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**MONEY  
SMART  
WEEK<sup>®</sup>**

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**APRIL 21-28, 2012**

**Partner Kit  
2012**

*"Money Smart Week" is a registered service mark of the Federal Reserve Bank of Chicago.*

# MONEY SMART WEEK®

APRIL 21–28, 2012 | [MONEYSMARTWEEK.ORG](http://MONEYSMARTWEEK.ORG)

## Partner Kit 2012 | Table of Contents

### Page 3 – 13

#### What is Money Smart Week?

These introductory documents provide a brief summary on the history and mission of the Federal Reserve Bank of Chicago's Money Smart Week program, Fed & chairperson contacts as well as partner guidelines. A logic model for the effort is also included.

### Page 14 – 15

#### The Fed & Policies

Short outline on the function of the Fed as well fundraising policies partners must adhere to.

### Page 16

#### Timeline/Action Plan

This table charts important dates and activities for your Money Smart Week campaign. Dates may be subject to change, you will be notified of any timeline adjustments.

### Page 17 – 22

#### Tools and Best Practices

These documents offer suggested committees and structure, best practices for success, online tools, instructions for accessing the database and reporting information.

### Page 23 – 25

#### Marketing Materials

Instructions on how to download marketing materials online are available here. Materials include logos, posters/flyers, bookmarks, inserts and t-shirts. A limited quantity will be provided to each Money Smart Week partner at no cost. These quantities must be submitted to the Fed by the deadline indicated with the included order form.

### Page 26 – 30

#### Presenter Resources

An opening script is provided to guide in-class presenters in explaining Money Smart Week and the class affiliation with the overall effort. Consumer surveys and a sign-up sheet for participants are also included. A checklist is provided to remind presenters of expected duties.

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## About the Federal Reserve System

The Chicago Fed is one of 12 regional Reserve Banks across the United States that, together with the Board of Governors in Washington, D.C., serve as the central bank for the United States.

Congress created the Federal Reserve System in 1913, charging it with the responsibility to foster a sound banking system and a healthy economy. This remains the broad mission of the Fed and its component parts: the 12 Federal Reserve Banks nationwide that each serve a specific region of the country, and the Board of Governors in Washington, D.C., which is set up to oversee the Fed System.

To accomplish its mission, the Fed serves as:

- a banker's bank and as the government's bank
- a regulator of financial institutions
- the nation's money manager, performing a vast array of functions that affect the economy, the financial system, and ultimately, each of us

## About the Federal Reserve Bank of Chicago

The Chicago Fed serves the Seventh Federal Reserve District, an economically diverse region that includes all of Iowa and most of Illinois, Indiana, Michigan and Wisconsin. The Seventh District has a large national share of many important economic sectors. The Chicago Fed has a head office in Chicago, branch office in Detroit, a regional office in Des Moines and a facility on the southwest side of Chicago.



As part of the central bank, the Chicago Fed supports financial education with the belief that consumers greatly benefit from making informed money decisions. When consumers save, spend and invest wisely, they contribute toward their long term financial well being as well as have a positive impact on the economy overall.

# MONEY SMART WEEK

APRIL 21–28, 2012 | [MONEYSMARTWEEK.ORG](http://MONEYSMARTWEEK.ORG)

## What is Money Smart 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 hundreds of organizations across the country including businesses, financial institutions, schools, libraries, not-for-profits, government agencies and the media. These groups come together once a year to stress the importance of financial literacy, inform consumers about 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.

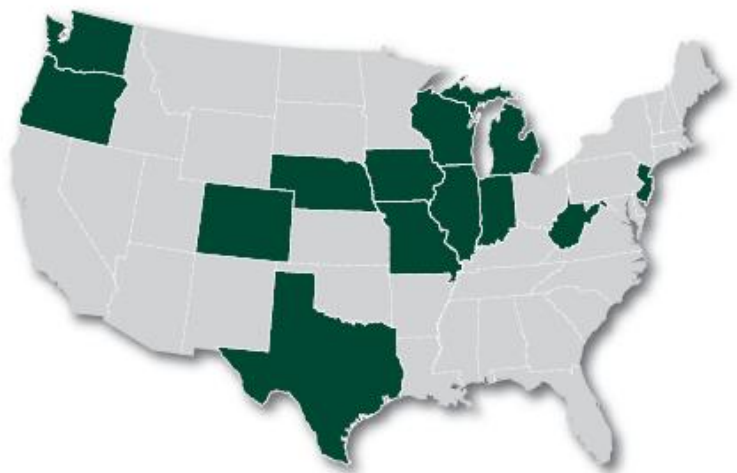
## How Did It All Get Started?

Money Smart Week began as a coordinated effort of the Federal Reserve Bank of Chicago and the Money Smart Advisory Council – a diverse group of more than 40 Chicago-area organizations working together to promote personal financial literacy. Members agreed to share resources and ideas to achieve greater public awareness of the programs and services available in the city of Chicago. The result was Money Smart Week 2002, a week of 40 financial seminars and educational activities. The effort would showcase different programs, help consumers get information, bring together different organizations – many for the first time – and help these organizations share expertise and leverage limited resources. The Money Smart Week model has since spread throughout the country with successful campaigns in 13 states.

## Campaign Snapshot

Money Smart Week campaigns are heavily concentrated in the Midwest, but continue to expand throughout the country. Outside the Federal Reserve 7th District, which includes, Illinois, Indiana, Iowa, Michigan and Wisconsin, campaigns have launched in all corners of the country. Most recently, Oregon, Washington and West Virginia joined the effort in 2011. The Chicago Fed advises new campaigns and provides planning and promotional tools such as the website, logos, best practices, media kit templates and more. For a complete overview of the current Money Smart Week effort, refer to the map. States with campaign activity are highlighted in green.

- COLORADO
- ILLINOIS
- INDIANA
- IOWA
- MICHIGAN
- MISSOURI
- NEBRASKA
- NEW JERSEY
- OREGON
- TEXAS
- WASHINGTON
- WEST VIRGINIA
- WISCONSIN



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## How Can My Organization Get Involved in Money Smart Week?

Please contact the Federal Reserve Bank representative or Chairperson in your state/region. If you are unsure who to contact or do not see your area listed, please contact Alejo or Tiffany. Note: Regions highlighted in GREY are independent from the Chicago Fed and may have processes, structure and policies outside of this partner kit.

