



Lessons learned in sharing
marketing, communications and
development strategies

Jennifer M. Trefelner APR, CPRC
Director of Communications and
Development, Diocese of Palm Beach



**Catholic Leadership
Summit 2023 (CLS)**
Raleigh, NC • #NCEACLS

Welcome



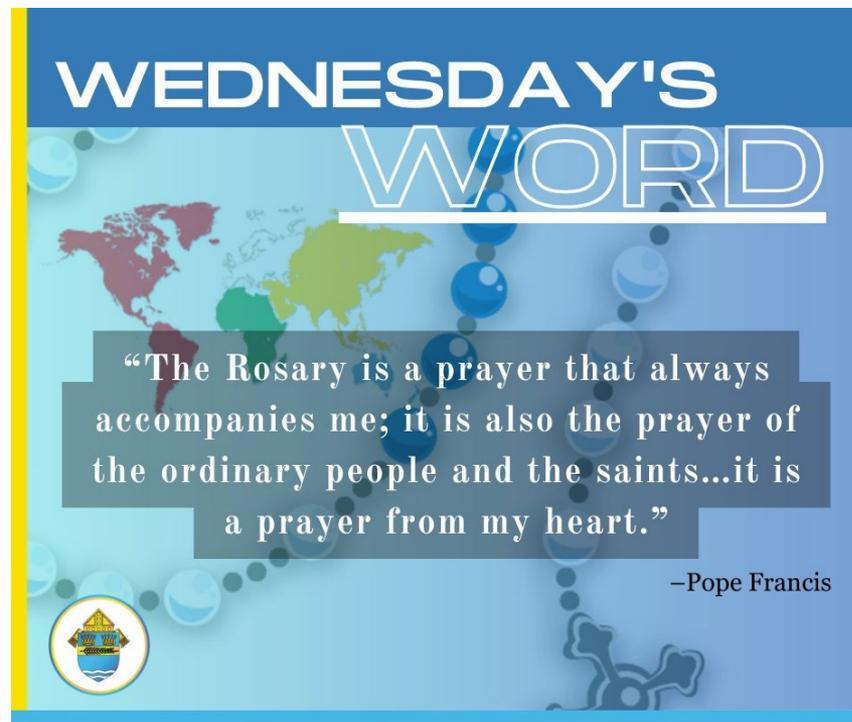
- Prayer
- Follow Diocese of Palm Beach, Office of Catholic Schools @DoPBCatholicSch
- Follow Jennifer Trefelner on LinkedIn and X

Session Description

Provide tangible lessons on the best way to share marketing, communication and development strategies from the diocesan level to school leaders

Explain five ideas that have worked for:

- Communication/enrollment/marketing staff
- AND
- Presidents/Principals/ APs



WEDNESDAY'S
WORD

“The Rosary is a prayer that always accompanies me; it is also the prayer of the ordinary people and the saints...it is a prayer from my heart.”

–Pope Francis



Session Objectives



- Explain what tools can be used to create diocesan templates that can be personalized by parishes and schools
- Showcase examples of platforms to share content digitally from diocesan leaders to those under their umbrella
- Show how establishing quarterly parish and school communication meetings helped a diocese become successful in teaching key stakeholders best practices in marketing, advancement, enrollment, etc.

Session Information



- This session is about building connections with school and parish communication/marketing staff and inspiring them to share content while creating buy-in, which will sustain commitments from this key group of stakeholders

- This session will challenge you to use new skills, all while inspiring them to promote a common mission

- Help share ways for you to tell your story about your school, diocese and/or organization



Jennifer M. Trefelner APR, CPRC



- Presented at NCEA/CLS/Regional meetings 16 times
- Member of NCEA NNC Committee
- Accreditation in Public Relations, Certified Public Relations Counselor through FPRA
- Crisis Communication Certification through Public Relations Society of America
- HarvardX edX Exercising Leadership: Foundational Principals Certificate
- Director of Communications and Development
- Previous Director of Communications, Marketing, and Social Media for the Diocese of Palm Beach
- Previous Director of Institutional Advancement at John Carroll High School for 15 years
- Previous Online Communications Consultant for the Office of Catholic Schools, Diocese of Palm Beach

About today's presenter



- Graduate of John Carroll High School
- Married to Joey for 22 years
- Olivia Grace, 16-years-old
- Edwin, 23- years-old
- Volunteer for PRSA, FPRA, Catholic Charities
- Celebrated 20th anniversary working for our diocese this month!

Getting to know you...

- Take out your phone
- Go to [menti.com](https://www.menti.com)
- Type this code: 8742 9050



How does your Office of Catholic Schools/ Diocesan Office of COmmunications share content with schools?



