



America**Saves**[®]

You Can Build Wealth

America Saves Week

February 25 – March 4, 2007

A Guide for Extension Educators

Content:

Why, How, and What Can Happen
Three Levels of Participation
Resource Tool Kit

This working document was prepared by a team of Cooperative Extension professionals and the America Saves team at the Consumer Federation of America. To access the most current version of this document on-line, go to <http://www.csrees.usda.gov/fsl>, go to 'Educator,' then 'Initiative Program Toolkit,' and then 'America Saves.' August 2006

WHY

You will be able to see financial action--savings, debt reduction, wealth building--as a result of your financial education activities during *America Saves Week*. The *America Saves* campaign provides additional motivation and products that allow even small savers to succeed.

HOW

Resources, orientation and technical assistance is provided by the *America Saves* campaign. You provide the local organizing that brings institutional partners together with banks and credit unions to promote and provide saving, debt reduction and wealth building activities. Activities encouraged for different types of partners are listed in this guide. Many of your current activities can also be leveraged to involve participants in *America Saves Week*.

WHAT CAN HAPPEN

Results of *America Saves Week* can be dynamic: New relationships (the *America Saves* campaign already involves more than 1,000 organizations, institutions, and companies and over 300 banks and credit unions), new opportunities for funding, increased program participation, and data that is quantifiable--numbers of people participating, dollars saved or debt reduced, assets purchased, investments made, description of saving goals and savers' choice of financial institutions.

Through Extension-supported efforts, 31 local *America Saves* campaigns in 20 states have enrolled 17,809 participants, saving an estimated \$7.5 million (2002-05).

America Saves Week - February 25 to March 4, 2007 is a natural extension of the work that you're already doing to promote financial literacy in the communities that you serve. The difference is that *America Saves Week* is part of a long-term social marketing campaign designed to encourage and empower individuals to make a personal commitment to saving and investing for their future.

America Saves Week is a week of intensive focus on financial action such as saving, reducing debt, and investing. *America Saves Week* is also unique in that the week is the focus, but not the end or beginning; activities can occur previously and be announced during the week, or can be announced and conducted after the week.

America Saves Week benefits to Extension educators include:

- Building local partnerships and networks related to financial education
- Increased visibility through local media
- State and national collection and aggregation of evaluation data
- Marketing and expansion of existing financial education programs
- Flexibility to develop programs for local needs and cultural relevancy
- User-friendly materials and administrative support from the Consumer Federation of America
- An opportunity to highlight annual financial accomplishments

You are encouraged to use existing resources such as curricula, community advisory groups, and other resources that you already have. Realizing that people's schedules and time availability vary, three levels of participation are outlined here and further described later in this guidebook:

- Time very limited? Use **Level 1**, which focuses on awareness and marketing.
- A little more time? Try **Level 2**, which includes building and expanding local partnerships.
- Want to get really involved? Try **Level 3** and organize a local *America Saves Week*. Small mini-grants will be available to assist you in your efforts.

We recommend you organize your *America Saves Week* around a slogan or theme such as "Make it Automatic," "Max Your Match," "Pay Yourself First," "Savings Serve Seven Generations," and "From Every Dollar Save a Dime."

America Saves campaign was first introduced to Cooperative Extension in 2002 as part of the "Financial Security in Later Life" National Extension Initiative. See www.csrees.usda.gov/fsll (go to Educator, then Program Toolkit) for details. The most recent impact report can be found at www.csrees.usda.gov/financialsecurity (go to Impacts and Results). The main web site for the *America Saves* campaign is at www.americasaves.org.