### All States

Region	Organization	Contact Person	Phone	Email
All	Federal Reserve Bank of Chicago	Alejo Torres	(312) 322-2287	Alejo.Torres@chi.frb.org
All	Federal Reserve Bank of Chicago	Tiffany Butler	(312) 322-2920	Tiffany.Butler@chi.frb.org
All – ALA Member Libraries	American Library Association	Michael Dowling	(800) 545-2433 ext. 3200	mdowling@ala.org

### Colorado

Region	Organization	Contact Person	Phone	Email
All	Federal Reserve Bank of Kansas City - Denver Branch	Stacee Montague	(303) 572-2385	Stacee.montague@kc.frb.org

### Illinois

Region	Organization	Contact Person	Phone	Email
-Bloomington/Normal	COUNTRY Financial	Melissa Libert	(309) 821-4363	melissa.libert@countryfinancialcount.com
-Capitol Area	Bank of Springfield	Monica Dyson	(217) 241-6203	mdyson@bankofspringfield.com
-Champaign County	PNC Bank	Dave Henry	(217) 363-4083	david.henry@pnc.com
-Chicago	Chicago Fed	Tiffany Butler	(312) 322-2920	Tiffany.Butler@chi.frb.org
-Decatur	Soy Capitol Bank	Gretchen Murphy	(217) 421-9621	gmurphy@soybank.com
-DuPage County	The DuPage Community Foundation	Barb Szczepaniak	(630) 665-5556	barbs@dcdn.org
-Peoria	Soy Capitol Bank	Tammy Bomleny	(309) 687-6004	tbomleny@soybank.com

-Rockford	Members Alliance Credit Union	Lorna Cote	(815) 226-2260 ext. 313	lcote@membersalliance.org
-Vermillion County	Education Personnel FCU	Hope Garrett	(217) 446-0777	hgarrett@epfcu.com

## Indiana

Region	Organization	Contact Person	Phone	Email
-Bartholomew County	Warren Ward Associates	Jalene Hahn	(812) 379-1120	jalene@warrenwardassociates.com
-Central/Indianapolis	Indiana Secretary of State's Office	Melanie Woods	(317) 233-3985	mlwoods@sos.in.gov
-Elkhart		Chris Petersen – Grosse	(574) 522-3561	cpgross@earthlink.net
-Evansville	Dunigan Family YMCA	Dian Braun	(812) 426-6210 ext. 4312	braun@ymca.evansville.net
-Fort Wayne	Purdue Cooperative Extension Service	Vickie Hadley	(260) 481-6826	hadleyv@purdue.edu
-Jeffersonville	Southern Indiana Asset Building Coalition	Whitney Bishop	(812) 206-7514	Whitney@assetbuildingcoalition.org
-Knox County	United Way of Knox County	Amanda Quirk	(812) 882-3624	amandaknoxuw@sbcglobal.net
-Lafayette	United Way of Greater Lafayette	Laura Carson	(765) 742-9077 ext. 233	lcarson@uw.lafayette.in.us
-Marshall County	ExecuEssential Administrative Services	Marla Murasko	(866) 542-2535	Execuessential@gmail.com
-Northwest	Centier Bank	Dian Reyome	219-755-6140 ext. 1832	dreyome@centier.com
-South Bend	Purdue Extension	Eddie Sutton	(574) 235-9604	sutton@purdue.edu
-Terra Haute	St. Mary of the Woods College	James Tanoos	(812) 535-5189	Jtanoos@smwc.edu

## Iowa

Region	Organization	Contact Person	Phone	Email
-All Iowa	Kuster, Ltd.	Joanne Kuster	(515) 991-5632	joanne@kusterltd.com

-Cedar Falls	Iowa State Extension	Michelle Temeyer	(319) 234-6811	temeyer@iastate.edu
-Cedar Rapids	Community Corrections Improvement Association	Julie Rochford	(319) 730-1118	Julie.rochford@iowa.gov
-Council Bluffs	TS Bank Institute	Bob Mantell	(712) 487-3181	bmantell@treynor.k12.ia.us
-Council Bluffs	Iowa State Extension	Marybeth Kaufman	(712) 755-3104	mbkaufman@iastate.edu
-Des Moines	Kuster, Ltd.	Joanne Kuster	(515) 991-5632	joanne@kusterltd.com
-Quad Cities	BlackHawk Bank & Trust	Janet Holton	(309) 787-9534	jholton@choosethechief.com

## Michigan

Region	Organization	Contact Person	Phone	Email
-All Michigan	Federal Reserve Bank of Chicago – Detroit Branch	Martin Lavelle	(313) 964-6150	martin.lavelle@chi.frb.org
-Lansing/Capitol Area	Ingham County Treasurer & Land Bank	Eric Schertzing	(517) 676-7233	tr_schertzing@ingham.org
-Northwest Michigan	Northwest Michigan Community Action Agency	Jeannette Whetstone	(231) 775-9781	jwhetstone@nmcaa.net

## Missouri

Region	Organization	Contact Person	Phone	Email
-Kansas City	Federal Reserve Bank of Kansas City	Gigi Wolf	(816) 881-2736	Gigi.wolf@kc.frb.org
-Springfield	Springfield-Greene Library District	Kay Raider	(417) 616-0537	kayr@thelibrary.org
-St. Louis	PNC Bank	Laurel Peterson	(309) 823-3934	laurel.peterson@pnc.com

## Nebraska

Region	Organization	Contact Person	Phone	Email
-All Nebraska	Federal Reserve Bank of Kansas City – Omaha Branch	Jennifer Clark	(402) 221-5560	Jennifer.clark@kc.frb.org

## New Jersey

Region	Organization	Contact Person	Phone	Email
-Sussex County	Rutgers Cooperative	Barbara O'Neal	(732) 932-9155	oneal@aesop.rutgers.edu

	Extension		ext. 250	
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## Oregon

Region	Organization	Contact Person	Phone	Email
All Oregon	First Tech Credit Union	Ryan McKernan	(503) 350-3359	Ryan.mckernan@firsttechcu.com

