



Catholic Charities
Community Services

Project Initiation and Identification

AZ LEADERFORCE & CATHOLIC CHARITIES

Project Identification



➤ Marketing Plan for Paths of HOPE

- Financial Education
- Getting Ahead
- Circles of HOPE

December Expectations



- Deliver a Marketing Plan that increases participation in Paths of Hope
 - Focus on Financial Education
 - Expand to include Getting Ahead and Circles of HOPE if time allows
- Implement the Plan in a test market to a targeted audience
- Review initial results

Extended Impact



- Increase participation in Paths of HOPE
- Modify the marketing plan and the program based on results
- Expand the marketing to additional locations
- Use Paths of HOPE program to refer participants into other programs consistent with participants' needs

Realistic and Achievable

➤ Agency perspective

- Realistic – Yes; it is designed specifically to align with the mission of “Helping our community's most vulnerable with solutions that permanently improve lives”.
- Achievable – Yes; requires delivery of the plan by the AZLF team

➤ AZLF perspective

- Obstacles have arisen




Sign Off & Expectations



- Agency submitted this project as the number one project
- Project received Board and Management Approval from the start
- Expectations
 - Delivery of the Plan
 - Testing of the Plan

Project Objectives

Define Products and Audience – Financial Education

Products	Youth	Adults	Seniors
Money 101			
Get out of Debt; Stay out of Debt			
Retirement's Special Needs			

Anticipated Outcomes



- Increase participation in Financial Education, which should...
- Increase participation in Getting Ahead, which allows us to ...
- Track participants through Circles of Hope
 - Achievement of Participant's Goals
 - Value of Program
 - Effectiveness of Program

Deliverables and Project Timeline



Deliverable	Timeline
Define the Audiences – who has these needs?	August
Define Target Geographic Markets – where are they?	August
Create Messages for each Audience in a given market – what is the value proposition? What's the form of the message?	September
Distribute Message - take it for a test drive	October
Analyze results – did it work?	December
Tweak as Needed	Ongoing

Team Building

➤ Things We can do Better

- Keep from losing more team members
- Collaborate with AZLF members from other teams who have marketing experience