Poll created by speaker, Jennifer M. Trefelner
APR, CPRC

Your answer:

Poll Results

- Newsletter
- N/A
- We use email, google drive, and social media depending on the media we are sharing.
- Google Drive
- Weekly newsletter email
- Weekly newsletter and monthly zoom
- Biweekly newsletter and monthly regional meetings
- Email, video, Flocknote
- Newsletters through Constant Contact, quick messages through email.
- The most frequent mode of communication is through email.
- We are going to create a website that only our staff can access
- weekly updates email newsletter
- Email updates and regular system level PD days for both teachers and leaders
- Email and Principal Meetings
- Email
- By emails or virtual mtg. We have annual calendar w/ important dates & deadlines w/ calendar appts
- Through Basecamp, newsletters, general principal meetings
- The DOC meets with during all principal meetings.
- Through a google group.
- Mailchimp - monthly newsletter
- We have a Monday Memo that goes out to schools each week.
- We use Flock-note and email.
- LMS platform called Schoology as well as weekly announcements sent to principals.
- Weekly communication
- No
- Reports
- Bi-weekly newsletter to principals, monthly newsletter to teachers and regular principal meetings
- Weekly email to principals and pastors. Social media page specific go schools.
- Weekly Newsletter

Notes from survey...

- Lots of emails from OCS to schools
- DOC meeting with Principals
- Website to share content...
- Basecamp (project management platform) and Schoology (learning management tool)



Catholic Leadership Summit and New Superintendents Academy 2023

Poll question
Who in your diocese provides marketing templates for your schools?

My response

Member of OCS staff dedicated to ...



We do not have anyone to assist with this



Superintendent



Diocesan communications office



Powered by Whova



My goals for this presentation

- Be intentional
- Provide take-aways
- Help you think of how to apply this to your school, diocese, organization
- Serve as a resource of what we have learned from trial and error



Five ideas that have worked with school communication/enrollment/marketing staff

1. Ghost website
2. Quarterly meetings for school communication/enrollment/marketing staff
3. Templates that can be personalized
4. Teach the teacher mentality
5. Surveys... and doing what the schools suggest



Five ideas that have worked with school administrators (Presidents, Principals, APs)



1. Organized annual theme for consistency
2. Umbrella of communication from OCS/DPB to schools
3. Sharing information at President/Principal's meeting
4. Providing opportunities for collaboration
5. Being available for crisis communications

What hasn't worked

FLORIDA Catholic

PALM BEACH DIOCESE

GET TO KNOW OUR DIOCESAN PRINCIPALS

All Saints principal loves science

This is Part 1 of an ongoing series of articles spotlighting the principals who are leading Catholic schools in the Diocese of Palm Beach.

WILLIAM CONE
of the Florida Catholic staff

JUPITER | Being an educator is Jill Broz's second career, but even her first career was involved with schools – of fish, that is. After earning an undergraduate degree from McGill University in Montreal, Canada, and a master's in marine biology from Memorial University in Newfoundland, she worked several years for the Canadian government on fish stocks, management and technology.

"One of the parts I always loved about my career in marine biology was helping those learn how to do things. So, I think I've always been a natural teacher and educator," said Broz, who just began her 11th year as principal of All Saints School in Jupiter.

Her job in Newfoundland was teaching commercial cod fishermen to farm fish, raising undersized cod in sea pens until they are ready to harvest. Being a young woman, trying to educate older, more experienced men to become farmers, was "intriguing," she said.

"They tested me. Like when I'd go on the outboard engine, and they'd take out snail



A highlight for Jill Broz every year is the eighth-grade graduation, when students and families celebrate their moving on to high school. (COURTESY PHOTOS)

school, so there are six parishes that support us," Broz said. "I have a board of six pastors that makes decisions."

One of those six pastors, Father Donald Finney of St. Peter Parish in Jupiter, serves as pastor moderator, or lead pastor, for the school. He calls Broz a tireless worker dedicated to All Saints' students.

"She's out there in the morning greeting all the students, so they come to school," he said.



- Principal profiles
- Asking schools to support other fundraisers besides their own
- Password protected websites
- Barriers in communication with gate keepers
- Emails with no action plan or muddy text

Five ideas that have worked with school communication/enrollment/marketing staff

1. Ghost website
2. Quarterly meetings for school communication/enrollment/marketing staff
3. Templates that can be personalized
4. Teach the teacher mentality
5. Surveys... and doing what the schools suggest



#1 Ghost website

Catholic School Resources

Serving You in 2023

The Mission of the Catholic Schools of the Diocese of Palm Beach is to build learning communities, based on the Gospel message of Jesus Christ and rich in Catholic values and tradition. The schools have a commitment and responsibility to teach the "whole child" in mind, body, and spirit. In developing the gifts, talents, and uniqueness of their students, the schools seek to prepare leaders and Christian stewards as a beacon of hope for the Church of the future.