## Texas

Region	Organization	Contact Person	Phone	Email
-Austin	Federal Deposit Insurance Corporation	Gina Vincent	(972)761-2504	gvincent@fdic.gov
-El Paso	Federal Reserve Bank of Dallas- El Paso Branch	Yvonne Fernandez	(915)521-5259	yvonne.fernandez@dal.frb.org
-Houston	Federal Reserve Bank of Dallas – Houston Branch	Jackie Hoyer	(713) 483-3134	Jackie.hoyer@dal.frb.org

## Washington

Region	Organization	Contact Person	Phone	Email
-All Washington	WSCP/WA Jump\$art	Amy O'Donnell	(425) 586-1140	aodonnell@wscpa.org

## Wisconsin

Region	Organization	Contact Person	Phone	Email
-All Wisconsin	WI Dept. of Financial Institutions	Teresa Walker	(608) 267-1713	teresa.walker@wisconsin.gov
-Dane County	Summit Credit Union	Amy Crowe	(608) 243-5000	Amy.Crowe@summitcreditunion.com
-Dodge County	Absolute Home	Michael Firchow	(920) 386-3790	Michael@absoluteonestop.com
-Douglas County	UW Extension – Douglas County	Joan Wimme	(715)395-1363	Joan.Wimme@ces.uwex.edu
-Douglas County	UW Extension – Douglas County	Linda Bruce	(715) 395-1363	Linda.Bruce@uwex.edu
-Eau Claire Area	Royal Credit Union	Mary Ginder	(715) 833-8167	maryg@rcu.org
-Fond du Lac County	Fond du Lac Public Library	Lori Burgess	(920) 929-7080 ext. 126	burgess@fdlpl.org



-Fond du Lac County	Consumer Credit Counseling Services	Tammy Matzdorf	(920) 907-4344	tammyccssheb@yahoo.com
-Fox Cities Area	Capital Credit Union	Cindi Witt	(920) 738-9200 ext. 3424	CindiW@Capitalcu.com
-Fox Cities Area	Fox Communities Credit Union	Linda Fickau	N/A	lfickau@foxcu.org
-Green Bay Area	Catholic Charities Budget Counseling	Bobbie Lison	(920) 437-7531	blison@gbdioc.org
-Green Bay Area	Green Bay Area Chamber of Commerce	Nancy Schopf	(920) 437-8704	schopf@titletown.org
-Kenosha County	United Way of Kenosha County	Megan Kroes	(262) 658.4104	mkroes@kenoshaunitedway.org
-La Crosse County	UW Extension – La Crosse County	Mary Meehan-Strub	(608) 785-9593	mary.meehan-strub@ces.uwex.edu
-La Crosse County	Consumer Credit Counseling Services	Pete Rasmussen	(608) 784-8380	pete.cccs@yahoo.com
-Lac du Flambeau Region	Wigamig Owners Loan Fund, Inc.	Fern Orié	(715) 588-1600	fern.orie@wigamig.org
-Manitowoc County	M&I Bank	Sue Novak	(920) 683-6710	susan.novak@micorp.com
-Marshfield Area	United Way	Sara Krenn	(715) 384-9992	unitedway.sarah@tznnet.com
-Menominee County	Menominee Tribal Enterprises	Sharon Waukau	(715) 756-2311 ext. 1153	sharonw@mtewood.com
-Milwaukee Area	Wells Fargo	Daniel Sweeney	(414) 224-4224	Daniel.Sweeney@wellsfargo.com
-Northwest Wisconsin	WI Indianhead Technical College	Teri Schult	(715) 635-9120	teri.schult@witc.edu
-Oconto County	NEW Credit Union	Laura Schenkoski	(920) 835-9718	lschenkoski@newcu.org
-Ozaukee County	UW Extension – Ozaukee County	Carol Bralich	(262) 284-8291	carol.bralich@ces.uwex.edu
-Polk County	Polk County Library Federation	Colleen Gifford	(715) 485-8680	giffordfoxwell@polkcountylibrary.org
-Rice Lake Area	WI Indianhead Technical College	Teri Schult	(715) 635-9120	teri.schult@witc.edu

-Shawano County	UW Extension – Shawano County	Linda Olson	(715) 526-4869	linda.olson@co.shawano.wi.us
-Sheboygan County	Consumer Credit Counseling Services	Matt Kautzer	(920) 458-3784	mattkautzer.cccs@yahoo.com
-Southwest Wisconsin	Economics Wisconsin Advisory Board	Bobbie Boyle	N/A	redminer@centurytel.net
-Southwest Wisconsin	Economics Wisconsin Advisory Board	Tim Strang	N/A	tkstrang@centurytel.net
-Spooner Area	WI Indianhead Technical College	Teri Schult	(715) 635-9120	teri.schult@witc.edu
-Washington County	UW Extension – Washington County	Marma McIntee	(262) 335-4479	marma.mcintee@ces.uwex.edu
-Wausau Area	WI Housing & Economic Development	Arlene Scalzo	(800) 628-4833	arlene.scalzo@wheda.com
-Wausau Area	United Way Marathon County	JoAnn Janikowski	(715) 848-2927	jjanikowski@unitedwaymc.org
-Wausau Area	U.S. Bank	Pam Anderson	(715) 843-8228	pam.anderson@usbank.com
-Winnebago County	Oshkosh Public Library	Janice Dibble	(920) 236-5214	Dibble@oshkoshpubliclibrary.org
-Winnebago County	UW Extension – Winnebago County	Kristi Cutts	(920) 232-1973	KCutts@co.winnebago.wi.us

## West Virginia

Region	Organization	Contact Person	Phone	Email
West Virginia	AARP Foundation	Susan LaFew	(304) 340-4617	slewfew@aarp.org

# MONEY SMART WEEK®

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## What is a Money Smart Partner?

A Money Smart partner is an organization that actively participates during Money Smart Week with the approval of the Federal Reserve Bank. Organizations are considered partners upon agreeing to 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

Partners are expected to provide leadership, communicate internally and externally, possess or acquire general financial literacy knowledge and be committed to the Money Smart Week program. Current partners include businesses, financial institutions, schools, libraries, not-for-profits, government agencies and the media.

