

WORKSHOP LEADER'S GUIDE FOR *FINANCING YOUR FUTURE**

PART I Organizing the Workshop

Contents

1.	Overview	2
2.	Workshop Planning Checklist	3-4
3.	One Week before Workshop Guide	5
4.	Day of Workshop Guide	5
5.	After Workshop Guide	6
6.	Suggested Follow Up with Participants	6
7.	Sample Workshop Flyer	7
8.	Sample Confirmation Letter	8
9.	Workshop Participant Form	9
10.	Alternate Individual Attendance Form	10
11.	Financing Your Future Workshop Evaluation Form	11
12.	Sample Picture Release Form	12
13.	Sample Letter to Principal	13
14.	Information for Press Releases	14

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

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

Date:	<Insert Date>
Time:	<Insert Time>
Location:	<Insert Location>
Fee:	<Insert Fee>

<p>WORKSHOP HIGHLIGHTS</p> <ul style="list-style-type: none"> ◆ Free copy of <i>Financing Your Future</i> with lessons that meet state standards ◆ Breakfast/lunch/snacks provided ◆ Hands-on lesson demonstrations ◆ Certificate for renewal credits/in-service credit available 	<p>For more information or to register, contact:</p> <p><Insert Contact Name, Address, Telephone, Fax, and Email></p>
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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>				
Name:				
School:				
Address:				
School Phone:	Home Phone:	E-mail:		

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

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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) 2 (D) 3 (N) 4 (A) 5 (SA)
Strongly Disagree Disagree Neutral Agree 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 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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