Enjoy these 2023-2024 resources for the schools within the Diocese of Palm Beach. If you have any questions or need additional resources, please contact Communications@DiocesePB.org.

Visit <https://www.diocesepb.org/ministries/offices/offices/communications/parish-bulletin-editors-communication-staff.html> for additional information from the Office of Communications. The information on this link is updated each month and includes sections on safe environments, events, feast days, and notable events, in addition to office and ministry updates, plus communication resources?

AREAS OF INTEREST



- URL link open to the public, but not navigable from the OCS/Diocesan website
- Example: www.DiocesePBSchools.org/Resource.s.html
- Landing page for school administrators, communication staff, etc. to glean content
- Send URL to school administrators on a regular basis
- Update information and organize into blocks for easy viewing

#2 Quarterly meetings for school communication/enrollment/marketing staff



- Create eye-catching flyer, take RSVPs, make agenda, follow up survey
- Allow for time to network, provide snacks
- Can combine with parish communication meetings or have separately
- Peer-to-peer teaching
- Topics have included: updates from our lawyers, enrollment trends, social media tips/tricks, resources available, how to use/ take better photos/videos, history of the diocese, planned giving, round table discussion, legislative updates, etc.

#3 Templates that can be personalized

- Create templates in Canva, Publisher, Adobe, etc., for schools to use
- Provide the elements for placement and an example of a final look
- Email for content to drop into a template
- Example: Legacy initiative has elements that can be overlaid and include additional images
- Example: 4 Key Facts you need to know
- These templates allow schools to personalize information easily and quickly



“ 4 Key Facts you need to know about St. Joseph Catholic School ”

Moral/Spiritual Development
The Eucharist is central to all activities at St. Joseph's. Weekly school mass, access to the sacraments, opportunities for service to others, and the daily example of faith lived and modeled by our religious sisters and entire faculty, fosters an environment where students seek to grow closer to Christ in all their endeavors.

Strong Academics
We provide an adaptive learning environment where students are challenged to reach their academic potential by means of hands-on projects and traditional instructional methods, while integrating classroom technology and individual devices into the curriculum.

Holistic Education
St. Joseph's educates the whole student: body, mind, and spirit. Our faith based academic model, coupled with after school options such as STEAM club, drama club, and the many athletic programs we offer, strives to form intelligent and virtuous members of our community.

Individualized Attention
Individualized attention is provided by our highly qualified and caring staff in a small school environment, which allows us to support each student along their academic journey from Pre-K 3 to 8th grade.

772.287.6975

St. Joseph Catholic School
1200 E. 10th Street
Stuart, FL 34996
admission@sjscf.org
<https://sjschargers.com/>

@stjosephcatholicstuart
@saintjosephchargers
@SJCChargers

#4 Teach the teacher mentality



- Work with communications/enrollment/advancement staff to understand best practices so that they can share it with their teams on campus
- Examples: Social media ambassadors, how to tell stories about their school using a set up, problem, action and result (SPAR), which technology tools are helpful (Canva, Vimeo, Veed, PicPlayPost, Videoscribe), resources for an annual fund, how to take high quality photos, etc.

#5 Surveys... and doing what the schools suggest

- At every meeting, ask how the school communication/enrollment/advancement staff want to receive information, how they share information, which diocesan social media sites they follow, what was helpful from the meeting, what did they want to learn about that they didn't, what they want to hear about at the next meeting, what they actually need to be more successful, plus information you honestly want to know (do they have a plan for a waiting list, how do they welcome new families to their schools, how do they collect data from their families)

- Then respond accordingly...

