WORKSHOP LEADER’S GUIDE FOR \textit{FINANCING YOUR FUTURE}\footnote{\textit{Financing Your Future} is a program developed by the National Council on Economic Education with funding from the Citigroup Foundation.}

PART I Organizing the Workshop

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Overview

Use the information in this section of the Workshop Leader’s Guide to plan and market your workshop. It is important to begin as early as possible to give teachers, schools and school districts time to plan for teachers to attend. Check local school calendars to avoid conflicts, such as holidays, parent-teacher conferences, and testing conflicts. If possible, work with curriculum coordinators, staff development coordinators, administrators, principals and classroom teachers to select the best day and time and to avoid conflicts.

Contact a Citigroup representative in your city, state or region. Councils and Centers receiving workshop funding will be provided the name of the key Citigroup representative to contact. Invite the representative to attend your workshop and speak about the Citigroup Foundation’s commitment to financial education. Talk with the representative about possible follow-up activities.

Once a date, time and location for the workshop have been chosen, let teachers know. The earlier they know, the more likely they are to attend. It is best to announce the program in multiple formats as often as possible. For example, mail announcements to curriculum coordinators and staff development personnel and request that they share the information with teachers in their district. Place an announcement on your website and mail flyers to your target audience. Ask state regional education offices to post an announcement of the program on their websites.
Workshop Planning Checklist for Financing Your Future

1. Identify the Logistics
   ___ date
   ___ day of the week
   ___ time of day
   ___ specific time
   ___ location
   ___ availability of instructional technology

2. Identify the audience
   ___ high school economics teachers
   ___ high school business teachers
   ___ high school social studies teachers
   ___ high school family and consumer science teachers
   ___ high school math teachers
   ___ curriculum coordinators
   ___ community based organizations

3. What organizations/individuals in your area could provide assistance?
   ___ regional education offices or service agencies
   ___ curriculum coordinators
   ___ staff development professionals
   ___ high school principals/assistant principals
   ___ social studies department chair
   ___ family and consumer science department chair
   ___ business education department chairs
   ___ college/university professors
   ___ state department of education officials
   ___ other

4. What type of assistance can these organizations/individuals provide?
   ___ provide lists of interested teachers
   ___ endorse the program or topic
   ___ encourage teacher participation
   ___ co-sponsor the workshop
   ___ provide a facility
   ___ advertise the program by distributing flyers or including the program on their websites
   ___ send electronic or print invitations to teachers

5. Organizations with which you might partner
   ___ Citigroup branches or services in your area
   ___ local banks
   ___ certified financial planner associations
   ___ local credit unions
   ___ other
6. What type of assistance might partners provide?
___a facility
___refreshments
___speakers
___small incentives or awards for teachers
___print and/or mail flyers

7. Things to consider in your budget
___facility fees
___parking fees if applicable
___printing and mailing of brochures or flyers
___copying and mailing (confirmation letters and other information for participants)
___workshop materials and supplies
___fees for equipment (LCD projector, overhead, laptop, DVD player and monitor)
___refreshment
___set-up and clean-up costs if applicable
___fees for participation
___cost of DVD *
___prizes/awards/incentives for participants
___honoraria for workshop leaders
___stipends for teachers
___substitute pay for school districts
___fee for technology assistant

* Up to 30 free DVDs will be made available to Centers and Councils conducting a funding workshop.
**One week before the workshop:**

- Have you sent confirmation letters or emails along with directions, parking stickers or other needed materials to those who have registered?
- Have you organized the logistics for the workshop such as room set up including check-in table, refreshments, seating, placement of overhead and other technology?
- Have you prepared nametags and sign-in sheets so that you have contact information for participants.
- Have you thoroughly reviewed the video program and associated lessons from the teachers guide?
- Have you gathered supplies and materials?
- Have you reviewed and selected the PowerPoint slides you will use and made notes on the “thumbnails” in this guide?
- Have you prepared a backup set of transparencies in case technology fails?
- Have you made copies of
  - the Teachers Handouts
  - the Workshop Evaluation Form
  - the Picture Release Forms for the participants to sign
  - the Workshop Participant Form or Alternate Individual Attendance Form
- Have you confirmed arrangements for facility and food?
- Have you arranged to have a technology person available at the site to assist you in case of problems?
- Have you sent an email or made a phone call to remind participants they are registered for the workshop?

