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**2014 OFN CONFERENCE**
OCTOBER 14–17, 2014 • THE SHERATON DOWNTOWN DENVER, COLORADO

Adventures in CDFI Branding

October 17, 2014

GARFIELD

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Today's Adventure

- Introduction
- Key Industry Trends
- Panel Interview
- Questions from you

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Lina Page



Jason Anderson



Kavita Vijayan



Larry Garfield

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Now
Strategic
for CDFIs

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Digital
Marketing:
the
opportunity
we've been
waiting for

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There's a lot
we can learn.

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**Bloomberg
Philanthropies**

girls who
code



Donors Choose.org
Teachers ask. You choose.

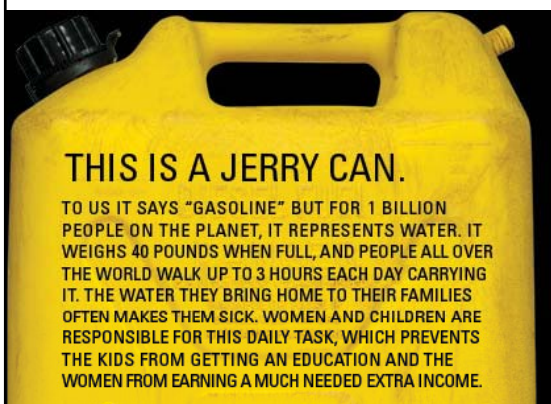


charity: water

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THIS IS A JERRY CAN.

TO US IT SAYS "GASOLINE" BUT FOR 1 BILLION PEOPLE ON THE PLANET, IT REPRESENTS WATER. IT WEIGHS 40 POUNDS WHEN FULL, AND PEOPLE ALL OVER THE WORLD WALK UP TO 3 HOURS EACH DAY CARRYING IT. THE WATER THEY BRING HOME TO THEIR FAMILIES OFTEN MAKES THEM SICK. WOMEN AND CHILDREN ARE RESPONSIBLE FOR THIS DAILY TASK, WHICH PREVENTS THE KIDS FROM GETTING AN EDUCATION AND THE WOMEN FROM EARNING A MUCH NEEDED EXTRA INCOME.



4,500
KIDS WILL
DIE TODAY
FROM WATER
RELATED
DISEASES.
HELP.

charitywater.org

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Create a world without ALS.



Since July 29, 2014, The ALS Association received \$115 million in donations.

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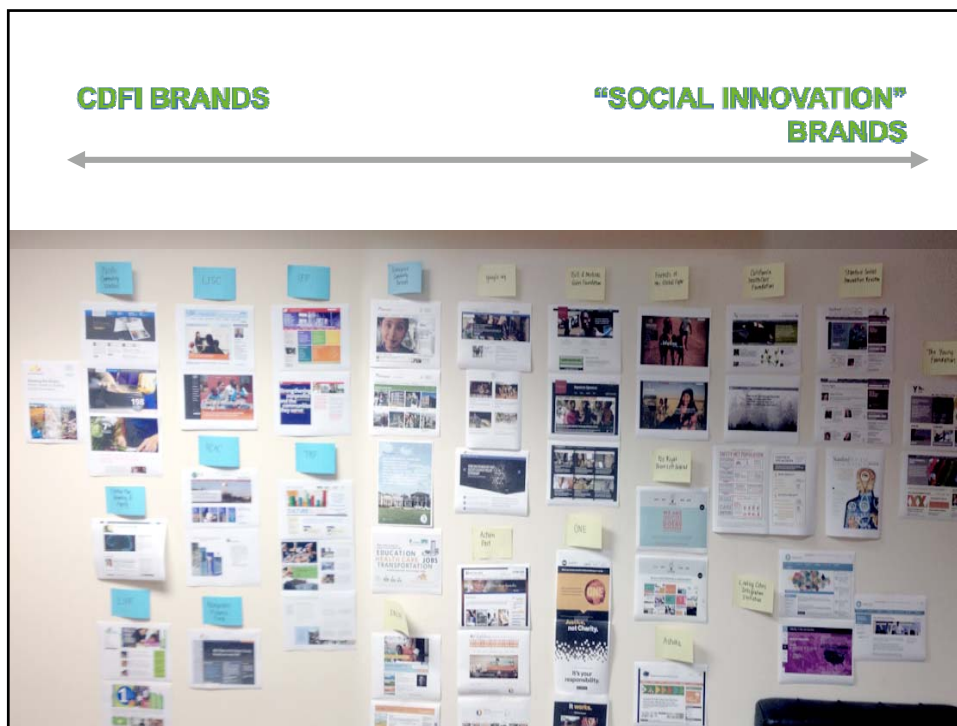
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Social Innovation Power Words