## Money Smart Partner Responsibilities

Money Smart partners are expected to adhere to the following guidelines:

- 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 will be included for appropriate audiences such as students, employees and professional groups, but in turn might not be publicized as part of the public event calendar.
- Implement, as able, additional marketing and/or promotional strategies for their individual events to secure attendance numbers. Promotional packages will be given to partners to help with media efforts.
- Appoint a representative to manage Money Smart Week activities and to allow for attendance at planning meetings scheduled in your area leading up to the event. Note that meetings are not required, but are encouraged to facilitate networking and planning among partners.
- Provide vision, leadership and general direction to third-party sponsors/presenters.
- Sign up online as a partner and submit Money Smart Week event information via the on-line database before or on the given deadline.
- Complete and return measurement package including attendance numbers for all events, partner surveys, participant surveys, photos, media clips and samples of any other promotional materials used during the campaign.

# MONEY SMART WEEK®

APRIL 21–28, 2012 | [MONEYSMARTWEEK.ORG](http://MONEYSMARTWEEK.ORG)

## How do I sign up to be a Money Smart Partner?

Money Smart partner registration is online. All partners are required to register online to become official partners for 2012 and in the future. By registering online, you will receive notifications, news, and updates from the Fed as they are sent. Signing up online requires filling out a profile about yourself and your organization. Please note that by registering online, you must agree to the Money Smart Week guidelines. **This feature will be available on November 22.**

To sign up online:

1. Go to [www.moneysmartweek.org](http://www.moneysmartweek.org)
2. Click on the Partner portal on the main page
3. On the Partner's Tools page, click Register to register as a new user or choose Login to sign in and manage your profile.
4. If registering for the first time, you must fill out the new partner profile. After you've registered, you can enter events into the online calendar database application by going to the same page and logging in.
5. You will receive an email with a temporary password. You will have to sign in and create a permanent password. If you forget your password, go back to the same page and click on the "forgot password" link. You will be emailed a new temporary password and must sign in and create a new permanent password.

**All partners wishing to participate and be listed as a partner for the 2012 campaign must register. We will start using this electronic list for all communication from both the Federal Reserve and chairpersons for emails, etc. as of [January 15](#).**

Questions or comments can be directed to:

Tiffany Butler: 312-322-2920

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APRIL 21–28, 2012 | MONEYSMARTWEEK.ORG

## Money Smart Week® Logic Model

Situation: Everyone needs to know how to spend, save, and borrow money wisely to achieve their financial goals. Financial institutions, not-for-profits, schools, libraries and other community partners can join together to support financial education during Money Smart Week.

INPUTS	OUTPUTS		OUTCOMES – IMPACT		
	Activities	Participation	Short term	Medium term	Longer term
What we invest	What we do	Who we reach			
<p><b>People</b> Federal Reserve Staff</p> <p><b>Partners</b> Money Smart Advisory Council &amp; partners– refer to website for list of current organizational members</p> <p><b>Materials</b> calendar of events, posters, inserts, bookmarks, shreds, comics, other Fed promotional materials</p>	<p><b>Planning processes</b> Regular meetings via telephone or in-person</p> <p><b>Kick-off the week</b> with statewide press conferences and local launches</p> <p><b>Capture the attention of consumers and organizations</b> with media stories, promotions, and advertising</p> <p><b>Select winners</b> of state and local contests</p> <p><b>Offer personal money management workshops, seminars, and activities</b> that are mostly free and open to the public.</p>	<p><b>Residents</b> in the Seventh Federal Reserve District, from young people to seniors. Courses in other languages are offered in certain locations</p> <p><b>Community Partners</b> involved in money management education</p>	<p><b>Participants</b> will:  Increase knowledge of effective money management practices and be inspired to be more engaged in their own finances</p> <p><b>Partners</b> will: Increase their knowledge &amp; awareness of the MSW effort; improve relationships with other organizations; be aware of resources &amp; curriculum available for teaching consumers</p>	<p><b>Participants</b> will:  Adopt best practices to manage money more effectively</p> <p><b>Partners</b> will: Strengthen local collaborative efforts through the networking Money Smart Week affords participants.</p>	<p><b>Participants</b> will:  Build long-term financial security and wealth</p> <p><b>Partners</b> will: Create a sustainable environment for personal financial literacy efforts in their communities</p>

# MONEY SMART WEEK®

APRIL 21–28, 2012 | [MONEYSMARTWEEK.ORG](http://MONEYSMARTWEEK.ORG)

## **Federal Reserve Bank of Chicago (FRBC) Policy on Soliciting Financial Support for Money Smart Week®**

**Overview:** Money Smart Week (MSW) is a public awareness campaign designed to help consumers better manage their personal finances. This is achieved through the collaboration and coordinated effort of hundreds of organizations across the state and Midwest including businesses, financial institutions, schools, libraries, not-for-profits, government agencies and the 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.

**Policy Statement:** Money Smart Week partners and planning teams may raise funds and solicit sponsorship of MSW events, materials and activities independent of the FRBC. Direct sponsorship requests and fundraising that is conducted with little to no involvement from the FRBC must be in compliance with this policy.

**Solicitation of Financial Support:** Two models are available to MSW planning teams to use in soliciting financial support for MSW. The first involves partners directly contacting the media for support in funding promotional materials (direct sponsorship). The second is a pooled dollar model where the partners pool all MSW fundraising dollars and the partners as a group decide how to divide the dollars raised to support MSW (pooled funds). If a MSW partner or planning team wishes to use a different means of seeking financial support for MSW, it must provide, in advance, the details of its proposal to the FRBC and receive FRBC's prior approval.

### ***Direct Sponsorship***

The direct sponsorship model can be initiated by the FRBC and/or each planning team. If initiated by the planning team, guidelines about equal access to sponsorship opportunities should be defined by the planning team. If initiated by FRBC, an open call for sponsorships must be made to all participating organizations. For example, if the local newspaper is offering to promote MSW with a paid (usually discounted) insert, all partners must have equal opportunity to fund the publication entirely or as one of multiple sponsors who can purchase ad space within the insert. While the FRBC will have no involvement in the transaction of money once these partner/media relationships are established, it will still maintain an advisory role for content and graphics. Furthermore, the FRBC requires that ads sold within the insert are appropriate and in good taste. Banks may purchase ad space; however, a disclaimer provided by the Fed will be added to absolve the Fed from any support or endorsement of sponsors. The FRBC may, at its discretion, act as a bridge solely to help establish a connection between the potential sponsor and a media partner.