**Day of the workshop:**

- Arrive at the workshop site early.
- Test the DVD in the DVD player
- Test the PowerPoint presentation on the LCD projector
- Make sure refreshments, name tags, sign-in sheets and other items related to registration are available.
- Make sure participants sign-in using the forms you have made available
- Start the program on time.
- Don’t overwhelm your participants with “everything that you know.”
- Don’t read to your audience. Involve them in activities.
- Be sensitive to participants needs. Plan breaks at appropriate intervals.
- Take pictures to document the success of the workshop.
- Obtain signed release forms from participants
- Finish on time.
After the workshop

♦ Send thank-you letters to co-hosts/sponsors, district or school personnel who assisted with recruitment and planning, financial supporters, and co-presenters. Include copies of workshop evaluations.
♦ Send notes to the principals of teachers who attended. Thank the principals for providing the opportunity for teacher(s) to attend.
♦ Add the workshop statistics to your productivity report.
♦ Complete written reports required by the National Council on Economic Education or funders of the workshop.
♦ Process any payments that you have agreed to provide.

Suggested Follow-Up with Participants

♦ Work with a Citigroup representative in your city, state or region to develop a follow-up activity that might be used by Citigroup volunteers who visit high school classrooms.
♦ Several weeks after the workshop follow-up with workshop participants via email and ask if they have had the opportunity to use the program in their classes.
♦ Offer those who respond an opportunity to have someone from Citigroup visit and speak with students about financial literacy. Suggested topics are student loans, car loans, banking services, budgeting, credit, and saving.
♦ Host an after school, follow-up meeting. Serve light refreshments. Collect feedback from teachers regarding the DVD series and the lessons in the teacher’s guide. Invite a speaker to discuss a financial topic of interest to teachers, such as obtaining your credit report, understanding your credit report, or how do credit agencies determine FICO scores.
Sample Workshop Flyer

The Center for Economic Education at
<Insert Name of the University>
in collaboration with the
National Council on Economic Education and The Citigroup Foundation

Presents

Financing Your Future
A workshop for high school economics, social studies, personal finance, family and consumer science, and business teachers
Introducing a new video series resource for teaching personal finance

<table>
<thead>
<tr>
<th>Date:</th>
<th>&lt;Insert Date&gt;</th>
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<tbody>
<tr>
<td>Time:</td>
<td>&lt;Insert Time&gt;</td>
</tr>
<tr>
<td>Location:</td>
<td>&lt;Insert Location&gt;</td>
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<tr>
<td>Fee:</td>
<td>&lt;Insert Fee&gt;</td>
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</tbody>
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WORKSHOP HIGHLIGHTS
♦ Free copy of *Financing Your Future* with lessons that meet state standards
♦ Breakfast/lunch/snacks provided
♦ Hands-on lesson demonstrations
♦ Certificate for renewal credits/inservice credit available

For more information or to register, contact:
<Insert Contact Name, Address, Telephone, Fax, and Email>

To register for the *Financing Your Future* workshop, complete the form below and mail to:
<Insert Name>
<Insert Organization>
<Insert Address>
<Insert City State Zip>

Or register online
at <Insert Web Address>

Space is limited—enroll today! Registration due by <Insert Deadline>

<table>
<thead>
<tr>
<th>Name:</th>
</tr>
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<tbody>
<tr>
<td>School:</td>
</tr>
<tr>
<td>Address:</td>
</tr>
<tr>
<td>School Phone:</td>
</tr>
</tbody>
</table>
Sample Confirmation Letter