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CDFI BRANDS

- Transactions
- Traditional “banking” themes- dry and rather corporate
- Focus on output/results and less on the problems they are helping to solve
- Power Words: Community, Investment & Capital in their messaging
- “East Coast” old-school

SOCIAL INNOVATION BRANDS

- Transformation
- Human, with an emotional connection
- Focus on huge problems and disruptive ideas that are being developed to solve them
- Power Words: Innovation, Change, Ideas, Issues in their messaging
- “West Coast” Fast Company

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THE REINVESTMENT FUND

SEARCH

Impact Financing & Development Policy Expertise

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Improving access to healthy food

TRF partners on an informational portal to connect communities to resources to improve healthy food access, build local economies, and enhance public health.

[Learn more.](#)



CAPITAL AT THE POINT OF IMPACT

Featured Stories:



Reinvestment News for

News Featured Publications

TRF is pleased to be part of Bond Guarantee Program w/ @crf_usa @capitalimpact @IFCDF @LilFund <http://t.co/5X5CunEXF> @USTreasury #CDFI

20 hours ago

RT @polymap: WONK WARNING: Ever wonder how PolicyMap geo-locates the data you upload?

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**WE ALIGN CAPITAL
WITH JUSTICE.**

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CAPITAL IMPACT PARTNERS

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CREATING HEALTHY, VIBRANT COMMUNITIES

Providing capital and capabilities to help people and communities reach their highest potential at every stage of life.

TURNING POTENTIAL INTO PROGRESS

We believe every community has the potential to be a healthy, vibrant place of opportunity. We are financial and social innovators turning potential into progress in underserved communities. A non-profit organization and certified Community Development Financial Institution, we bring our roots in cooperative development, diverse network of partners and problem-solving know-how to

Opportunity Fund working capital for working people

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20 years DRIVING ECONOMIC MOBILITY

Learn Get Involved Donate Newsletter Sign-up

Driving Economic Mobility in California

\$68 Million invested in microfinance
Learn more >>

Join Us!

Be a part of California's microfinance movement. Expand

Opportunity in Action

BusinessWeek features EasyPay loans
With our EasyPay loan, BusinessWeek writes "How a Nonprofit Hopes to Eat Subprime Small Business Lenders' Lunch"
[READ ARTICLE](#)

Celebrate our 20th Anniversary
Over the past twenty years, we have helped more than 15,000 people reimagine their future. Celebrate the people and milestones that define economic mobility for two decades!

LIVING CITIES
INNOVATE • INVEST • LEAD

SEARCH

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innovative.

We take risks, catalyze fresh thinking and test new approaches in order to creatively disrupt the status quo. Read about our impact ->

Building a new urban practice.

Living Cities works with cross-sector leaders in cities to build a new type of urban practice aimed at dramatically improving the economic well-being of low-income people. We believe that these four core elements of our work are key to these ends:

Capital Innovation. We blend public, private, and philanthropic financial resources in new ways to better meet the needs of cities and their residents.

Open-Sourcing Social Change. We work at the intersections of information, people, story, and technology to accelerate the uptake of promising solutions to social problems.

