



OPPORTUNITY THROUGH IMPACTS SYSTEM



OTIS Unleashed!

Tracking Your Organization's Impact

27 June 2019 – Lihue, Hawaii

**WELLS
FARGO**



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Learning Objectives



- What is an Impact Measurement Program?
- What is OTIS?
- Why was OTIS created?
- How does OTIS work?
- How can you make OTIS work for your organization?
- What are the impacts of what OTIS is doing?



Introductions



- Your Name
- Your Organization
- If you had to name one frustration with data/impact/outcome collection, analysis, or reporting what would it be?



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The impact measurement program



Why do you want the impact data?

- Identify Outcomes
- Develop Metrics and Indicators

Metrics

Evaluation
Tools

- Data Collection Instruments
- Data Harvest

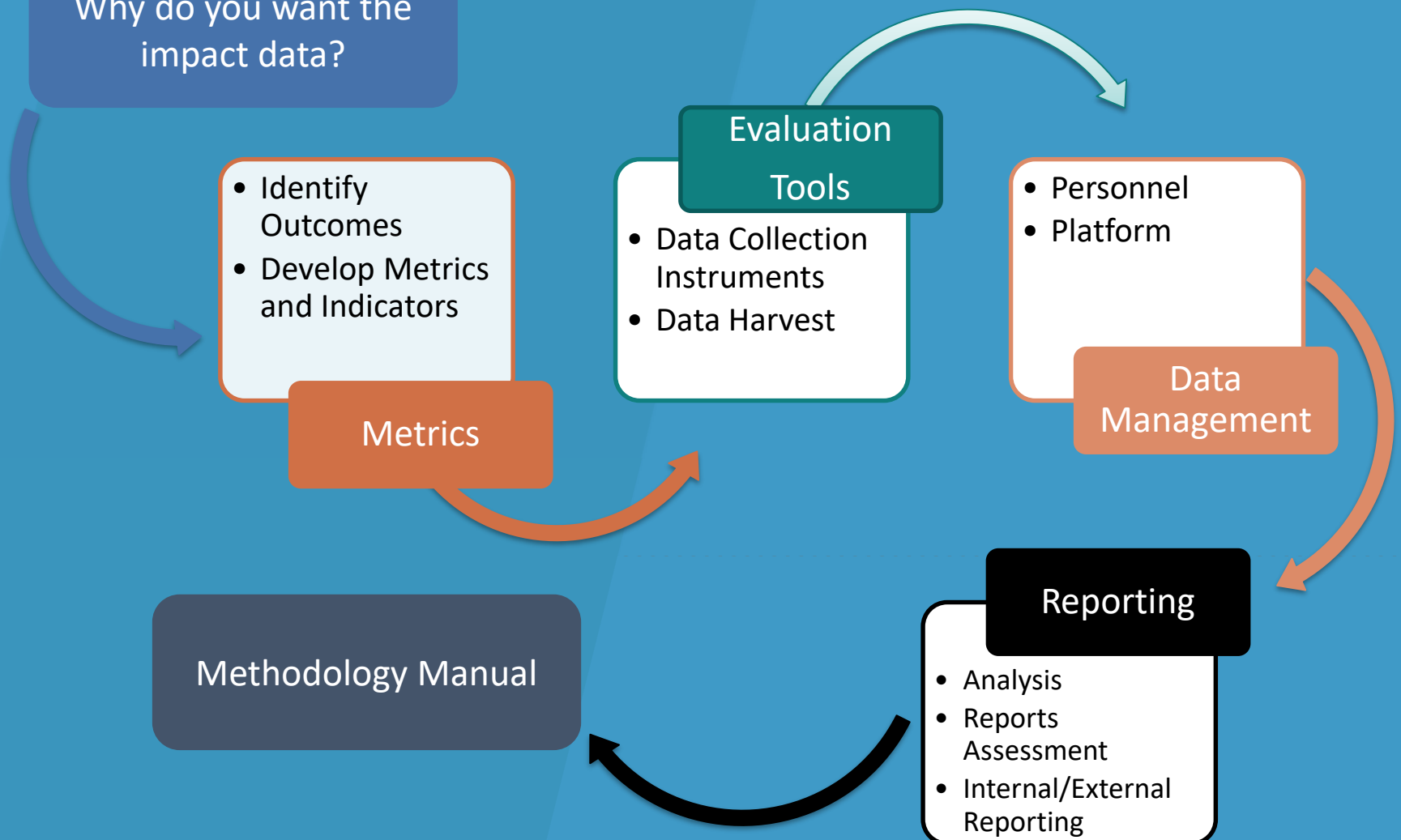
- Personnel
- Platform

Data
Management

Reporting

- Analysis
- Reports Assessment
- Internal/External Reporting

Methodology Manual



What is OTIS?