The Center for Economic Education at
<Insert University>
<Insert Address>
<Insert City State Zip>

<Insert Date>

<Insert Name>
<Insert Address>
<Insert City State Zip>

Dear <Insert Name>:

This letter confirms your registration for the Financing Your Future* workshop made possible by a grant from the Citigroup Foundation. The workshop is being offered by the <insert center name> on <insert day and date> in <room> of the <insert building> at <insert address>. Please note that the workshop is from <insert time>. Participants will receive the Financing Your Future DVD, schedule and refreshments.

Please note that reservations are required for participation. We order food and materials based on registration. If for some reason you are unable to attend, please give us 24-hour notice so that we can reduce the amount of food ordered.

Included with this letter are a map, parking information, and parking sticker. Thank you for your interest in this program.

Cordially,

<Insert Your Name>, Director
Center for Economic Education

*Financing Your Future is a program developed by the National Council on Economic Education with funding from the Citigroup Foundation.
**Workshop Participant Form**

A web-based workshop participant form is currently being developed by NCEE to streamline reporting of grant-funded workshops. This form will be available at [http://financingyourfuture.ncee.net/resources/](http://financingyourfuture.ncee.net/resources/)

Councils and Centers may also submit the required information in a spreadsheet (.xls) file similar to the one pictured below or in some cases available online.

![Spreadsheet Image]

In order to collect the required information from participants, workshop leaders may choose to print and distribute the form on the next page to participants at the workshop. Many organizers find it convenient to collect most of the information while they are recruiting participants.
Alternate Individual Attendance Form

FINANCING YOUR FUTURE WORKSHOP

DATE: <Insert Date>
OFFERED BY: The Center for Economic Education at
<Insert University>
<Insert Address>
<Insert City State Zip>
LOCATION: <Insert Location>
WORKSHOP LEADER: <Insert Workshop Leader>
CONTACT HOURS: <Insert Contact hours>

Please complete this form to be notified of future economic education programs and materials.

Name: _____________________________________________ ________________________
Position: ___Teacher     ___District Office     ___Other(specify)_______________________
Grade Level(s) Taught: _________________  Subject or Area Taught: ________________

HOME

Address: ________________________________________________________________
City, State, Zip Code: _____________________________________________________
Telephone: Voice (___) __________ Fax (____) __________________________
E-mail: ______________________________________________________________

SCHOOL OR COMMUNITY GROUP

Name: ________________________________________________________________
Street Address: __________________________________________________________
City, State, Zip Code: ___________________________________________________
Telephone: Voice (___) __________
FINANCING YOUR FUTURE Workshop Evaluation

Offered on <Insert Date> for <Insert # of Contact hours> Contact Hrs at <Insert Location> by <Insert Workshop Leader> from the Center for Economic Education at <Insert University>

Please respond to each statement by selecting the appropriate answers from the scale:

[ ] 1 (SD) Strongly Disagree  [ ] 2 (D) Disagree  [ ] 3 (N) Neutral  [ ] 4 (A) Agree  [ ] 5 (SA) Strongly Agree

1. The workshop was valuable to me.
   [ ] 1 (SD)  [ ] 2 (D)  [ ] 3 (N)  [ ] 4 (A)  [ ] 5 (SA)

2. The workshop was well organized.
   [ ] 1 (SD)  [ ] 2 (D)  [ ] 3 (N)  [ ] 4 (A)  [ ] 5 (SA)

3. Much of the content presented in the workshop was new to me.
   [ ] 1 (SD)  [ ] 2 (D)  [ ] 3 (N)  [ ] 4 (A)  [ ] 5 (SA)