For further information and questions, contact

Nancy Register, Director, *America Saves*, nregister@consumerfed.org or
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THREE LEVELS OF PARTICIPATION

Level One

Extension stand-alone campaign

Responsibilities:

- Identify your campaign goal or goals to be announced as part of *America Saves Week* (correlate to evaluation measures)
- Incorporate *America Saves Week* message into regularly scheduled programs
- Talk up *America Saves Week* in regular activities and networking
- Distribute posters and brochures
- Enroll savers and send in completed enrollment forms
- Seek local media coverage

Evaluation Measures:

- Number of brochures distributed
- Number of completed enrollment forms (savers)
- Number of published or aired media pieces

Level Two

Extension plus at least one organizational partner

Responsibilities:

All of the above, plus,

- Offer, or sponsor, Saves Motivational Workshops – training and resources provided
- Partner with financial institutions to open savings accounts
- Partner with employers to promote increased participation in 401k, 403b, and 457 plans

Evaluation Measures:

Level One measures plus:

- Pre/Post Questionnaire and Speaker Evaluation of motivational workshops
- If part of ongoing campaign, number of people successfully called during *America Saves Week* who answer evaluation questions about savings patterns
- Number of volunteer hours contributed

Level Three

Extension plus multi-organization campaign network

Responsibilities:

All of the above, plus

- Develop a partnership or coalition of financial institutions, businesses, government officials/agencies, not-for-profit organizations, educational institutions, and faith communities to:
 - Execute community marketing strategies
 - Each announce at least one measurable goal
 - Sponsor and organize *America Saves Week* activities (within participating organizations and/or for the wider community)

Evaluation Measures:

Same as Levels One and Two, plus

- Number of coalition members or community supporters
- If part of ongoing campaign, Pre/Post Questionnaire and Speaker Evaluation of savers' clubs presentations
- List of actions taken by coalition members, e.g. no fee savings accounts opened by Financial Institutions, new IDA accounts opened, number of congregants signed up for America Saves by religious institutions
- Funding received from grants or community partners

America Saves Week timeline by levels

Below are some suggested guidelines for preparing for America Saves Week. Feel free to adjust as needed. It is assumed that activities listed in an earlier time frame may continue into later months.

Level One

Extension stand-alone campaign

Activities	Dec.	Jan.	Feb.	Mar.	Apr.
Promote event	•	•	•	•	
Plan ASW activities	•	•			
Enroll savers	•	•	•	•	•
Publish press release			•	•	
Evaluate ASW				•	•
Publish post-ASW press release					•

4 months before *America Saves Week*

- Tell Jim Terry at CSREES-USDA that you plan to be involved (jterry@csrees.usda.gov). Copy Jane Schuchardt at jschuchardt@csrees.usda.gov. Include a brief summary of planned activities and complete contact information.
- Begin *America Saves Week* publicity at programs and in Extension communications (e.g., web site, newsletters and newspaper columns) and media outlets (e.g., radio and television).
- Begin talking up *America Saves Week* in regular activities and networking
- Begin to develop a list of planned programs where the opportunity exists for *America Saves Week* enrollment.

3 months before *America Saves Week*

- Discuss coordination of *America Saves Week* activities with office colleagues (e.g., 4-H youth development, community economic development, agricultural agents), advisory groups, and others
- Continue publicity and program planning
- Seek endorsements from local business, non-profit, and community leaders
- Order *America Saves Week* materials from Nancy Register (nregister@consumerfed.org) at the Consumer Federation of America
- Begin enrolling American Savers and send enrollment information to the Consumer Federation of America

2 months before *America Saves Week*

- Arrange *America Saves Week* publicity efforts with local media (e.g., feature article, press conference, talk show appearance, online chat)
- Take registration for *America Saves Week* events and monitor enrollment

1 month to one week before *America Saves Week*

- Actively pursue promotion and registration for *America Saves Week* activities
- Prepare certificates of appreciation for *America Saves Week* participants and volunteers

During *America Saves Week*

- Implement planned activities
- Complete evaluation instruments at *America Saves Week* events

One week to one month after *America Saves Week*

- Prepare a summary report that includes a description of *America Saves Week* activities, number of enrolled American Savers, planned behavior changes, media hits and coverage, participant comments, positive collaborative relationships and unexpected outcomes
- Make a commitment to become involved with *America Saves Week* in 2008

Level Two

Extension plus at least one organizational partner

Activities	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.
Promote event	•	•	•	•	•	•
Partner with community organizations and financial institutions	•	•	•	•	•	•
Plan ASW activities		•	•			
Enroll savers		•	•	•	•	•
Publish press release				•	•	
Organize post-ASW event				•	•	
Evaluate ASW					•	•
Publish post-ASW press release						•

Participating in a Level Two *America Saves Week* campaign requires an additional commitment of time to build relationships with financial institutions, employers, and other partners to actively promote *America Saves Week* participation.

