



## Background and Program Overview

Gesa's High School Credit Union program is a learning cooperative, partnering with local school districts to provide hands-on, real-life financial industry experience to local high school students. Currently located in eight high schools within three school districts, the student-ran campus branches open during lunch periods and enable the school's student body and staff to access their accounts or perform basic account transactions in a realistic credit union atmosphere.

Students are hand-selected for each branch. Depending on the high school's curriculum, the branches are operated through the Accounting, Financial Services, or DECA programs. Teachers from each school guide the students in class throughout the year, with the support of their Campus Branch Managers and Gesa's Education & Outreach Specialist.

Going into the 2013-2014 school year Gesa made the decision to revise the operation model, and empower our Campus Branches to be truly student-ran. In previous years, the High School Campus Branches heavily relied upon branch support. Gesa staff would report to their assigned high school and were responsible for branch operation, with the assistance of high students.

To transform this vision into reality, the Education & Outreach team revamped the Campus Branch and introduced two newly created positions; Student Tellers and the Campus Branch Manager.

### Student Tellers

The Campus Branch Student Tellers act under direct supervision of the Campus Branch Manager and Education & Outreach Specialist. Students will work in their school's Credit Union as a part of a class or Work Based Learning agreement. These students are fully trained to support the transactions authorized for the campus branches and adhere to the same service standards required by all Gesa Credit Union.

#### Student Teller Responsibilities:

- Attend Student Teller Training provided by Gesa's Education & Outreach Department.
- Follow the direction and guidance of the Campus Branch Manager.
- Adhere to Gesa Credit Union Campus Branch policies and procedures.
- Work scheduled shifts in their school's Campus Branch.
- Participate in financial literacy and development classroom curriculum.
- Actively participate in Campus Branch Marketing projects and events.

### Campus Branch Managers (Student Interns)

The implementation of the Campus Branch Manager position transformed Gesa's program into a true student-ran operation. A Campus Branch Manager is selected through a formal interview process to become a Work Based Learning Intern. These high-potential students intern as Tellers in Gesa branches and assume the supervisory role of Campus Branch Manager at their school's Campus Branch. In the branches, Interns are fully trained as Tellers gaining beneficial member service skills, cash handling experience, and financial industry knowledge. In their high school Campus Branch, they lead and

supervise the student tellers through opening/closing procedures, transactions and branch marketing operations. Full job duties include:

**Campus Branch Manager Functions:**

- Open high school campus branch following the defined opening procedures.
- Supervise Student Tellers assisting members with their basic financial transactions.
- Assist Student Tellers with balancing of cashbox and close campus branch following the defined closing procedures.
- Ensure high school campus branch is stocked with all necessary supplies and cash needed to support daily operations and inform the Education & Outreach Specialists when reorders are needed.
- Transport campus branch daily work to assigned branch and process using defined procedures.

**Training/Campaign Objective**

With a new Operational Model in place Gesa’s Board of Directors specific goals for our Campus Branches to achieve. The goals established by Gesa’s Board of Directors include:

<b>Students Accounts Opened</b>	<b>Avg. Daily Balance of Accounts</b>	<b>Percentage of Accounts w/ Debit Cards</b>	<b>Avg. Number of Daily Branch Transactions</b>	<b>Students Reached Through Financial Education</b>
<b>380 New Accounts</b>	<b>\$107.85</b>	<b>71.3%</b>	<b>2.90 Transactions Daily</b>	<b>658 Students</b>

Gesa’s Education and Outreach team created an innovative way for students in the High School Campus Branch Program to help Gesa meet the established goals—The Campus Branch Challenge and corresponding month-long marketing campaign.

Our objective was to engage and empower our students to meet these assigned goals by way of their own marketing campaign. Each Campus Branch was tasked with creating and presenting a marketing campaign concept at the annual Campus Branch Challenge. Students had complete autonomy with their campaign concepts, as long as it met the following objectives:

- Generate financial literacy awareness;
- Expand the membership base within their schools;
- Instill savings habits by increasing the average number of daily transactions performed at their campus branch.
- Create awareness of the Campus Branch’s products and services.



To prepare our credit union students, Gesa's Education & Outreach team held individual training sessions with all eight campus branches. These instructor led facilitation sessions equipped students with the basic strategies involved with creating and implementing a dynamic marketing campaign. The 'Creating a Successful Marketing Campaign' training topics included:

- What is a marketing campaign?
- How do they differ from a marketing concept?
- Common vocabulary.
- Tips for creating a successful campaign.
- Previous Gesa Marketing Campaign Evaluation.