The FRBC may request sponsorship of promotional materials produced by the Fed including the calendar of events booklet, bookmarks, inserts, posters and/or t-shirts. Partners may sponsor pages within those promotional materials that highlight their support of financial education/MSW and/or their planned MSW activities. Sponsorship levels will not be established. Rather, potential sponsors will be informed of the dollar amount range that past sponsors have provided. It will be up to the sponsor to decide based on that information, its sponsorship level. Sponsors that contribute toward the higher end of the sponsorship range; however, may negotiate more prominent placement within the calendar of events booklet. As with media promotional buys, the Fed will not be responsible for any money transactions. Sponsoring partners must work directly with the print vendors to settle sponsorship dollars.

Planning teams may also solicit sponsorship of MSW contests. The rules outlined in this policy apply to contest sponsors. Contest sponsors such as those for the Money Smart Kid scholarship or savings bond raffle will be listed in a factual nature online, in all promotional materials and mentioned in talking points, as well as be allowed to announce contest winners at Fed activities such as the MSW kickoff breakfast.

### ***Pooled Dollars***

The pooled dollars fundraising model must be conducted entirely independent of the FRBC. Recommendations for this type of sponsor participation include:

- An independent (preferably) or partner non-profit should be chosen by whatever means deemed fair and appropriate among all partner organizations to serve as the fiscal agent for MSW funds. The fiscal agent maintains responsibility to account for the collection and use of all fundraising dollars.
- The account should have multiple signers from at least two (2) different partner organizations.
- Dollar goals and needs should be established by consensus and thorough analysis of costs.
- Full disclosure and monthly reports on all funds should be provided to the partner group. These reports should include the details of each individual deposit and withdrawal (name of organization and dollar amount).
- Decisions regarding the fiscal agent should be shared with the partner group at a regular meeting within 30 days of the decision being made.
- A written voting structure should be in place for all decisions that require spending allocated funds.
- Funds should be restricted to marketing and promotional efforts as well as support for events and/or speaker fees.

Marketing and promotional efforts should be in good taste and embody the mission of Money Smart Week. They should not disparage any legal and legit sectors of the financial industry.

**Financial Solicitation Restrictions:** In soliciting support for MSW, partners and planning teams must always maintain a neutral position and never use the name of the Federal Reserve Bank of Chicago or the Federal Reserve System to coerce contributions or support. The FRBC will not endorse any sponsors beyond recognizing their involvement in MSW. The FRBC should be given the opportunity to review any outside promotional campaigns, advertisements and messaging that will be linked to or associated with Money Smart Week campaigns. Any material that is deemed not appropriate by the FRBC and/or the MSW partners' group at large will not be allowed to be used for MSW or include the Money Smart Week logo or affiliation.

**Federal Reserve Bank Trademarks and Service Marks:** Money Smart Week is a registered service mark of the Federal Reserve Bank of Chicago and it may not be used without the FRBC's express written permission. Other trademarks and service marks owned by the Federal Reserve Banks also may not be used without express written permission from the owner of the mark.

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## Action Plan/Timeline

Date	Topic	Description
Oct Meeting	Logos and Partner Kit Available	<ul style="list-style-type: none"> <li>- 2012 logos are available online at <a href="http://moneysmartweek.org">moneysmartweek.org</a></li> <li>- Receive Partner Kit including marketing materials, partner lists, guidelines, etc. Committee review and sign up.</li> </ul>
Nov Meeting	Committees	Finalize all committee coordinators and participants. Start planning events for entry into calendar database.
Dec Meeting	Website Tutorial, Media and Money Smart Kid Contest	<ul style="list-style-type: none"> <li>- Tutorial of website event submission process.</li> <li>- Media partners are contacted about sharing advertising opportunities and their participation ability and level is determined for MSW 2012.</li> <li>- If using Chicago Fed templates for the application packet, please submit all contest details by <b>November 30</b>.</li> </ul>
Jan Meeting	Print Materials and MSKid Contest	<ul style="list-style-type: none"> <li>- All quantities for print calendars, bookmarks, inserts, etc., are due to the Chicago Fed for ordering by <b>January 11</b>. Order form can be found in the Partner Kit. This only applies to states in the Chicago Fed's district. All other materials can be found online.</li> <li>- Market contest questions and guidelines to media/schools/partners.</li> </ul>
<b>January 15</b>	<b>Partner Sign up</b>	<b>Deadline to sign up with new database online is <u>January 15</u>. This includes new and existing partners.</b>
<b>February 15</b>	<b>Database Entry Deadline</b>	<b>Deadline to submit event information in the <i>partner tools</i> section of <a href="http://www.moneysmartweek.org">www.moneysmartweek.org</a> for inclusion in the print calendar.</b> See page 20 for more details. This deadline only applies to have event details in the print calendar in the Chicago Fed's district.
Feb Meeting	Media Kits	Media kits will be provided for individual event promotion.
March Meeting	Survey Packets	<ul style="list-style-type: none"> <li>- Revisit survey expectations and guidelines which can be found in the Partner Kit from October.</li> <li>- Additional details regarding survey monkey and reporting attendance through the database will be distributed via email including instructions on how to upload surveys as well as due dates.</li> </ul>
March	Presenter's Meeting (Recommended – Not Required)	Hold separate meeting for all presenters to distribute survey and presenter materials with guidelines and expectations. See Partner Kit for details.
Mar	Kick-Off Event RSVP deadline	Deadline for RSVPs for the kick-off event.
April 19-April 25	Kick-Off Event	Kick-Off events takes place to launch Money Smart Week 2012. Check with your local chairperson for specific date/time.
May 18	Measurement Materials	All surveys, photos and additional feedback/reports due back to the Fed via SurveyMonkey, database and email.
June-July	Wrap-up	Wrap-up meetings to discuss results and celebrate success.



# MONEY SMART WEEK®

APRIL 21–28, 2012 | [MONEYSMARTWEEK.ORG](http://MONEYSMARTWEEK.ORG)

## Committee Descriptions, Roles & Responsibilities

**(Recommended – committees and descriptions vary by regional planning teams and need)**

**College & University** – Like the Workplace Committee, this group will reach out to colleges and universities to secure on-site programming for students. Also, the committee will develop a promotional strategy for reaching and encouraging students to participate in MSW activities at their school or in the community.

