of our client's program was federally recognized once they were able to prove the impact the program had, by comparing tribal members on the reservation to tribal members who lived off the reservation and were thus not able to benefit from the program.

- Start from the Beginning
- Incorporating a "Story of Us" (not all about #'s)
- Built in Impact Tracking
- Dare to Compare



















### **Understanding Best Practices**



### FIND OUT WHY PEOPLE DON'T FILL OUT FOLLOW UP ASSESSMENTS. IS IT A LACK OF TIME, THE LENGTH OF THE SURVEY, LACK OF INTEREST, ETC.?



Integrate refundable loan application fees for completed data

Keep follow-ups short and simple to complete Make follow-ups mandatory for the completion of the training or service

Keep clients updated on the progress of the program, keep them involved and invested in the success of the program

Highlight the achievements of participants who have completed follow-ups in a newsletter, blog, etc.

FOLLOW UPS

Utilize loan cohorts for sharing impacts and peer accountability



Make follow-ups more enjoyable by making them interactive and creative

Offer strategic incentives such as, gift cards, trainings, money, and contests



#### THINK OF WAYS TO MAKE FOLLOW UPS MORE ENJOYABLE

You can collect data in a variety of fun and creative ways such as online video quizzes, nteractive software or PowerPoints, focus groups, etc. Have participants journal during their time in the program. They can then submit this journal in at the end of the program. While this may not capture much quantitative data, it may serve as a great source of qualitative data. You can have clients submit a photograph of the most successful impact they received from your services.

Encourage them to follow-up because their efforts (completing the follow-up) contribute towards something meaningful/big/stetr-retc. Make the follow-up an event, Invite previous participants to join together at a celebration/meal/party/etc. At the event you can orchestrate focus groups, interviews, discussions, have them fill out a follow-up survey etc. Think about incentives.

Visit their home, call them on the phone, do SOMETHING to make sure that they can't just delete an e-mailed online survey or throw away a mailed survey. Make it more personable. Instead of sending them an online link, ask them if they have a specific time available for a phone call.

- Refundable loan application fees for completed data
- Make follow-ups enjoyable (ie. PhotoVoice)
- Offer Incentives



















### What is Brand Trust?



- How do we get there?...Be genuinely you. People trust real people.
- Be available. Post hours, make appearances, talk to your community
- Maintain your standards. Keep your word.
- If you mess up own it, fix it and get back up
- Show the faces of the business



















# Using Your Brand for Marketing



**EXERCISE: "Good Times"** 

Think of a time when your organization was at it's best...

Tips...



















## Q and A



Thank you! It's early in the week, make sure you find us to answer all of your 'brand and impact' questions

















