



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

### **Session 4: Telling Your Impact Story**

**Thursday April 28, 2016**

**2:00-3:00pm ET**

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

**2:00 pm**      **Roll Call and Introductions**

**2:10 pm**      **CDFI Bank Examples:**

*Facilitator: Jeannine Jacokes, Community Development Bankers Association*

*Facilitator: Dana Weinstein, Community Development Bankers Association*

*Bank Leader: Takisia Whites, President of Carver Community Development, Carver Federal Savings Bank*

*Bank Leader: Bryan Faubus, Associate Vice President, Carver Federal Savings Bank*

*Bank Leader: Roxanne DeMarco, Director of Community Partnerships, First Southwest Bank*

#### Key Questions

1. What change is your bank working to create in your community?
2. Why is telling your story important for the bank?
3. Which audiences do you tell your story to – internally and externally?
4. How do you marry quantitative data with qualitative stories?
5. What channels do you use? (print, digital, radio, social media, etc.) Any strategies for getting free or low-cost PR?
6. How do you leverage partnerships (customer testimonials?) to tell your story?
7. How do you manage expectations – tell the story of what you do and don't do?

**2:30 pm**      **Q&A**

We will open the floor to questions and sharing from the bank participants. What strategies have participants used to successfully market their banks to customers, investors, funders, and other stakeholders?

**3:00 pm**      **Adjourn**