



## **2016 CDBA Social Impact Working Group Agenda**

### **Session 3: Building Impact Systems and Processes**

**Thursday April 14, 2016**

**3:00-4:00pm ET**

Conference line: 855-826-0341 (no pin)

**3:00 pm**            **Roll Call and Introductions**

**3:10 pm**            **CDFI Bank Example: Beneficial State Bank (Oakland, CA)**

*Facilitator: Jeannine Jacokes, Community Development Bankers Association*

*Facilitator: Dana Weinstein, Community Development Bankers Association*

*Bank Leader: Erin Kilmer Neel, Chief Impact Officer, Beneficial State Bank*

#### Key Questions

1. What change is your bank working to create in your community?
2. Walk us through impact data collection at your bank:
  - a. Who is responsible for impact data collection?
  - b. At what points do you collect data? (During underwriting, origination, closing, post-closing?)
  - c. What documents and systems do you use to collect, store, analyze, and report on data?
3. How do you balance collecting information with regulatory restrictions?
4. How do you balance collecting enough data to meet reporting needs, but not too much to overwhelm borrowers or bank staff?
5. What changes have you made to your systems/processes over time?
6. How do you utilize the data you collect? (Internally and externally)

**3:30 pm**            **Q&A**

We will open the floor to questions from the bank participants.

**4:00 pm**            **Adjourn**

***\*Last call on Thursday April 28<sup>th</sup> at 2pm ET – Telling Your Impact Story***