OTIS is an impact tracking system built on an OutcomeTracker by Vista Share platform, designed specifically for Native CDFIs. As a fully customizable solution, it can help you track your Native CDFI's unique impact, and assist with grant writing and reporting, capital investment campaigns, and much more.



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Why was OTIS created?



- To fulfil a need NCDFI's have for a customized impact database and client forms and processes
- To help with effective impact reporting on the work of your NCDFI
- To help provide data for grant writing
- To provide an affordable database system
- To collect and report NCDFI industry level data
- To supplement NCDFI policy and advocacy efforts
- To speak to the impacts specific to NCDFI's



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How was OTIS created?



- Extensive Research
- Decision to Use OutcomeTracker Software
- Development of Form Templates
- Advisory Committees & Feedback Process
 - Systems Development Committee with 6 Native CDFI industry representatives
 - Executive Committee with 3 CDFI Industry representatives
- Two Pilot Groups



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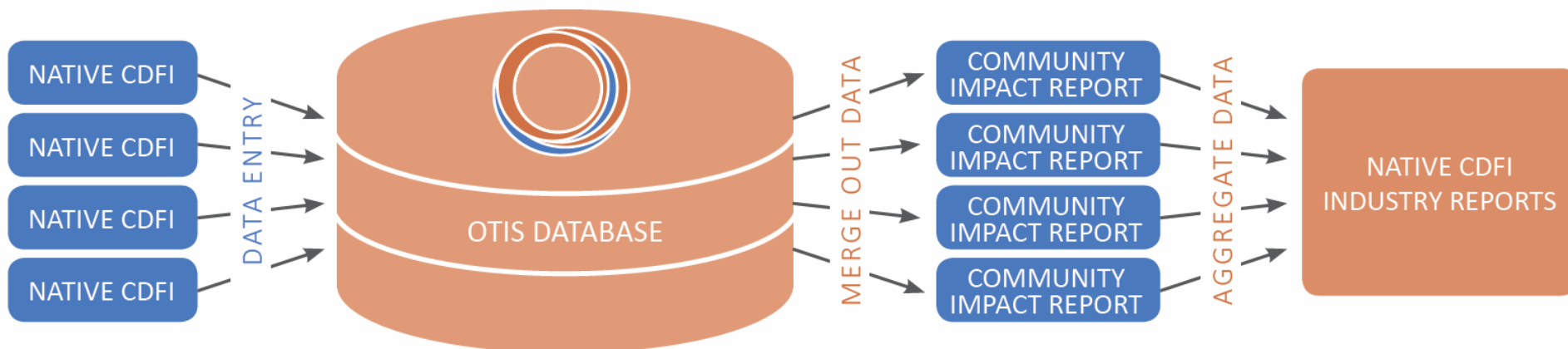


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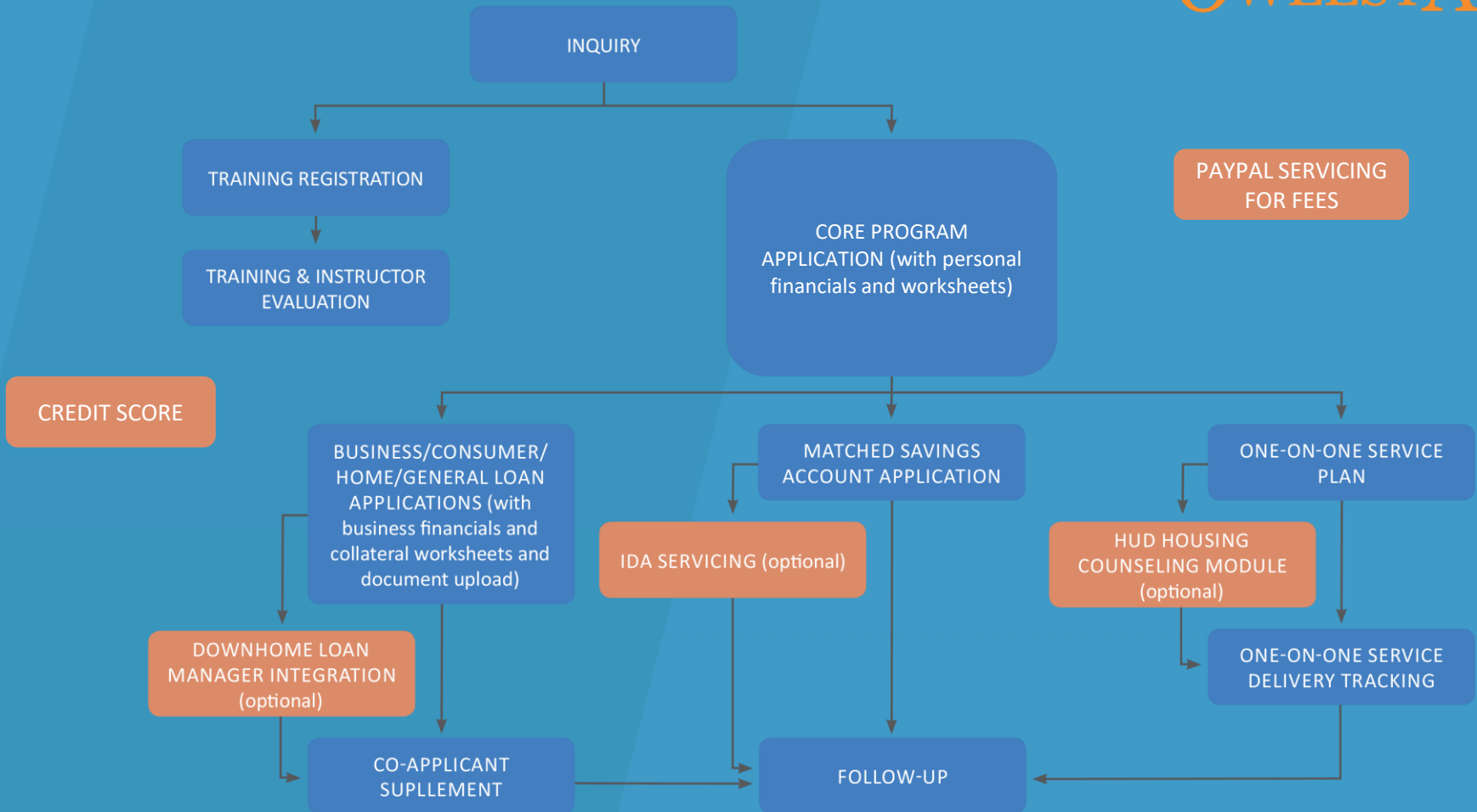
How OTIS Works