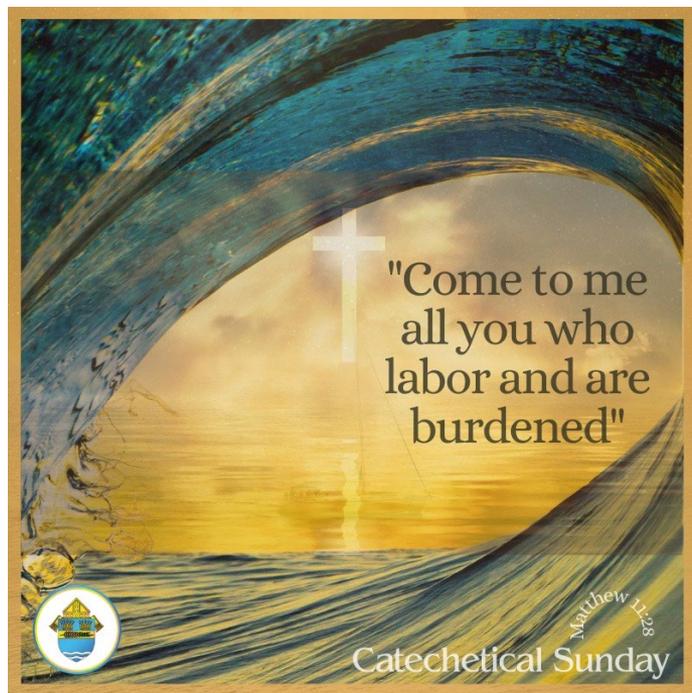
Communications/Marketing
Enrollment/Advancement

Strategy
Survey
08/31

1. Name: _____ School: _____
2. Roles and responsibilities:
3. Does your school have a Facebook, Instagram or Twitter page? If so, what are the handles?
4. What communication tools do you use with your school community (ex: emails from homeroom parents, e-newsletters, Principal newsletter, school app, push notifications, texting)?
5. Which of the diocesan social media pages do you follow? (circle all that apply)
 - a. Diocese of Ft. Lauderdale Facebook page?
 - b. Office of Catholic Schools Instagram page?
 - c. Diocese of Ft. Lauderdale Family Life Facebook page?
 - d. Palm Beach Vocations Facebook page?
 - e. Catholic Charities Palm Beach Facebook page?
 - f. Diocesis de Palm Beach-Pastoral Hispana Facebook page?
 - g. Our Lady Queen of Peace Cemetery of the Palm Beaches Facebook page?
 - h. Office of Catholic Schools Instagram page?
 - i. Office of Vocations Instagram page?
 - j. Office of Catholic Schools Twitter page?
6. What was most helpful from today's meeting and what would you like to learn more about at future meetings? Please share with us which presenters were the most informative and why.



Five ideas that have worked with school administrators (Presidents, Principals, APs)



1. Organized annual theme for consistency
2. Umbrella of communication from OCS/Diocese to schools
3. Sharing information at President/Principal meeting
4. Providing opportunities for collaboration
5. Being available for crisis communications

#1 Organized Annual Theme for Consistency



- Multimedia package for schools which includes: video, graphics, zip drive of high-resolution graphics, marketing messages
- Translate materials into other languages
- Explanation, main theme, tag lines, sub messaging and proof points
- Set messaging from data reflecting upon why families chose Catholic schools in your diocese
- <https://vimeo.com/845088105>

#2 Umbrella of communication from OCS/Diocese to schools

- All Presidents/Principals/APs email list
- Goal is to be on the same page at the DPB/OCS level, then email school administrators, for them to share content with their staff
- Don't assume you know who your school admins may include
- Close the loop or ask for verification or receipt
- Send email with expectation it will be forwarded

Catholic Leadership Summit 2023 (CLS)
Raleigh, NC • #NCEACLS



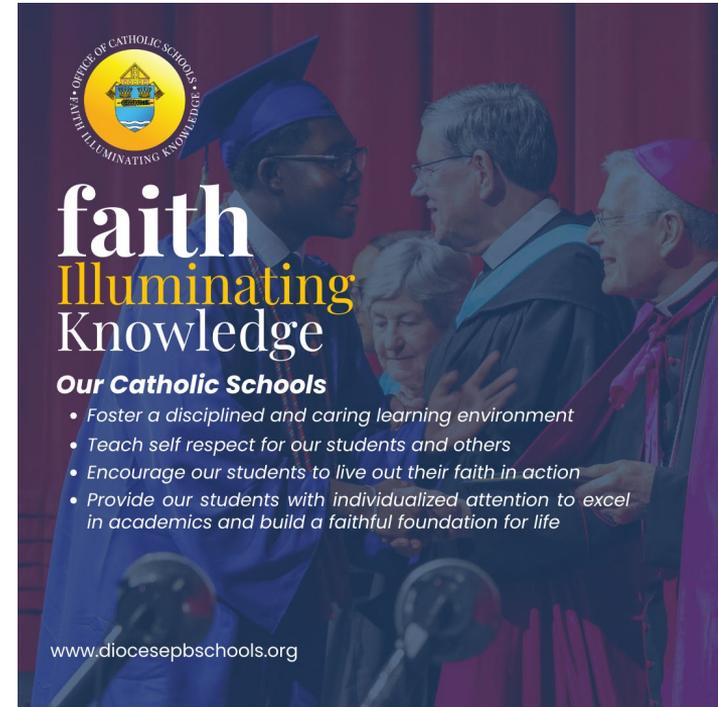
#3 Sharing information at President/Principal Meeting