In addition, you will be organizing targeted *America Saves Week* motivational workshops. For this reason, we recommend an additional month of time (i.e., 5 months of lead time) to make the necessary contacts.

Level Three

Extension plus multi-organization campaign network

Activities	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.
Partner with community organizations and financial institutions	•	•	•	•	•	•	•	•
Develop master activity list		•	•	•	•	•		
Promote event		•	•	•	•	•	•	
Enroll savers				•	•	•	•	•
Publish press release						•	•	
Organize post-ASW event						•	•	
Evaluate ASW							•	•
Publish post-ASW press release								•

Participating in a Level Three *America Saves Week* campaign requires a commitment to provide leadership to a sustained campaign effort, either by observing *America Saves Week* annually or engaging in a traditional year-round campaign.

You will be managing the process of performing activities listed above in Levels One and Two, plus providing leadership to a coalition of community partners. For this reason, we recommend an additional month of time (i.e. at least 6 months of lead time) to make the necessary contacts.

RESOURCE TOOL KIT

The following pages provide extension educators with a variety of resources and tools for a successful *America Saves Week*:

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The Consumer Federation of America will provide extension educators with the following materials in fall 2006. George Barany at the Consumer Federation of America is the contact person for further information (gbarany@consumerfed.org).

- *America Saves Week* flyer
- Graphic elements for marketing materials and co-branding guidelines
- Template for kick-off invitation and invitation to join *America Saves Week* coalition
- Internet marketing tips and how to use *America Saves* campaign website
- Sample *America Saves Week* proclamations and press release(s) in Spanish and English
- Template recognition/appreciation certificates and letters
- 2006 *America Saves* campaign impact report
- Other media materials (PSAs)
- One-page background paper on social marketing

Integrating *America Saves Week* With Existing Cooperative Extension Programs

Prepared by: Barbara O'Neill

Cooperative Extension educators are very busy people! Therefore, it is often difficult to find the time to implement new educational programs. With *America Saves Week*, limited time availability need not be a concern. *America Saves Week*-related events can easily be infused into existing Extension programs. In addition, *America Saves Week* program materials have already been developed by the Consumer Federation of America and the *America Saves Week* Extension Team and are available to “pick up and run with.”

Below is a brief description of over a dozen Cooperative Extension programs, or financial education programs that Extension faculty often participate in, where *America Saves Week* can easily be integrated.

- **Bankruptcy Financial Education-** As part of conducting a mandated course for bankruptcy filers in cooperation with the U.S. Department of Justice, encourage participants to enroll as American Savers as part of the process of “starting over” with improved financial practices, such as saving.
- **Building Native Communities-** Incorporate *America Saves Week* participation and culturally relevant experiential activities into financial education programs for Native American populations.
- **Community Economic Development (CED) -** Celebrate *America Saves Week* with CED program participants and community partners. Stress that increased savings provides capital for local business expansion.
- **Financial Education Programs for Agricultural Producers-** Encourage farmers, fisherman, and ranchers and their families to save for the future with targeted *America Saves Week* programs and messages.
- **Financial Security in Later Life (FSL) -** Encourage *America Saves Week* participation when conducting FSL programs such as *Legally Secure Your Financial Future*, *Investing for Your Future*, *Take the Road to Financial Security in Later Life*, and *Catch Up Strategies for Late Savers*.
- **4-H-** Develop *America Saves Week* activities for 4-H club members and/or other existing youth programs (e.g., Piggy Bank Pageant, Roll Your Change Day, Money Camp, role plays, skill-a-thons).
- **Individual Development Account (IDA) Financial Education-** Incorporate *America Saves Week* activities into existing IDA financial education programs that are generally mandatory before participants receive their matching funds. Encourage participants to enroll as

American Savers for additional motivation and support to reach their IDA program goal (e.g., homeownership).