OTIS is—at its core—a series of impact tracking forms developed over the course of a year by a group of Native CDFI practitioners. These Native CDFI practitioners provided insight on what kind of information they would like to track. These forms seamlessly flow from each stage of client interaction, from inquiry to follow-up, helping you track client progress.



What does OTIS include?



What data does OTIS collect?



- **WEALTH CREATION**

- The development and increase of savings and assets including homeownership
- Improved living situation
- Business creation, expansion, and development
- Increase in or establishment of, credit scores

- **INDIVIDUAL EMPOWERMENT AND SELF-SUFFICIENCY**

- Less reliance on tribal and federal government
- The ability to access mainstream and equitable financial services

- **SOVEREIGNTY**

- New and expanded businesses
- Quality of new and expanded businesses
- Diversity of jobs
- Access to healthy foods

- **WHOLE PERSON WELLNESS**

- Financial, physical, emotional, and spiritual wellness reflected in:
 - Financial capability
 - Sense of security
 - The ability to give back to one's community
 - The ability to participate in one's community

- **7TH GENERATION TRANSFORMATION**

- The reduction of outmigration
- Increase in youth entrepreneurship and financial skills
- The revitalization and support of cultural heritage, connectedness, and cohesion

The process of OTIS



1 ORIENTATION

You will receive an introduction to OTIS and gain a thorough understanding of what kind of investments (time, money, and staff) will be required to successfully implement OTIS so that you can determine if the system is a good fit for your organization.



2 CUSTOMIZATION

Our experts will customize OTIS to fit your Native CDFI's impact tracking needs. We will build custom forms and create data queries so that you can easily generate the reports you need when you need them.



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The process of OTIS



3 TRAINING

Your staff will go through a comprehensive training process to develop internal expertise on the OTIS platform. Trainings will cover data entry, tracking, reporting, implementation, and more; and can be delivered in a traditional classroom setting or via webinar.



4 IMPLEMENTATION

You will apply the concepts learned through the training process as you begin using your customized version of OTIS to track your Native CDFI's impact. Our experts will work closely with you during the beginning phases to ensure you are on the right track.



