



Use this catalog of activities, exercises, and interventions to help your bank, credit union, or financial service organization better serve the immigrant and refugee community. Have an idea that isn't here already? We'd love to hear about it and share it with others. Send us an email at info@theprosperityagenda.org.

Activity - Empathy Exercise

Goal: Increase Community Experience

Category: Professional Development

Description: Ask your bank teller team to learn a game in another language or navigate a new system in another language – how do they go about doing it? Who do they look at as a resource in their community?

After the experience, debrief with your team: What was it like? What did it make you think about related to our banking services?

Time: 4 hours

Activity - Post-the-Process

Goal: Increase Transparency

Category: Communication

Description: Understanding a process leads to more engagement in the process. Think about when you are in line waiting for security at an airport – there are reminders and signs about preparing people for the security line. What could you do to make your bank more clear about its processes?

Walk around your bank or credit union and see where you could provide more details, more insight, more transparency to what a bank does. How can you use images to explain a process? What reminders or helpful pieces of information could you offer to customers?

Time: 5 – 6 hours of planning, 3 hours of implementation



Activity - Host a Community Listening Session

Goal: Increase Community Feedback

Category: Product development

Description: Public forums and *listening sessions* are a valuable resource in creating and maintaining open lines of communication with the public. Citizen participation in *community* services can help improve the development and utilization of products and services that are a good fit for community members. Listening sessions can also help provide invaluable feedback early on in the process when developing new products and services, while you still have time to make adjustments.

Time: 5 – 6 hours of planning, 3 hours of implementation

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