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.
RDF Personality is...

RAIN DROP FARMS

PHILOMATH, OREGON

GROWING SPECIALTY CUT FLOWERS IN THE BEAUTIFUL WILAMETTE VALLEY SINCE 1999

Aaron Gaskey & Erin McMullen

www.raindropfarms.net
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

7th Generation Transformation Impact Report

Outmigration Reduction
Youth Entrepreneurship
Cultural & Heritage Connectedness & Cohesion

I CAN BE A HOMEOWNER
Outmigration Reduction

87% OF YOUTH FEEL CONFIDENT IN THEIR ABILITY TO ACHIEVE A SELF SUSTAINING FINANCIAL GOAL AT ANYAGE COMPARED TO ONE YEAR BEFORE AT ANYAGE.

I'M SECURING MY FINANCIAL FUTURE

87% of youth feel confident in their ability to achieve a self-sustaining financial goal at any age compared to one year before at any age.

55% OF YOUTH HAD A FULL-TIME JOB BEFORE STARTING.

I BELONG HERE
Outmigration Reduction

BY RICH THAT DECREASED TO 80% AS PEOPLE MADE POSITIVE CHANGES TO THEIR LIVING SITUATION.

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Actualizing Follow-up Data

7th GENERATION TRANSFORMATION IMPACT REPORT
OUTMIGRATION REDUCTION
YOUTH ENTREPRENEURSHIP
CULTURAL & HERITAGE CONNECTEDNESS & COHESION

WE BELONG HERE
OUTMIGRATION REDUCTION
40% in BCW wanted to
change something about
their living situation

I CAN BE A HOMEOWNER
OUTMIGRATION REDUCTION

SECURING A FINANCIAL FUTURE
YOUTH ENTREPRENEURSHIP
I AM SECURING MY FINANCIAL FUTURE
55% one year

55% one year

PARTICIPATING IN SMALL BUSINESS
YOUTH ENTREPRENEURSHIP
When asked what your business needed to
improve, 3% said marketing, 3% business
counselors and 2%

YOUTH & ELDER CONNECTIONS
CULTURAL & HERITAGE CONNECTEDNESS & COHESION

UNEXPECTED EXPENSES
YOUTH ENTREPRENEURSHIP
In the last year, 47% youth and young adults opened an
account.

YOUTH & ELDER CONNECTIONS
CULTURAL & HERITAGE CONNECTEDNESS & COHESION

PROMOTING OUR LANGUAGE, STRENGTHENING OUR CULTURE
CULTURAL & HERITAGE CONNECTEDNESS & COHESION
Understanding Best Practices

- 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.?

<table>
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<tr>
<th>Integrate refundable loan application fees for completed data</th>
<th>Keep follow-ups short and simple to complete</th>
<th>Make follow-ups mandatory for the completion of the training or service</th>
</tr>
</thead>
</table>

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

- **Follow-Ups**
  - Highlight the achievements of participants who have completed follow-ups in a newsletter, blog, etc.
  - Utilize loan cohorts for sharing impacts and peer accountability
  - Offer strategic incentives such as, gift cards, trainings, money, and contests

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

- Encourage them to follow up because their efforts (completion of follow ups) contribute towards something meaningful (like planting trees, etc).
- Make the follow-up event invite previous participants to join you for a celebration/mini party, etc. At the event, you can orchestrate local group interviews, discussions, have them fill out a follow-up survey, etc. This will give you insights about what helped them.
- Visit their home, call them on the phone, do something to make sure they’re not just an anonymous data point. Consider throw away a mailed survey. Not the most enjoyable. Instead of sending them a phone call, ask them if they have a specific time that’s good for a phone call.

#### Key Points

- **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
EXERCISE: “Good Times”

Think of a time when your organization was at its 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.