### **The Campus Branch Challenge**

Hosted by Gesa's Education & Outreach Specialist, Brandon Allison, the Campus Branch Challenge is a game-show themed night held at the Three Rivers Convention Center. Students from each Campus Branch had the spotlight to present their campaign concepts and play real-life game show games in between presentations. Over 80 students, 9 teachers, 5 school district officials, and dozens of Gesa Employees took part in the evening's festivities.

Campus Branch Students came dressed in the school spirit attire and ready to compete for the title of Campus Branch Challenge Champions. The evening kicked-off with a dynamic introduction video leading into Minute to Win It, Name That Tune, and Family Feud games. Prizes were awarded to each school if their school's representative won a specific game show challenge.

***Note: See folder named Campus Branch Challenge in attached flash drive for the opening video, pictures of the event, and a video recapping the evening.***

Gesa's Marketing Department was in the audience acting as the guest judges, ready to select a winner and crown the 2015 Campus Branch Challenge Champions. All eight schools presented quality campaign concepts, but with their 'Catch the Gesa Save Wave' concept the students of the Hanford High School Campus Branch were declared the 2015 Campus Branch Challenge Champions. The Hanford High students took the trophy back to their Campus Branch and were awarded the learning opportunity of working with our Marketing Department to transform their campaign concept into a tangible marketing campaign.



## The 'Catch the Gesa Save Wave' Marketing Campaign

Over the course of the next two months the students of Hanford High School worked closely with our Marketing Department and Education Specialist to turn their campaign concept into a dynamic marketing campaign to be implemented at eight of Gesa's Campus Branches.

First, these students were assigned a budget to work within. This budget was for all campaign collateral, weekly/grand prizes, branch decorations and any additional supplies needed for campaign activities. Next, the Hanford High Students determined how they were going to operate the campaign to align with Gesa's assigned goals for the program. These students then worked with Gesa's Campaign Specialist to connect the goals of the campaign with their ideas and bring their campaign to life. The Hanford High School students decided on the following:

- **Name:** Catch the Gesa Save Wave
- **Timeframe:** February 1<sup>st</sup> through February 29<sup>th</sup>, 2016
- **Weekly Prizes:** selfie sticks, portable phone chargers, sunglasses and surfboard key chains.
- **Grand Prize:** Each school to award 1 iPad Mini.
- **How to Win:** Perform a transaction at your campus branch, open a new student savings/checking account, and share savings tips with your peers using #GesaSaveWave.
  - **Perform a transaction-** Students who utilize the services of their Campus Branch would be entered into a weekly drawing for a Gesa Selfie Stick and be entered into their school's grand prize drawing.
  - **Open a new student account-** students who open a new student account would automatically receive a Gesa branded portable phone charger and be entered into their school's grand prize drawing.
  - **#GesaSaveWave-** The students also created this hashtag for Twitter and Instagram. Students who took a picture of themselves saving money, or posted/shared a way they save money using #GesaSaveWave were entered into their school's weekly drawing for a Gesa branded selfie-stick.

The Hanford High School students then worked with our design team to create the campaign collateral to be distributed at all Campus Branches for the campaign. Gesa's design team walked them through the creation of campaign collateral; choosing color schemes and poster/take one formats. The Hanford High School Campus Branch Students ultimately became the 'faces' of the campaign, and took part in a photoshoot to be on all pieces of collateral.

**Note: Please see the campaign collateral folder on the attached flash drive for images of all campaign collateral, campaign take-one also included in submission.**



## Campaign Implementation

Once the 'Catch the Gesa Save Wave' campaign was created, Gesa's Education & Outreach Specialist Brandon Allison then held individual training sessions with each High School Campus Branch class. These trainings sessions were designed to educate the students on:

- How the campaign was going to operate.
- What prizes members could win.
- How members could win prizes.
- Review their budget for campus branch decorations and campaign activities.
- Plan events within the schools to correspond with the campaign.

In addition, students were instructed they could also win prizes for their achievements during the 'Catch the Gesa Save Wave' campaign. Each Campus Branch was competing for one of three weekly surfboards for:

- Most Average Number of Transactions.
- Most New Accounts Opened.
- Most Social Media Engagement.