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Investments for social good™

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2014 SOCIAL IMPACT REPORT

\$1 Billion for Good

Our 2014 Social Impact Report traces the journey of \$1 billion raised from investors for social good. [See the Report](#)



OUR IMPACT



Since 1995, more than 13,500 people have invested in our Community Investment Note. With their support, our portfolio

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SOCIAL IMPACT CALCULATOR



Affordable Housing

Increased food expenditures \$0
Housing as a Vaccine \$0
Discretionary Income Boost \$0
Buying Healthy Locations \$0
Subtotal\$0

Equitable TOD

Weight Loss \$0
Subtotal\$0

Early Childhood

Improvements in Adult Health \$0
Societal Benefits \$0
Subtotal\$0

Education

Increased Lifetime Earnings \$0
Societal Benefits \$0
Subtotal\$0

Health Centers

Economic Value of Community Health Centers \$0
Subtotal\$0

GRAND TOTAL\$0

Download an Excel file with your results

Welcome to the Social Impact Calculator, a first-of-its-kind tool that allows us to estimate the social impact of our investments in dollars—providing a new way to assess how effective we are in creating pathways of opportunity in low-income communities. We are pleased to present the calculator as an interactive tool for you to learn how it works, offer feedback, and use for your own purposes. [How to Use the Social Impact Calculator](#)

Affordable Housing
Equitable TOD
Early Childhood
Education
Health Centers

Increased food expenditures

Family Units^(?)
Non-Family Units^(?)
Housing Restriction Term (years)^(?)
Total^(?)

Permanent Supportive Housing as a Vaccine

Housing Restriction Term (years)^(?)
Units^(?)
Total^(?)

AFFORDABLE HOUSING SUBTOTAL

Methodology: Increased food expenditures
Methodology: Permanent Supportive Housing as a Vaccine

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PACIFIC COMMUNITY-VENTURES

ADVISING
small business advising
and resources

LOANS
investing in small
businesses

RESEARCH
Insight - providing thought
leadership and analysis

ABOUT
learn more about our team
and organization

Report of the SOCIAL IMPACT INVESTMENT TASKFORCE

Established under the UK's
presidency of the G8

GLOBAL LEARNING EXCHANGE **IIPC**
on Social Impact Investing
in collaboration with the World Economic Forum

**Social impact plus a financial
return? We could unleash \$1
trillion to transform business
and society.**

Read the **SCOWS FOUNDATION FOR
SOCIAL ENTREPRENEURSHIP** **WORLD
ECONOMIC
FORUM**

OUR MISSION

Pacific Community Ventures creates economic opportunity in low-income communities. We achieve our mission through capital, entrepreneurship, and impact investing thought leadership.

[Learn More](#)

MEET OUR COMPANIES

Over the past decade, we've helped thousands of small businesses create thousands of jobs. Our companies have shown job growth at ten times the national average, with 80% of our companies female-owned, and 56% minority-owned. Meet some of our companies!

[Learn More](#)

BLOG AND NEWS


October 07, 2014
New Blog Series: Marketing
As a small business, marketing is intimidating. Where do you start? In our new blog series, we'll provide you with the tools and resources you need to get started.

October 06, 2014
Inspiration From The 10th Annual Social Impact Summit
Last week, I had the privilege of attending the 10th Annual Social Impact Summit in New York City. I was honored to receive a Lifetime Achievement Award.

September 27, 2014
Catching Up With Petit Collage
Last year Petit Collage received \$150,000 in funding through our Business Accelerator Program. We caught up with the team to see how they're doing.

**Breaking the Binary:
Policy Guide to Scaling
Social Innovation**

In collaboration with Insight on Pacific Community Ventures, the Initiative for Responsible Investment at the Center for Research Organizations at Harvard University, and MIT Sloan School of Management, we've released a new policy guide to scaling social innovation.




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Question #1

HOW HAS YOUR JOB CHANGED OVER THE PAST FIVE YEARS?

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Question #2

OBJECTIVES, OUTCOMES AND EXPECTATIONS

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Question #3

TALK ABOUT A RECENT ADVENTURE

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Question #4

WHAT BRANDS DO YOU ADMIRE MOST?

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Question #5

WHAT KEEPS YOU UP AT NIGHT?

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Question #6

WHAT ADVICE WOULD YOU GIVE?

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Your Questions...



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Get in touch; Keep in touch.



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lgarfield@garfieldgroup.com

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Or lgarfield@garfieldgroup.com

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