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

Systematic Program Design



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Panelists and Experts

- **Krystal Langholz**, Director of Programs at First Nations Oweesta Corporation
- **Sarah Sanders**, Independent Consultant
- **David Castillo**, Executive Director at Native Home Capital
- **Tanya Fiddler**, Executive Director at Four Bands Community Fund



Program Design Model

- *Needs Assessment*
- *Planning*
- *Capitalization*
- *Evaluation Design*
- *Report Impacts*





Needs Assessment

Methods of Documenting Needs

- Advisory groups (formal and informal)
- Listening to clients
- Focus groups
- Surveys
- Listening to colleagues
- Gathering relevant statistics





Best Practices Speaker

SARAH SANDERS





Planning

Planning “Musts”:

- Take stock of your current resources and restraints
- Create goals and objectives
- Assign individuals those objective tasks
- Lay timeline for doing those tasks



Your Resources

- Potential community partners:
 - Facilities?
 - Other program delivery partners?
 - Financial supporters?
- Staff and board resources
- Community volunteers
- Other programs to integrate with



Potential Partnerships

- Cooperating Agency
- Collaborator
- Strategic Partner



Credit Union



Tribal Nations

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Can this be incorporated into existing programming?

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Your Restraints



Run Defense:

What are going to be my struggles and how can I alleviate them before they happen?





Table Conversation

- Brief Introductions
- Questions on Flipchart
- Please select someone to “record” on the flipchart and someone to “report out” at the end



Capitalization

BEFORE PROCEEDING TO NEXT STEP, ASK...



Where can I get in-kind or other creative support?

Did I include the later stages of program design (evaluation and impact reporting) in my budget?



Best Practices Speaker

DAVID CASTILLO





Evaluation Design

Ask Yourself

For whom is the evaluation?



What type of evaluation?

What resources would I need to do this kind of evaluation?

What outcomes matter to your organization?



Oweesta

- Loan Basics
- Impacts of Capital, such as:
 - Business started
 - Jobs created/retained
 - Housing units created
 - Development Services participation numbers
 - Much, much, much more...

Program Related Investment Summary

ADD PAGE BEFORE

PAGE 6 | Edit Page Options | Add Page Logic | Move | Copy | Delete | Select a page to view below or view all pages: | #6 Additional Loan Details

Additional Loan Details

Please provide information on the number of loans made to the following during this period.

+ Add Question

Q30 | Edit Question | Move | Copy | Delete

30. How many loans were previously rejected by banks or credit unions?

+ Add Question | Split Page Here

Q31 | Edit Question | Move | Copy | Delete

31. How many loans were made to start-up businesses?

+ Add Question | Split Page Here

Q32 | Edit Question | Move | Copy | Delete

32. How many loans were made to existing businesses?

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Qualitative	Quantitative
<ul style="list-style-type: none">▪ Deals with descriptions or feelings▪ Data is observed, but not easily measured▪ Gain understanding of reasons and motivation▪ To uncover prevalent trends	<ul style="list-style-type: none">▪ Measurable, numerical▪ Structured instrument (survey, etc.) is required▪ Goal to be able to generalize about larger sample size from the data that is collected
<p>EXAMPLES: interviews with participants, open ended questions on a survey, such as: “What helped you the most in your financial education class?”</p> <p>The “stories” behind your program.</p>	<p>EXAMPLES: scaled or rated questions on a survey from which you can lift statistical data on</p> <p>Numbers that communicate your outcomes, such as: “Adults that do credit builder loans with our organization improve their credit an average of 36 points”.</p>

BEFORE PROCEEDING TO NEXT STEP, ASK...



Is my evaluation method feasible financially and in-line with our organizational capacity?

How can I incorporate metrics into all my program materials, such as my intake forms?



Best Practices Speaker

TANYA FIDDLER





Report Impacts

Tell the program's success story

- Newsletters
- Annual Reports
- Website
- Grant Reports
- Facebook



Learn, Revise and Grow Your Program



Questions??



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