## Campaign Results

The month-long 'Catch the Gesa Save' Campus Branch marketing campaign was wildly successful, shattering all assigned goals and record breaking engagement with Gesa's social media accounts.

### Goals vs. Results

Through the implementation of the 'Catch the Gesa Save Wave' marketing campaign Gesa's Campus Branches shattered their assigned goals for the 2015-2016 school year. Goals vs. results are:

### Goals

Students Accounts Opened	Avg. Daily Balance of Accounts	Percentage of Accounts w/ Debit Cards	Avg. Number of Daily Branch Transactions	Students Taught Through Financial Education
<b>600 New Accounts</b>	<b>\$125.00</b>	<b>&gt; 70.0%</b>	<b>3.90 Transactions Daily</b>	<b>1000 Students Taught</b>

### Results

Students Accounts Opened	Avg. Daily Balance of Accounts	Percentage of Accounts w/ Debit Cards	Avg. Number of Daily Branch Transactions	Students Taught Through Financial Education
<b>1,663 New Accounts</b>	<b>\$139.80</b>	<b>82.4%</b>	<b>12.21 Transactions Daily</b>	<b>2,593 Students Taught</b>

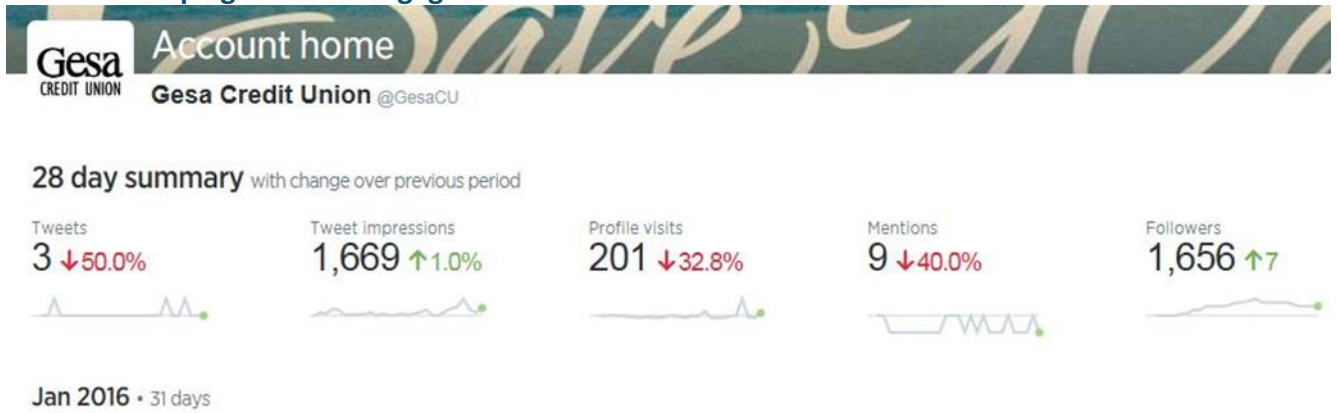


## Social Media

The #GesaSaveWave took on a life of its own through Twitter and Instagram— posting over 1,000 savings tips and pictures. Students throughout the community really embraced the #GesaSaveWave and social media challenge. The student body from eight different schools posted their best savings tips and/or pictures of them saving money on daily basis. #GesaSaveWave ultimately became a way for thousands of students in eight schools and three school districts to collectively share ways they save money and that’s an extremely powerful message.

The impact to our social media accounts were astounding, see our Twitter engagement results:

### Start of Campaign Twitter Engagement:



### End of Campaign Twitter Engagement:



**Note:** Please see examples of tweets students posted in the attached flash drive, and all tweets can still be seen on Twitter by searching #GesaSaveWave.



The 'Catch the Gesa Save Wave' was the most successful campaign in the history of Gesa's High School Campus Branch Operation—a recap of results include:

- Exceeding the new accounts goal by 277%.
- Increasing the average balance of student accounts by 111%.
- Exceeding the goal of average number of daily transactions by 313%.
- Exceeding the goal of students reached through financial literacy by 162%.
  - **Note:** *this does not include social media tips, only classroom education by Brandon Allison or Campus Branch Students.*
- Increasing Twitter impression and social media engagement by 581%.

Overall, the 'Catch the Gesa Save Wave' campaign was a monumental success- completely designed and implemented by the student of our High School Campus Branch Program resulting from the creating of the High School Campus Branch Challenge.