4. The trainer(s) did a good job of explaining the material.
   [ ] 1 (SD)  [ ] 2 (D)  [ ] 3 (N)  [ ] 4 (A)  [ ] 5 (SA)

5. The trainer(s) were skillful in using a variety of instructional materials.
   [ ] 1 (SD)  [ ] 2 (D)  [ ] 3 (N)  [ ] 4 (A)  [ ] 5 (SA)

6. The materials appear useful for my classroom use.
   [ ] 1 (SD)  [ ] 2 (D)  [ ] 3 (N)  [ ] 4 (A)  [ ] 5 (SA)

7. The materials offer a different way for me to deliver instruction I already use in my classroom.
   [ ] 1 (SD)  [ ] 2 (D)  [ ] 3 (N)  [ ] 4 (A)  [ ] 5 (SA)

8. This was a good learning experience.
   [ ] 1 (SD)  [ ] 2 (D)  [ ] 3 (N)  [ ] 4 (A)  [ ] 5 (SA)

9. I would recommend this training to other colleagues.
   [ ] 1 (SD)  [ ] 2 (D)  [ ] 3 (N)  [ ] 4 (A)  [ ] 5 (SA)

10. I plan to implement the program.
    [ ] 1 (SD)  [ ] 2 (D)  [ ] 3 (N)  [ ] 4 (A)  [ ] 5 (SA)

11. This training makes me want to learn more about economics.
    [ ] 1 (SD)  [ ] 2 (D)  [ ] 3 (N)  [ ] 4 (A)  [ ] 5 (SA)

12. I have access to the instructional technology needed to use this program effectively.
    [ ] 1 (SD)  [ ] 2 (D)  [ ] 3 (N)  [ ] 4 (A)  [ ] 5 (SA)

13. What did you like best about the workshop?

   __________________________________________________________
   __________________________________________________________

14. What suggestions do you have for improving the training?

   __________________________________________________________
   __________________________________________________________

Thank you again for your time – we value your feedback!
Sample Picture Release Form

PHOTO AND COMMENT RELEASE FORM

FINANCING YOUR FUTURE WORKSHOP

DATE: <Insert Date>
OFFERED BY: The Center for Economic Education at <Insert University>
             <Insert Address>
             <Insert City State Zip>
LOCATION: <Insert Location>
WORKSHOP LEADER: <Insert Workshop Leader>
CONTACT HOURS: <Insert Contact hours>

I hereby consent that the photographs taken of me by a representative of <insert center, council or other organization name here>, and any comments that I have provided on this form below, may be used by <insert organization name>, without further consideration, for use in advertising, promotion, or publications in any <insert organization name>-related material.

________________________________________  _________________
Signature (Parent or Guardian if subject is a minor)  Date

Please print:

Name: ____________________________________________ __________________________
Address: _________________________________________ ___________________________
City, State, Zip: ________________________________ ______________________________
Event at which photos were taken: ________________ ______________________________
Date: _________________  Location: ______________ _______________________________
Comments to use in publications: _________________ ______________________________

___________________________________________________ __________________________
___________________________________________________ ___________________________

How do you want your name to appear in publications?

___________________________________________________ __________________________

How do you want your school name to appear in publications?

___________________________________________________ __________________________
Sample Letter to Principal

The Center for Economic Education at
<Insert University>
<Insert Address>
<Insert City State Zip>

<Insert Date>

<Insert Name>
<Insert Address>
<Insert City State Zip>

Dear Principal:

A teacher from your school, <Insert Name of Participant Here>, attended a workshop underwritten by the Citigroup Foundation and hosted by the Center for Economic Education at <Insert College or University Name Here>. The workshop introduced a new DVD series, Financing Your Future,* for teaching high school students important personal financial management skills. The workshop took place on <Insert Date Here> and was attended by teachers from throughout the area.

Congratulations for having such a dedicated staff member who seeks out opportunities for personal growth and for improving classroom instruction. Thank you for providing the support that allows your teaching staff to participate in programs like this one.

Sincerely,

<Insert Your Name Here>, Director
Center for Economic Education

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