

# Catholic Charities Fort Worth Rebranding Effort Yields ‘Money School’ Initiative

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**M**otivating adults to get back into a classroom can be a difficult assignment. When the coursework is about managing finances, it can be next to impossible. Let’s face it, finances are boring for most people. Many of us try to avoid thinking about money, particularly if we’re in debt. Imagine then, trying to motivate moderate- to low-income individuals to sign up to attend a class billed as “financial education.”

That was the challenge facing a major nonprofit trying to implement a bold community initiative, and overcoming it required the assistance of an equally bold rebranding effort.

## The Assignment

In 2011, Catholic Charities Fort Worth declared it would do everything in its power to end poverty in the community. Part of that effort included a free “Financial Education and Coaching” initiative aimed at citizens earning less than \$50,000 annually. Unfortunately, in its first year, the program failed to get the attention of potential students, leaving classroom seats empty, program goals unmet and future funding at risk. Thinking a solution might be found in buying bus ads and billboards, program leaders reached out for outside creative marketing help. What they gained instead was a powerful rebranding effort and long-term strategic communications plan that helped the organization strengthen existing community partnerships and engage other organizations in the poverty-ending mission.

## The Necessary Homework

Why did the financial education initiative fail to meet its goals in the first place? The answer would require a deep dive research effort. First-year statistics were incomplete, but provided some primary, quantitative data. Primary

qualitative research began with a review of current marketing materials and also included internal stakeholder interviews, student/client testimonials and community partner surveys. Secondary qualitative research included a review of audience data from a program counterpart and existing literature and white papers from subject matter associations and foundations.

This research helped uncover the root causes of the program’s anemic performance—a lack of brand recognition and messaging not tied to audience demographics or psychographics. The literature review also revealed that the targeted audience responded to the use of humor, informal language and entertainment—techniques that were not being used in current program marketing.

Simply put, the program messaging and in particular the program name, “Financial Education & Coaching,” seemed uninspiring to prospective students and called for a more engaging identity. That is how students—and potential partners—came to know the initiative as Money School.

## Challenges Uncovered

Several challenges became key drivers in developing a strategic communications program. It became immediately clear that the initiative was not being sold from the “inside out.” Catholic Charities housed 38 different programs and services, and employees interacted on a daily basis with clients who met the criteria and would be ideal candidates for Money School, yet no referrals were being made. These key stakeholders were not being leveraged as “brand ambassadors” for the program, due to limited knowledge and a weak internal referral process.

Similarly, program leaders had not taken into account Catholic Charities’ stellar reputation in the community,

## Anatomy of a Rebranding Campaign

Developing a successful and measurable rebranding campaign becomes easier when you examine the overall project from every angle.

- Define a clear problem statement—What is broken? What problem needs to be solved? A problem well stated is a problem half solved.
- Do strong research—What do you know about the problem in general? And how does the problem pertain to your project?
- Understand the audience—Who are all of your audiences? Go beyond the end-user of your product or service. Who can help you reach those who will benefit from your offering?
- Quantify objectives—Remember, objectives are not goals. Objectives should be measurable. Think in terms of who should do what, by how much, and by when.

- Take a creative, thoughtful approach—It's easy to get inspired about communications at the early stages of a new project. Let your juices flow, but don't tie yourself down to your early creativity. When you have figured out all your needs and that of your audience, then it's time to get imaginative! That way you will have strong deliverables.

- Determine an audience-appropriate delivery—Your various audiences may very well have different communication channels. Be mindful of how they may receive information.
- Evaluate continually—Evaluate your objectives along the way. See how your program is doing at appropriate intervals. Make adjustments as needed.
- Match results with objectives—Clearly demonstrate your results by tying them back to what you hoped to achieve from the onset.

which provided enormous potential for engaging partners outside the organization.

A final challenge centered on an inability to rely or draw upon information from existing client demographics. Of the 1,015 first-year participants, 73 percent were unidentifiable by age, gender, ethnic background or annual family income. Initial program statistics, therefore, were undependable for planning or benchmarking.

### Goals, Objectives and Strategies

The primary program goal for Money School had been clearly defined within the structure of this grant-funded initiative: increase program participation and get more “butts in seats.” Establishing measurable objectives at timely intervals offered the ability to track attendance regularly to ensure the program would meet grant requirements.

The outside communication team also identified larger, more overarching goals. If leveraged fully, Money School could play a significant role in strengthening the Catholic Charities brand and supporting the organization's overarching mission to end poverty. To do that, however, Money School had to become more than a program. To truly achieve the long-term success that the client intended, it had to become a communitywide initiative

with high-value participation and shared successes.