- **Money Talk Financial Class Series for Women-** Include a discussion of *America Saves Week* and ways to “find” money to save. Encourage class participants to enroll in *America Saves* at each session.
- **National Endowment for Financial Education® (NEFE) High School Financial Planning Program (HSFPP) -** Incorporate *America Saves Week* into teacher training programs and HSFPP state newsletters.
- **Newsletters and Newspaper Columns-** Devote an article to promoting *America Saves Week* and saving, in general. Include specific savings strategies and/or online savings resources.
- **Reality Simulations-** Conduct a simulation during *America Saves Week* and stress the importance of regular savings as part of the debriefing process afterwards. Display *America Saves Week* materials at the simulation “storefronts.”
- **Small Steps to Health and Wealth™ (SSHW)-** Use *America Saves Week* as a backdrop to conduct a SSHW class and encourage learners to register as both SSHW participants and American Savers. Since SSHW integrates health and financial topics, Extension educators who primarily teach nutrition and health topics can still get involved. See <http://www.rce.rutgers.edu/healthfinance/smallsteps.asp> for details.
- **Volunteer Development Activities and Extension Homemaker Clubs-** Train volunteers to develop and/or staff *America Saves Week* activities (e.g., exhibits), market *America Saves* and enroll American Savers, conduct motivational seminars, and/or serve as wealth coaches.
- **Volunteer Income Tax Assistance (VITA) -** Develop targeted messages that encourage VITA program clients to save at least part of their tax refund and to join *America Saves*.

Remember, *America Saves Week* is not “more work to do,” but rather, an opportunity to enhance Existing Extension programs. Participation in *America Saves Week* also provides a wonderful opportunity to increase local visibility for Cooperative Extensions and to build or expand community partnerships. Take advantage of this wonderful annual opportunity to spotlight your financial education accomplishments.

Activity List For A Successful *America Saves Week*

Prepared by: Jennifer Abel (lead), Joan Goodman, Sharon Gilbert

***America Saves Week* activities for youth**

- Piggy bank pageant—Kids design piggy banks and the best ones win prizes
- Create poster contest on saving
- Hold one-day family financial fair—activities for kids, adults, elders
- Get Reality Store/Reality Check participants to sign up as savers
- Build a penny walk—each penny represents a story from each person's relatives
- Get scouting patch for America Saves
- Have 4-H clubs create an *America Saves Week* cheer/song
- Intergenerational—have grandmas and grandpas teach their savings techniques to young people

***America Saves Week* activities for participants in Extension programs**

- Roll coins in paper wrappers for participants
- Hold one-day family financial fair—activities for kids, adults, elders
- Incorporate America Saves into Healthy Lifestyles Expo
- Investment University—hold one day workshop series for adults
- Offer mini-workshops on specific topics for diverse ages and audiences
- Use the “Integrating *America Saves Week* With Existing Cooperative Extension Programs” tip sheet
- Train the trainers before the week and ask trainers to conduct workshops and events
- Make and distribute bookmarks, buttons, etc.
- Promote save-your-change week
- Distribute materials at policy council meetings, local sporting events, through schools
- Pick a theme for the week, such as “Make savings automatic” or “Savings serve seven generations” and get all partners to promote the theme
- Create PSAs, articles, interviews
- Take lots of photos, post everywhere possible
- Paint murals on construction barriers
- Save change in an oil can (coins stay in oil until jar is full, reduces temptation to take money out)
- Develop more mottos and slogans
- Intergenerational—have grandmas and grandpas teach their savings techniques to young people
- Make a savings quilt—blocks would show for what and how you're saving
- Be a savings buddy—each person set a goal and support each other's progress
- Visit your buddy at home or go shopping together to talk about savings
- Campus savings drives—save for spring break
- Prepare savings rewards coupon books
- Create calendars with monthly savings tips and distribute at events