- Attend President/Principal meetings and give brief overview of OCS/Diocese efforts regarding marketing/communication/advancement
- Explain the rationale and create buy-in
- Provide examples of easy implementation
- Show actual sites and specific request
- Follow up with an email with live links

#4 Providing opportunities for collaboration

- Support Presidents, Principals, and Assistant Principals by providing a meeting space and invitation to groups within their schools
- By sharing best practices and organizing an agenda, the OCS/ Diocese can support the school administrators
- Example: High school enrollment/advancement staff meeting



#5 Being available for crises communications

- Create templates for various crises and share with school administrators for them to personalize
- Serve as the point of contact in any scenario in which a school administrator needs to contact the police, DCF, communicate with families, have their SRO investigate a situation, etc.
- Examples: inclement weather, lock down drill, stranger danger, etc.
- Create action plan for schools



Crisis Communication Team and Communication Procedures for Emergencies:

Please share this information with the administration team to ensure that all know the proper protocol.

1. School Administrator calls 911
2. School Administrator calls School Resource Officer/Security Guard (if applicable)
3. School Administrator calls/texts Superintendent of Schools and Pastor
4. Superintendent texts Director of Communications, Assistant Superintendent and Diocese Site Safety & Security Advisor
5. Superintendent texts Vicar General, Chancellor, Pastor and Risk Management Officer
6. Director of Communications drafts initial text for school to disseminate to parents and emails School Administrator, Superintendent, Assistant Superintendent and Diocese Site Safety & Security Advisor
7. Changes to draft text are emailed back to Director of Communications and made accordingly
8. Director of Communications emails approved text to School Administrator, Vicar General, Chancellor, Pastor, Risk Management Officer, Superintendent, Assistant Superintendent and Diocese Site Safety & Security Advisor
9. School Administrator notifies Director of Communications, Assistant Superintendent and Diocese Site Safety & Security Advisor what text has been shared
10. School Administrator notifies the Superintendent that the crisis has been resolved
11. Superintendent texts Director of Communications, Assistant Superintendent and Diocese Site Safety & Security Advisor with update
12. Director of Communications drafts initial text for school to disseminate to parents, stakeholders, and media and emails School Administrator, Superintendent, Assistant Superintendent and Diocese Site Safety & Security Advisor
13. Changes to draft text are emailed back to Director of Communications and made accordingly
14. Director of Communications emails approved text to School Administrator, Vicar General, Chancellor, Pastor, Risk Management Officer, Superintendent, Assistant Superintendent and Diocese Site Safety & Security Advisor
15. All media requests are sent to Director of Communications

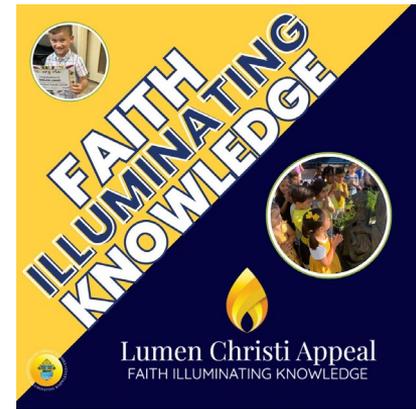
Take-aways

FOR SCHOOL COMMS STAFF

1. Ghost website
2. Quarterly meetings for school communication/enrollment/marketing staff
3. Templates that can be personalized
4. Teach the teacher mentality
5. Surveys... and doing what the schools suggest

FOR SCHOOL ADMINS

1. Organized annual theme for consistency
2. Umbrella of communication from OCS/DPB to schools
3. Sharing information at President/Principal's meeting
4. Providing opportunities for collaboration
5. Being available for crisis communications



RECAP of my goals for this presentation



- Be intentional
- Provide take-aways
- Help you think of how to apply this to your school, diocese, organization
- Serve as a resource of what we have learned from trial and error
- Happy to provide this PowerPoint, link to the OCS link I mentioned, and the DPB communications link (includes additional resources)



Save the date!

NCEA
2024
APRIL 2-4
PITTSBURGH

National Catholic
Educational Association

2024 CONVENTION

April 2-4 | Pittsburgh, PA

David L. Lawrence Convention Center

www.NCEA.org

Evaluate This Session





200 North Glebe Rd., Suite 310
Arlington, VA 22203
800.711.6232
www.NCEA.org