Case Study: Medium-Sized Regional Bank

# From One-Off Sessions to Scalable Community Impact

A Texas-based regional bank with approximately $5.5 billion in assets and a strong commitment to financial inclusion and community development has transformed how it delivers financial education across the communities it serves. Focused on supporting low- to moderate-income (LMI) individuals and other underserved populations, the bank recognized that financial education plays a critical role in helping individuals build long-term financial stability. Using Everfi Engage, the bank expanded its ability to deliver in-person financial education at scale, creating a more sustainable and community-driven approach to outreach.

## THE CHALLENGE: Scaling Community Financial Education

Prior to implementing Everfi Engage, the bank was actively delivering financial education through workshops hosted at churches, nonprofit organizations, shelters, community centers, and other trusted community locations. These programs addressed real-world financial topics such as credit management, avoiding predatory lending, budgeting, fraud prevention, and preparing for major financial milestones.

While demand for these programs continued to grow, the bank's approach was difficult to scale. Each workshop required developing presentations internally, navigating compliance reviews, and securing approvals before content could be delivered. As a result, expanding programming, introducing new topics, or empowering additional employees to facilitate sessions required significant time and resources.

The bank needed a solution that would:

- Reduce the burden of creating and maintaining educational content internally
- Enable faster responses to evolving community needs
- Deliver consistent, high-quality financial education experiences across diverse audiences
- Support broader employee participation in community outreach efforts

## THE SOLUTION: Ready-to-Use Financial Education for Community Engagement

The bank selected Everfi Engage to streamline program delivery and expand its educational offerings. With access to a library of pre-built financial education workshops covering topics such as budgeting, credit, identity theft, homeownership, and auto financing, the bank increased programming without increasing administrative complexity.

Everfi Engage enabled the bank to:

- Deliver community workshops using professionally developed, compliance-ready content
- Adapt programming based on partner and community needs
- Provide nonprofit partners with a menu of relevant workshop options
- Enable employees across the organization to facilitate financial education sessions

Rather than spending time developing materials, the bank focused on what mattered most: building relationships and delivering meaningful community impact. Through a collaborative approach in which nonprofit partners recruited participants and bank employees led workshops, the organization established a sustainable model for ongoing engagement.

## THE IMPACT: Expanded Reach, Brand Presence, and Measurable Engagement

The bank's financial education program grew significantly after it implemented Everfi Engage.

Documented outcomes included:

- Approximately 50 workshops delivered annually
- Partnerships with 45-50 nonprofit organizations each year
- Nearly 1,000 Community Reinvestment Act (CRA) hours logged annually
- Hundreds of community members reached through financial education programming

Beyond these metrics, the program strengthened relationships with community organizations and increased the bank's visibility in underserved communities. Participants frequently returned for additional workshops, nonprofit partners continued to request new programming opportunities, and the bank established a trusted presence in communities across its service area.

The program also supported the bank's broader CRA objectives. By delivering financial education to LMI and underserved populations, the bank was able to demonstrate measurable community impact, efficiently document volunteer activity, and maximize the value of employee engagement efforts.

The bank continues to expand its community partnerships and financial education programming to ensure more individuals have access to practical, relevant financial knowledge. By meeting people where they are and providing education through trusted community organizations, the bank is building a scalable model for long-term community impact.

Everfi’s broad offerings of free online education programs for adults and K-12 students help amplify your impact in a meaningful way. Through the support of its corporate sponsors, Everfi has been offering financial literacy education since 2008.

**Learn how you can bring Everfi Engage to your community here.**