***America Saves Week* activities for creating a lot of visibility**

- If your county, municipality, or tribal council agrees to do a proclamation for *America Saves Week*, ask the local paper to print a photo of coalition partners standing with the official while he/she makes the proclamation.
- If you hold an annual reception for volunteers, schedule it during *America Saves Week* to provide another opportunity for spreading the message
- Hold a concert featuring local talent and ask performers to encourage attendees to sign up for America Saves
- “Signs of Savings:” Create large posters to display in office or at workshops that highlight the successes of local savers.
- Display lawn stake signs (like the kind used to promote candidates before elections) in area businesses
- Organize an art exhibit with savings-themed pieces. This could be done through schools and feature kids’ art projects, in an actual gallery, outdoors if your community has any public art spaces, in community centers, etc.
- Create a ribbon for *America Saves Week*, like the pink ribbon for breast cancer awareness or the blue ribbon for child abuse prevention. These ribbons (green would be a good color) could be distributed during *America Saves Week* to all workshop and other event participants. Attach them to cards with the *America Saves* logo and the week’s theme written on them. Make larger ribbons and encourage all coalition partners (if doing a Level 3 campaign) to put them on the doors to their offices.
- Banners across streets

***America Saves Week* activities for employers**

- Distribute America Saves fliers and brochures
- Display Saves posters
- Send one or more stock emails regarding *America Saves Week*
- Place *America Saves Week* article(s) in internal newsletter
- Enclose a *America Saves Week* flier as a payroll stuffer
- Place a notice of and information about *America Saves Week* on internal computer system
- Place a link to America Saves on company website or internal network
- Increase 401k participation and contributions through one or more motivational workshops
- Provide access to no-fee savings accounts through *America Saves* enrollment, presentation(s), motivational workshop(s), and or topic seminar(s) i.e. Earned Income Tax Credit (EITC), homeownership, auto purchase
- Host an event featuring America Saves and 401(k) plans

***America Saves Week* activities for financial institutions**

- Target a number of new savings accounts to be opened
- Target a number of new savings accounts to be opened specifically for low-to-moderate income families
- Target a number of low cost CDs to be opened
- Target a number of Savings Bonds Series I to be sold
- Distribute *America Saves Week* fliers at branches
- Make available *America Saves Week* fliers at teller windows

- Make available America Saves brochures and enrollment forms at teller windows
- Host motivational workshops with partner organizations such as schools, non- profits or at a libraries
- Enclose *America Saves Week* brochure, flier in statement envelopes
- Feature *America Saves Week* on website
- Put a link on website to America Saves
- Use *America Saves Week* as part of Bank at Work presentations
- Target a number of Bank at Work presentations as part of *America Saves Week*
- Send a number of bank staff into schools to provide financial education and America Saves enrollment as part of the week
- Feature *America Saves Week* in advertising campaign
- Hold a public relations event promoting *America Saves Week* and the commitment of targeted numbers

***America Saves Week* activities for non-profit organizations**

- Distribute *America Saves Week* fliers, brochure and/or posters
- Place *America Saves Week* article in newsletter and/or community newspaper
- Host motivational workshops for clients, constituents, members
- Declare a goal of new savings accounts to be opened, dollars to be saved, homes to be purchased, new business to be opened, students to attend college
- Host Earned Income Tax Credit (EITC) workshops
- Establish Volunteer Income Tax Assistance (VITA) sites
- Organize local Money Fairs at the public library

***America Saves Week* activities for political leaders**

- Issue proclamations
- Offer public endorsements
- Provide mailings encouraging others to be involved
- Host an event/rally for savings
- Encourage government employees to participate and enroll
- Issue press releases and conduct interviews

***America Saves Week* activities for educational institutions**

- Distribute *America Saves Week* fliers and brochures to students and employees
- Display America Saves posters as provided by the Consumer Federation of America
- Send one or more stock emails regarding *America Saves Week* to students and employees
- Place *America Saves Week* article(s) in employees newsletter and school newspaper
- Enclose an America Saves flier as a payroll stuffer
- Place a notice of and information about *America Saves Week* on internal computer system
- Place a link to America Saves on school website and internal network
- Increase deferred compensation participation and contributions through one or more motivational workshops
- Provide access to no-fee savings accounts through America Saves enrollment, presentation(s), motivational workshop(s), and or topic seminar(s) i.e. EITC, homeownership, auto purchase
- Host an event featuring America Saves and 401(k)/deferred compensation plans