**Kick-Off** – This committee will execute the planning for the kick-off event usually held the first day of the week or during the week prior. This committee will recommend and secure a venue, speakers, invitee list, agenda, room set-up and possibly a sponsor.

**Measurement** – This committee will be responsible for following-up with partners to ensure everyone submits their partner and participant surveys as well as event attendance numbers. Additionally, this committee will collect copies of any event photos or promotional materials created by partners. The committee will then report all data to the Chicago Fed for result compiling.

**Media** – This committee will leverage media relationships to secure publicity through local television, radio and print outlets. Pitches will be made for coverage prior to and during the campaign. This committee will also be responsible for creating a speaker's bureau with varying expertise to be "on-call" to promote the week through the media.

**Money Smart Kid** – This committee will be responsible for finalizing the essay contest question, rules and guidelines. The committee will also be responsible for promoting the contest through the school systems and the media if possible. Essays will have to be reviewed by the group to determine finalists, then the committee interviews each finalist to pick a winner. The committee will also be responsible for securing a scholarship or other prizes for the winner and finalists.

**Programming/Curriculum** – This committee will work with the partner group to determine available program topics/presenters and venues. The committee will monitor details to keep duplication of programming to a minimum, as well as facilitate the scheduling of programs at libraries, schools, community centers, etc.

**Promotion** – This committee will be responsible for an overall strategy to promote the week in the community and media. This group will be in charge of the distribution of calendars, flyers, posters, bookmarks or any other collateral materials that are created to promote the website/calendar of events. Calendars and promotional materials have typically been distributed through partner organizations, local schools and library systems, at festivals, fairs or sporting events, as well as high traffic areas of the city/county.

**Workplace** – This committee will create a strategy to reach businesses for on-site employee programming. This group will identify and schedule volunteer partners to conduct such events. The committee will also encourage businesses to use their own financial education materials/resources during MSW and/or promote the overall campaign. Committee may choose to leverage the Fed and facilities to host an event for potential new corporate partners.

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**Committee Structure**

Committee Chair

Committee Members (three or more)

Chicago Fed– involved in all committees

**Meeting Schedule**

To be determined by committee. Meetings can be ‘in-person’ or via teleconference. At least one meeting in-between the general monthly planning meetings is preferred.

**Reporting Structure**

Committee chairs will be expected to provide an update at each general planning meeting to inform the group at large, as well as seek guidance and advice on projects. As stated above, the Chicago Fed will be involved with each committee to participate at meetings, offer resources and provide guidance.

# MONEY SMART WEEK®

APRIL 21–28, 2012 | [MONEYSMARTWEEK.ORG](http://MONEYSMARTWEEK.ORG)

## Best Practices

### Events

#### **Creative Events/Topics:**

- Advanced Funeral Planning
- How to Find a Great Job and Increase Your Earnings
- Health Savings Through Exercise
- Supermarket Smarts
- Surviving Divorce Financially
- Charitable Giving
- Gambling: Deal or No Deal
- How to Find the Best Deal on Your Apartment
- Buying or Leasing – What’s the Best Auto Deal for You
- Protect Yourself Against Fraud & Scams
- Community Shred Day
- Free Financial Counseling for a Day

**Activity Hubs:** Use one or more facilities that host the majority of events multiple times a day to increase the likelihood of participants attending more than one class. Schools or community centers have been the most successful venues.

### Participation

**Extra Credit:** Teachers and professors gave extra credit for attending classes and submitting a report.

**Money, Gifts & Food:** Door Prizes; food and refreshments; registration to win cash or a savings bond when you attend a class and fill out a survey.

**Not-for-Profit Clients:** Special meeting inviting Executive Directors from local agencies to hear Money Smart Week message and link clients with MSW partners/presenters.

**Workplace:** Special meeting inviting local Human Resource Managers and/or CEOs to hear Money Smart Week’s message while linking employees with MSW partners and presenters.

### Media & Promotion:

- \$100 bill inserts with pizza deliveries, grocery bags
- Ben Franklin tour – community events, schools, MSW events, kick-off events, rotary clubs, etc.
- Newspaper partner to print and distribute calendars
- Statement stuffers
- Operation Greenlight (turning building façade or exterior lights green)
- Special meeting inviting local media to hear Money Smart Week message and cover event
- Media personality to Emcee kick-off or other event

# MONEY SMART WEEK®

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## Online Calendar

As a Money Smart Week Partner, the Federal Reserve Bank of Chicago provides partners with the ability to upload events online to populate a searchable calendar for consumers. Some planning teams and states use this information to make print calendars. Check with your local chairperson for details. Other regions are encouraged to promote the online database to consumers.

Should you encounter any errors or non-functioning features, please let us know right away. Your first contact for tech support should be Mariann Rapp at [Mariann.Rapp@chi.frb.org](mailto:Mariann.Rapp@chi.frb.org) or 312-322-2353.

Here are the initial steps to access the database:

1. Go to [www.moneysmartweek.org](http://www.moneysmartweek.org).
2. Click on the Partner portal on the main page.
3. If you have not already signed up as a partner, see page 12 to learn how to register.
4. Login with your user name and password.
5. Begin entering events by choosing the **Create a New Event** button.

**Questions or comments can be directed to:**

Tiffany Butler: 312-322-2920

# MONEY SMART WEEK®

APRIL 21–28, 2012 | [MONEYSMARTWEEK.ORG](http://MONEYSMARTWEEK.ORG)

## Discussion Forum

An online discussion tool is available for partners. The application will serve as a communication forum for partners to exchange resources, ideas, special requests, questions and comments for Money Smart Week, as well as ongoing financial literacy initiatives throughout the year. The Chicago Fed will be posting coordinating documents, meeting minutes and other important information here, so you are encouraged to sign up.

Upon entering the forum, you will be able to view and read posts from other partners; however, you will be prompted to register if you wish to reply or create a new post. The register link is located at the top of the page. Screens will then direct you through the registration process.

Discussion threads for Money Smart Week committees will always remain at the top of the forum. New topics or posts will be displayed directly below the committee threads.

Chicago Fed representatives will monitor discussions.

