



Banker Toolkit



Money Smart Nebraska Week 2011 is November 7-13.

What is Money Smart Nebraska Week?

Money Smart Week is a public awareness campaign designed to help consumers better manage their personal finances. This is achieved through the collaboration and coordinated effort of organizations across the state including businesses, financial institutions, schools, libraries, not-for-profits, government agencies and media. These groups come together once a year to stress the importance of financial literacy, inform consumers where they can get help, and provide free educational seminars and activities throughout the week. Programming is offered to all demographics and income levels and covers all facets of personal finance from establishing a budget to first time home buying to estate planning.

How can I get involved as a banker?

Participating in Money Smart Nebraska Week is not difficult or time consuming. It is an opportunity for your bank to make an impact within your community and educate consumers about the importance of financial education. Partner with a community organization to host or hold a Money Smart event at your bank or work with a local school to teach children the meaning of saving. Take advantage of the Money Smart Nebraska Week's free resources to help teach students and the public about money, banking and personal finance. As a banker, you have the opportunity to reach out to the community and give children and adults the tools and inspiration for a successful financial future.

A great way to learn about the campaign is to review what happened during Money Smart Nebraska Week 2010. The annual report (available at www.MoneySmartNebraska.org) provides a comprehensive overview of the week. It includes information on events and resources, a map of cities participating in Money Smart Week, a recap of media coverage and a complete list of all participating organizations.

The following pages provide information about ideas for events and Money Smart Nebraska promotions, how to include an event and the types of resources available to you as a Money Smart Nebraska participant.



I'd like to get involved with Money Smart Week. What can I do?

Those interested in the cause of financial literacy are welcome to join us! Those involved with Money Smart Nebraska typically do one or more of the following:

- Provide educational materials, instructors or a seminar for consumers
- Provide facilities to host events, sponsor events or promotional materials
- Leverage resources to publicly support or endorse Money Smart Week

Participants post their events for free to an online database of events. In addition, they receive access to a wide range of materials to help promote their events.

What are the next steps?

1. Learn More.

- Go to www.MoneySmartNebraska.org to learn more.

2. Plan.

- Begin to plan an event to occur during Money Smart Week
 - Identify your target audience (i.e. seniors, women, unbanked, youth). Consider audiences your organization may already have a relationship with.
 - Select a topic, secure a venue and select a presenter/speaker.
 - Remember: All workshops, seminars and activities must be educational in nature and relate to improving knowledge of personal finances, from basic savings tips to advanced money management strategies. **Sales pitches and/or commercial marketing are strictly prohibited.**
 - Most workshops, seminars and activities should be free and open to the public. Private events may be included for appropriate audiences such as students, employees and professional groups.

3. Add Your Events.

- Submit your Money Smart Week event information by clicking on "Add an Event" at www.MoneySmartNebraska.org.

4. Market and Promote.

- Get the word out about your event to get the attendance you want. Use some of the free resources online at www.MoneySmartNebraska.org as promotional tools. Think about traditional and social media, websites, flyers, email blasts, news releases, etc.
- Use the free printed promotional cards for the week available to you from the Nebraska Financial Education Coalition to help share information about the week and your events.

5. Have Your Event.

- Conduct your event for your target audiences. Have fun, and remember that financial literacy is essential for all Nebraskans.

6. Evaluate.

- We need your help to measure the success of Money Smart Nebraska. Complete and return the information we'll request - attendance numbers, surveys, photos, media clips and samples of promotional materials.



Best Practices for Hosting and Promoting Events

Creative Events/Topics

The easiest way to get involved with Money Smart Week is to host a regular financial education workshop that you currently offer during the week. Here are some additional ideas:

- Protect yourself against fraud and scams
- Promote the Kids Money Smart essay contest
- College savings
- Buying your first car
- Are you ready for retirement?
- Buying your first home
- Develop and establish good credit
- Learn about various banking products

Creative Ways to Promote Money Smart Nebraska Week

Any combination of these ideas is a great way to be involved in Money Smart Week. Consider promoting Money Smart Nebraska Week even if you are not hosting an event to help spread the word about the week and personal finance. Remember to register at MoneySmartNebraska.org to be recognized for your involvement.