The communication strategy, then, focused on two distinct primary audiences: potential clients/students and internal/external partners with clients who qualified for the program. Strategies tied to those audiences included:

- Making referrals a required part of the Catholic Charities system and building in employee accountabilities;
- Committing outside partner organizations to refer clients by creating a system for them to feed clients and share in the program's success; and
- Developing client-friendly materials.

### Money School Launches

With the Money School name in place, the team went about developing creative components such as the logo, fliers and Web presence with the end-users in mind. Messages targeted potential students and internal and external referral sources. Program leaders approved a plan to train employees and make referrals a required part of the Catholic Charities system. Employees received brand ambassador education and were

## Tips for getting to the head of the class

Research is never an option. It can answer questions, identify and clarify audiences, and set a baseline standard for future measurement. Regardless of budget, there is always a way to conduct research. So dig deep, push back if you must, but get answers to those nagging questions.

### Use Your Resources

The biggest mistake most organizations make is forgetting to leverage the people who already know and love them. Find your client's brand ambassadors, then educate and train them to carry the message.

### Do Extra Credit

Face it, the work you're most proud of is the project where you went above and beyond what the client "thought" he or she needed. Think past project parameters and you'll often find the most powerful and creative solutions.

### Remember You Are a Teacher

Clients know their business and you know yours. So, teach them the why, and not just what, of our business. While you're at it, educate your client about their role in the success of any communications effort.

### Earn Your Grade

Don't leave evaluation to chance. Set specific, attainable and measurable objectives at the outset. If you don't hit the marks you've set, it may be time to change strategies. Either way, you'll be demonstrating value—and that makes you an "A" student.

mitment" meetings between organization leaders. So who were the partners and how did they work? Those who signed on as partners and "brand ambassadors" received education on the initiative including statistics and success stories. They also received marketing materials that could be co-branded to help explain the program to potential students and to sign them up for classes.

As a result, Money School program leaders began to leverage internal and external brand ambassadors to find students and get them into the classroom. Rather than shout the message through a bullhorn (or bus ad or billboard) and hope it might somehow hit the right target, the plan allowed program leaders to find others to do the shouting for them—partners who could identify students who were ready to change their financial future and commit to the education offered through Money School.

## Stumbling Blocks along the Way

For many nonprofits, budgets fluctuate and program leaders come and go. Although an important initiative, Money School faced funding limits and uncertain long-term grant access. To create a sustainable platform, the creative materials needed to be simple, affordable and alterable without outside professional assistance. The brand had to be clearly defined and strategies and tactics laid out in a way that could be picked up and carried on, regardless of who might be at the helm in the future. These considerations loomed in the planning process and influenced both creative direction and client education efforts.

## Making the Grade

With clearly defined, measurable objectives in place, evaluating the Money School initiative was simple: did communication efforts accomplish the required number of "butts in seats" in the classroom?

Program leaders saw dramatic improvements in participation and program referrals by implementing the multi-tiered communication strategy that focused on rebranding the program to create a user-friendly sustainable effort, sharing success with community partners, and leveraging internal and external relationships to engage potential students.

GRADE = A: The first benchmark that 750 qualified

encouraged to attend a Money School session.

To build external partnerships, the team worked with program leaders to identify area organizations with a shared mission, delineating the WIFM (What's In It For Me) factor for any prospective partnership. The plan outlined the need for initial, high-level "com-

families complete four hours of Money School by Dec. 15, 2011, was exceeded, with 900 clients served. By the end of June 2012, results also impressively exceeded the requirement for 1,500 families, with a total of 1,965 families served.

GRADE = A: Performance exceeded requirements when ten partner organizations (three more than called for) committed to referring clients to Money School by June 2012.

GRADE = A: Results also fulfilled the requirement that Catholic Charities establish a formal process for referring internal clients to Money School by January 2012 as the organization used newly developed tools to communicate internally.

The trend of success continued into the first quarter of the following fiscal year (July 2012 to September 2012), when the program had already met more than 50 percent of a goal of 1,500 qualified clients completing four hours of Money School by the end of June 2013 with 786 families, marking a growth over the previous evaluation period.

## Next Steps

Once rebranding was complete and the strategic communications plan in motion, program leaders were encouraged to focus on improving data collection to assist in ongoing evaluation. The program's long-term success also hinged on capturing student success stories—proof that Money School served a larger organizational goal of ending poverty.

By investing the community in this initiative, one organization at a time, sharing successes and creating an army of “brand ambassadors” both internal and external, the rebranding of Catholic Charities' Financial Education initiative went beyond the program goal of filling seats in classrooms. It created a platform for community cooperation while providing the opportunity to communicate the organization's commitment to end poverty and take a leadership role in effecting long-term, meaningful change. **PRN**

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