## Follow these simple steps to access the forum:

1. Go to [www.moneysmartweek.org](http://www.moneysmartweek.org).
2. Click on the Partner portal on the main page.
3. The Discussion Forum will be in the center of the page.
4. Enter username: **msw** and password: **msw\$\$\$**
5. Once in the forum, choose your host city, register and communicate.

Please note: This will feature a different user name and password than the calendar database and partner sign-up.

## Questions or comments can be directed to:

Tiffany Butler: 312-322-2920

# MONEY SMART WEEK®

APRIL 21–28, 2012 | [MONEYSMARTWEEK.ORG](http://MONEYSMARTWEEK.ORG)

## Survey Information

As Money Smart Week partners we ask that at the conclusion of Money Smart Week you complete and return attendance numbers for all events, partner surveys, participant surveys, photos, media clips and samples of any other promotional materials used during the campaign.

The surveys are an important tool for us to obtain consumer feedback. We ask that you take attendance and collect consumer surveys at each of your events and submit that information by May 18, 2012. Partner and consumer surveys must be electronically submitted via SurveyMonkey. The partner and consumer survey links will be sent out at the end of the campaign. Attendance numbers can be submitted through the event database. You will receive an email after your event ends prompting you to click a link and submit your attendance for each class. If you submit more than one number for the same event, the last number entered will stand.

Please remember to take pictures at your events and submit them to us with names, dates, places, etc. by the same date. These action shots that communicate teaching and learning will be used in the Annual Report. All pictures and promotional materials can be sent to: [Tiffany.Butler@chi.frb.org](mailto:Tiffany.Butler@chi.frb.org).

## Questions or comments can be directed to:

Tiffany Butler: 312-322-2920

# MONEY SMART WEEK®

APRIL 21-28, 2012 | [MONEYSMARTWEEK.ORG](http://MONEYSMARTWEEK.ORG)

## Online Marketing Materials

Partners can download Money Smart Week promotional items at [www.moneysmartweek.org](http://www.moneysmartweek.org). Click on the Partner portal to download materials. 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 Bob Dlotkowski, Chicago Fed at 312-322-5648. Examples below may not reflect your state/dates.

## Logos

Logos can be placed on a wide array of materials to promote Money Smart Week activities.



## Posters

Posters are another marketing tool. Available sizes are either 8 1/2" x 11" or 11" x 17" and come in two versions: customizable and "ready to go" (print-ready). Below is the print-ready version.



## Bookmarks

Bookmarks are normally distributed through local schools and libraries. Below are three different options available. The front is standard, but any of the three graphics can be used on the back.



## Inserts

Inserts are typically used as invoice/billing statement stuffers or distributed to customers at local retail venues such as at bank teller windows, in grocery bags or with pizza deliveries, etc.



## T-shirts

T-shirts have been used by partners for various promotional activities prior to or during Money Smart Week. They can also be worn by volunteers who accompany "Ben Franklin" at designated events.

Please contact Bob Dlotkowski directly to obtain eps documents for images used on front and back of shirts.



Front





**Promotional Order Form – Federal Reserve 7<sup>th</sup> District (Chicago Fed) Only**  
**To Be Submitted to Chairperson – Chairperson will send one order to the Fed**

Deadline is January 11, 2012

Planning Team (city, county, region name)

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**Bookmarks (Quantity)** \_\_\_\_\_

**Calendars (Quantity)** \_\_\_\_\_

Submit calendar quantity only if the Chicago Fed is laying out a calendar booklet. Planning teams solely using local newspapers do not need to complete.

**Comic Books (Quantity)** \_\_\_\_\_ **To be ordered in quantities of 50**

'Be Money Smart' comics feature Ben Franklin and target middle school kids.

**Inserts (Quantity)** \_\_\_\_\_

Also know as statement stuffers, mail inserts.

**Posters (Quantity)** \_\_\_\_\_

Largest posters that can be supplied for free are 11" by 17".

**Shredded Money (Quantity)** \_\_\_\_\_ **To be ordered in quantities of 75**

Packets of Chicago Fed shredded money with Money Smart Week website on packaging.

**Shipping Contact:**

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone number: \_\_\_\_\_

Date: \_\_\_\_\_

Please indicate if any promotional materials are needed by a certain date. Allow for 10-14 days for delivery.

Note to Chairperson: Please collect all forms from partners and combine into one order form. Shipments will be to one location.

Email or Fax form back to Tiffany Butler no later than January 11<sup>th</sup>. Items are posted online at [moneysmartweek.org](http://moneysmartweek.org) as well as displayed in the 2012 Partner Kit.

**Tiffany.Butler@chi.frb.org Fax: (312) 322-5515 Phone: (312) 322-2920**

# MONEY SMART WEEK®

APRIL 21–28, 2012 | [MONEYSMARTWEEK.ORG](http://MONEYSMARTWEEK.ORG)

## **Suggested opening script for all adult MSW Events:**

Welcome to [name of your event]. [Details about your event]. Today's class/activity is one of hundreds of free financial education events that are occurring all over the country in connection with Money Smart Week, created by the Federal Reserve Bank of Chicago. Financial institutions, government agencies, not-profits, libraries and schools are joining forces to raise awareness about financial education and provide resources to the public at large. Because this is a Money Smart Week event, all content will be void of sales pitches and will not refer to my company's/organization's products or services unless used as an example or asked about by participants. [Please provide Money Smart Week calendars to participants (if available) to invite them to other events and/or direct them online to [moneysmartweek.org](http://moneysmartweek.org)].

Each of you has a short survey. We ask that you take a few minutes at the conclusion of the class to provide some feedback about today's discussion as well as how you heard about us. This information is very important to maintain quality and determine the best ways to inform you of next year's event. Please note that there is also an email address and website should you want to submit additional comments online.

Lastly, you have a signup sheet if you wish to be informed about future Money Smart Week campaigns as well as free financial education activities throughout the year. As with the Money Smart Week events, you will not be solicited or marketed any products by signing up. If you'd like to be added to that email list, please check the box to the left and complete your contact information at the bottom. You may also check the 'follow-up with me' box if it's ok for Money Smart Week coordinators to contact you in the future to complete a post event survey and/or help with next year's promotional efforts by informing others about how you or your family benefited from what you learned during Money Smart Week.