- Put announcements in your bank newsletter.
- Have tellers pass out flyers
- Display Money Smart Week promotional materials (logo, flyers, tattoos) for customers and employees.
- Operation green light (lighting businesses in town in green lights at night).
- Invite local media to hear Money Smart Week message and cover events.
- Place the link www.MoneySmartNebraska.org on your homepage.
- Send an email blast to your contacts.
- Join the Money Smart Nebraska Facebook group and share with your partners.
- Make table tents in your cafeteria.
- Create a contest to promote financial literacy and Money Smart Week (i.e. coloring contest for children).
- Partner with another organization that could plan a financial literacy event to host in your facility.
- Have a Hallo“green” event.
- Have children create Money Smart Week art with sidewalk chalk outside your bank.
- Encourage everyone to wear green for a day during Money Smart Week.



Online Marketing

Participants can download Money Smart Week promotional items at www.MoneySmartNebraska.org (click the resources link in the left hand column). These materials can help create awareness for the week and/or publicize individual events. To request alternate file formats, or for additional assistance, please contact Jennifer Clark at jennifer.clark@kc.frb.org or 402.221.5560.

Logos

Logos can be placed on a wide of array of materials to promote Money Smart Week activities and are available to download on www.MoneySmartNebraska.org.



Posters

Posters are another marketing tool. Available sizes are either 8 ½" x 11" or 11" x 17". The posters allow for customizable text and can be downloaded at www.MoneySmartNebraska.org.

Collateral Materials

Also available under the resources link on the website are sample materials including radio public service announcement scripts, newsletter articles, press releases, fact sheets, talking points, PowerPoint presentations and financial literacy facts. All are available for free download and can be customized to your specific organization.



Resources

The following are free resources that can be used for events your bank hosts:

Fifty Nifty Econ Cards are a set of economic and personal finance vocabulary cards accompanied by a teacher resource guide that suggests activities and games for use with the cards. The cards are appropriate for grades K-8. View information online and order a free set of the cards at <http://www.federalreserveeducation.org/resources/fiftynifty/>.

Children's literature can contain many economic and personal finance topics. A variety of lesson plans from scarcity to competition, division of labor and incentives accompany selected children's books at www.stlouisfed.org/education_resources.

The Traveling Trunk can be used with elementary and middle school students to develop an awareness of the Federal Reserve Bank and to share resources available on money and banking. The trunk includes hands-on artifacts with related talking points, as well as lesson plans and activities to teach money concepts. The trunk can be reserved by contacting Megan Manning at megan.manning@kc.frb.org or 402.221.5622.

Banking Basics is a booklet that provides an overview of the banking system for young people. It helps explain bank accounts, debit and credit cards, electronic banking and the role of the Federal Reserve. The publication, which is appropriate for grades 5-12, can be viewed online or ordered at www.bos.frb.org/education/pubs/bankingbasics.htm.

"Professor Finance and Fed Boy Meet the Catastrophe Clan" is a personal finance role play and lesson plan that gives an overview of credit and loan operations and consumers' rights to credit through the CARD Act. It is appropriate for grades 9-12 and available at http://kansascityfed.org/publicat/education/teachingresources/fed_boy_lesson_plan.pdf.

EcEdWeb, the Economic Education Web, provides extensive resources and materials for teaching K-12 economics and personal finance. Search the available offerings at <http://ecedweb.unomaha.edu/home.cfm>.

EconEdReviews is the place to find economic education lessons and materials for the K-12 classroom. Teachers who have used the economics and personal finance lessons will guide you with their reviews and rating. Search for lesson materials by grade level, concept, subject and/or standard at www.econedreviews.org.

EconEdLink is a premier source of classroom tested, Internet-based economic and personal finance lesson and resources for teachers, students and parents. Thousands of free lessons are available at www.econedlink.org.



What is the Nebraska Financial Education Coalition?

The Nebraska Financial Education Coalition is a group of interested businesses, individuals, financial institutions, and government and non-profit agencies who believe that basic personal financial literacy is an essential skill. The Coalition's mission is to strive to improve the personal financial knowledge and decision-making ability of Nebraska citizens by promoting public awareness of the need for personal financial education, and by facilitating networking and partnerships for financial education service providers. Our long-term goal: for all Nebraska citizens – no matter the age, background or circumstance – to achieve long-term personal financial health. The Nebraska Financial Education Coalition is also an affiliate of the National Jump\$tart Coalition for Personal Financial Literacy. Jump\$tart is a national coalition of organizations dedicated to improving the financial literacy of kindergarten through college-age youth by providing advocacy, research, standards and educational resources. For more information about the Nebraska Financial Education Coalition, visit our site at www.nebraskafinancialeducation.org.

Contacts

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To learn more about Money Smart Nebraska Week, visit www.MoneySmartNebraska.org.

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