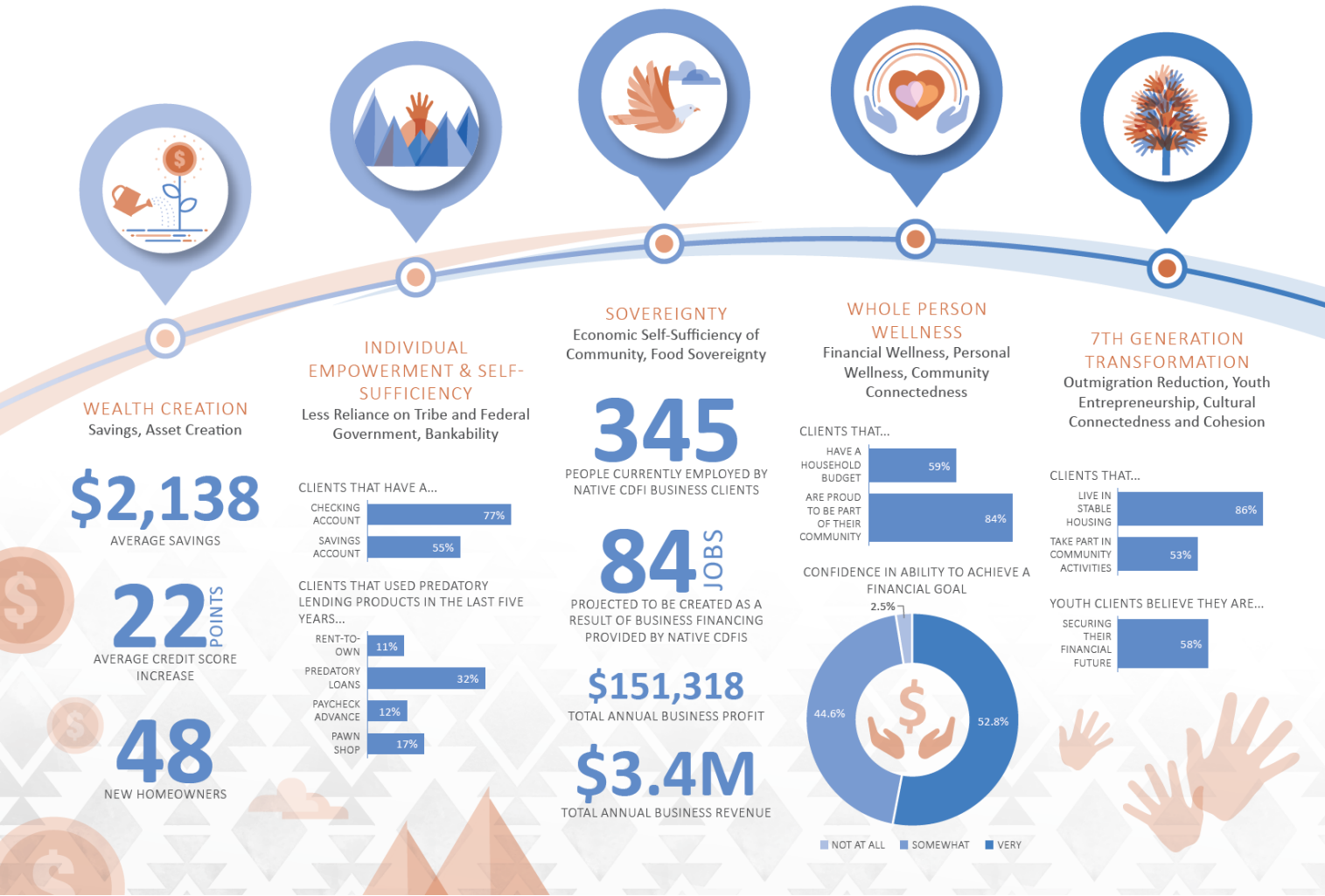
5 ON-GOING SUPPORT

You will be able to provide customer input through a series of formal reviews during your first year of implementing OTIS. After that, you can always count on our experts to help you through any issues should they arise.

The impacts of OTIS

NATIVE CDFI IMPACT TRACKING ACROSS FIVE DIMENSIONS

The information below represents data collected by 14 Native CDFIs across the nation during 2018. The organizations worked with **1,895** people, **96%** of whom were Native American, Alaska Native, or Native Hawaiian. Households of these Native CDFI clients included **3.3** people on average, and the median household income was **\$29,692**. Seventy-three percent of Native CDFI clients were employed and 8.5% were self-employed, but 21.5% were unemployed.

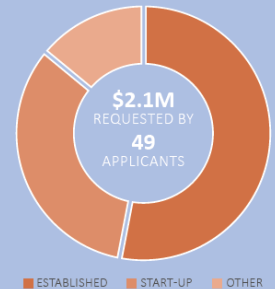


TECHNICAL ASSISTANCE

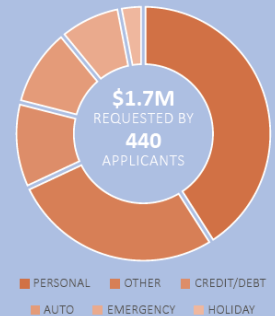
980 hours delivered to **125** clients over **738** sessions

LENDING ACTIVITY

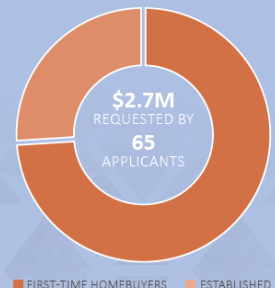
Business Loans



Consumer Loans



Home Loans



Group Discussions



1. What are you excited about in this report?
2. What do you wish was included that isn't?
3. What would you like to see done with this information?



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THANK YOU!



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