APRIL 21-28, 2012

# Consumer Survey

Event Date: \_\_\_\_\_

Event Title: \_\_\_\_\_

Event Location (City): \_\_\_\_\_

The following survey helps us understand how we can improve Money Smart Week and make sure the events we offer reach the widest possible audience. Your answers are completely anonymous and cannot be used in any way to identify you.

1. What is your gender?  Male  Female

2. How old are you?  Under 18  18 – 24  25 – 34  35 – 49  50 – 65  Over 65

3. What is your ethnicity?  African-American  Asian  Hispanic  White (non-Hispanic)  Other

4. What is the highest level of education you attained?

Some high school  High school or GED  Some college  College degree  Graduate Degree

5. How valuable did you find the Money Smart session you just attended?

1 Not at all valuable    2 Not valuable    3 Valuable    4 Very valuable

6. How likely are you to apply or take action on something you learned in today’s class?

1 Very Unlikely    2 Unlikely    3 Likely    4 Very likely

7. How likely are you to recommend a Money Smart event to your friends and family?

1 Very Unlikely    2 Unlikely    3 Likely    4 Very likely

8. How did you hear about the event you attended? Please check all that apply

- Event Calendar Booklet (Where did you get the calendar?) \_\_\_\_\_
- Television (Which station?) \_\_\_\_\_
- Radio (Which station?) \_\_\_\_\_
- Newspaper (Which paper?) \_\_\_\_\_
- Email (From?) \_\_\_\_\_
- Website (Which site?) \_\_\_\_\_
- Mail insert (In what mail?) \_\_\_\_\_
- Friend, Family, Teacher, etc. (Word of mouth) \_\_\_\_\_
- Social Media (Facebook, Twitter, etc.) \_\_\_\_\_
- Other (Please specify) \_\_\_\_\_

9. Have you ever visited MoneySmartWeek.org?

Yes  No

10. What financial topics are you most interested in? \_\_\_\_\_

11. Please provide additional comments or suggestions on the back of this page

Additional question, comments or concerns about sales pitches at your event? E-mail us at [Money.Smart@chi.frb.org](mailto:Money.Smart@chi.frb.org) or visit us online at [moneysmartweek.org](http://moneysmartweek.org) to submit a comment.



APRIL 21-28, 2012

# Encuesta al Consumidor

Fecha del Evento: \_\_\_\_\_

Título del Evento: \_\_\_\_\_

Local del Evento:(ciudad): \_\_\_\_\_

La siguiente encuesta nos ayuda a nosotros a entender como podemos mejorar Money Smart Week y asegurar que los eventos que ofrecemos alcancen la mayor audiencia posible. Sus respuestas son completamente anónimas y no pueden ser usadas de ninguna manera para identificarle a usted.

1. ¿Cuál es su género?  Masculino  Feminino

2. ¿Qué edad tiene usted?  Menos de 18  18 – 24  25 – 34  35 – 49  50 – 65  Más de 65

3. ¿Cuál es su etnicidad?  Africano-Americano  Asiático  Hispano  Blanco (no-Hispano)  Otro

4. ¿Cuál es el nivel más alto de educación que usted atendió?

Alguna Escuela secundaria  Escuela secundaria o GED  Algo de colegio  Grado universitario  Post grado

5. ¿Qué valor encontró en la sesión de Money Smart que usted atendió?

1 No de mucho valor    2 Nada de valor    3 De valor    4 De mucho valor

6. ¿Qué posibilidades hay de que usted cambie la manera en que maneja el dinero debido a lo que usted ha aprendido?

1 No muy posible    2 No posible    3 Posible    4 Muy posible

7. ¿Que posibilidades hay de que usted recomiende el evento de Money Smart a sus amigos y familia?

1 No muy posible    2 No posible    3 Posible    4 Muy posible

8. ¿Como usted escuchó sobre el evento que atendió?

Calendario (¿Dónde consiguió el calendario?) \_\_\_\_\_

Televisión (¿Cuál estación?) \_\_\_\_\_

Radio (¿Cuál estación?) \_\_\_\_\_

Periódico (¿Cuál periódico?) \_\_\_\_\_

Correo electrónico (De Quien?) \_\_\_\_\_

Página de internet (¿Cuál?) \_\_\_\_\_

Correspondencia insertada (¿Cuál Correo?) \_\_\_\_\_

Amigo/Familia/Maestro (¿Por otra persona?) \_\_\_\_\_

Media Social (¿Facebook, Twitter?) \_\_\_\_\_

Otro (Por favor especifique) \_\_\_\_\_

9. ¿Has visitado el sitio del internet MoneySmartWeek.org?

Si  No

10. ¿En Cuales tópicos financieros estas mas interesado? \_\_\_\_\_

11. Por favor provea comentarios adicionales o sugerencias en la parte atrás de esta página  
Por otra persona

¿Preguntas adicionales o comentarios? Envíenos un e-mail a [Money.Smart@chi.frb.org](mailto:Money.Smart@chi.frb.org) o visite [www.moneysmartweek.org](http://www.moneysmartweek.org)

## Consumer Signup Sheet

# Let's stay in touch!

**Sign me up for the Money Smart email list**

You will be sent notifications throughout the year about free financial education events including Money Smart Week activities for next year. This list **will not** be used for solicitation purposes.

**Follow-up with me later in the year**

In an effort to continue improvement of programming and be more impactful, Money Smart Week coordinators would like to hear about how you applied what you learned to enhance your financial management skills. Post surveys will be conducted approximately 3 months after Money Smart Week.

Also, if you have a success story to tell we'd love to help you communicate it through media and promotional efforts for next year's campaign!

### Contact information

Name: \_\_\_\_\_

City/State in which you live: \_\_\_\_\_

Email: \_\_\_\_\_

Phone number (optional): \_\_\_\_\_

## Presenter's Checklist

- Provide opening & Money Smart Week (MSW) talking points at event
- Distribute and collect surveys
- Distribute and collect consumer signup sheets
- Arrange for photos (action shots that communicate teaching/learning)
- Record the number of participants and report attendance through the online calendar application or to the partner who submitted/created the event detail within the application. If you do not know who created and added your event online, report your attendance to the MSW planning team chair or your company's MSW liaison.
- Submit surveys – See page 22
- Submit consumer signup sheets to your MSW Chairperson or company MSW liaison.