***America Saves Week* activities for public libraries**

- Distribute *America Saves* fliers and brochures to patrons and employees
- Display *America Saves* posters
- Set up display/area for reading/research and web access to saving, debt reduction and wealth building
- Host motivational workshops and topic seminars for patrons and employees
- Encourage saver enrollment at check out and information desks
- Hold contests/activities targeted to youth on saving and wealth building
- Send one or more stock emails regarding *America Saves Week* to employees
- Place *America Saves Week* article(s) in employees newsletter and patron news
- Enclose an *America Saves* flier as a payroll stuffer
- Place a notice of and information about *America Saves Week* on internal computer system
- Increase deferred compensation participation and contributions through one or more motivational workshops
- Provide access to no-fee savings accounts through *America Saves* enrollment, presentation(s), motivational workshop(s), and or topic seminar(s) i.e. EITC, homeownership, auto purchase
- Host an event featuring *America Saves* and 401(k) plans

America Saves Week “Get Acquainted Financial Bingo” Game

Prepared by: Barbara O’Neill

Directions:

Circulate with your fellow Kick-Off attendees. Introduce yourself and ask if the other person can provide a “yes” answer for any of the blocks on your bingo card. If he/she can, ask him/her to put their initials in the block and then quickly move on to the next person until you get BINGO!. You can only get one signature from each individual.

When you get a Bingo! (a complete row, a complete column, or a complete diagonal line), shout “Bingo!” Prizes will be awarded to the first participants who complete a “Bingo!”

B	I	N	G	O
Owns stock in at least one U.S. company Name of the company:_____	Lives in a household that prepares its own tax return (on paper or with a computer)	Remembers how he/she earned his/her first dollar! In what way? _____	Can define what a mutual fund is What is it?_____	Has a savings account in a bank or credit union. Name of financial institution _____
Family owns a car that is owned free and clear (no current car loan payments)	Has a 401(k), 403(b), or 457 plan or an IRA for personal retirement savings	Has a collection of some type, such as coins, stamps, art, antiques, collector cars, etc.	Has a college savings plan for their children	Knows what an IRA (individual retirement account) is What is it?_____
Pays credit cards in full each month to avoid interest charges	Has at least \$25 in cash with you currently	Knows what the Dow Jones Industrial Average (DJIA) is What is it?_____	Owns U.S. savings bonds (EE and/or I bonds) in his/her name	Saves or invests money on a regular basis (e.g., weekly or monthly) for future financial goals
Has a life insurance policy in his/her name	Has set specific written financial goals with a target date and a savings plan	Has accessed his/her credit report in the past six months to check for status and errors	Can define and give an example of inflation What is it?_____	Has money set aside in cash assets for emergencies, such as unemployment or car repairs
Spends money at least once a week on fast food	Can explain how compound interest works What is it?_____	Lives in a house that has a mortgage on it	Has automatic payroll deduction dedicated to saving	Has read a personal finance book within the last six months Title_____?

Sample *America Saves Week* Proclamation

Prepared by: George Barany, Consumer Federation of America
Please note that this text requires personalization is indicated by *italics*

**2007 AMERICA (*or community or organization name*) SAVES WEEK
BY (*TITLE OF OFFICIAL MAKING PROCLAMATION*)
A PROCLAMATION**

WHEREAS, personal and household savings is fundamental to America's (*or community or organization*) stability and vitality; and

WHEREAS, adequate emergency savings, retirement funds, and safe debt-income ratios are critical components of personal financial security; and

WHEREAS, America Saves is a national social marketing campaign to persuade, encourage, and motivate Americans to take financial action in building wealth through saving money and reducing debt;

WHEREAS, (*name of organization or community*) is a partner in the America Saves campaign and is committed to helping its (*members, citizens, clients, customers, and/or employees*) take immediate financial action to Build Wealth, Not Debt;

NOW, THEREFORE, (*I, Name, Title, or name of governing body*) do/does hereby proclaim the February 25 – March 4, 2007 as

AMERICA (*or community or organization name*) SAVES WEEK

AND DO DECLARE (*statement of America Saves Week related goal*)

I/WE HEREBY call upon all (*members, citizens, clients, customers, and/or employees*) to (*increase 401k contributions, start or increase an emergency fund, challenge employees or customers to save, or other goal related action*) or take another positive wealth-building action during AMERICA (*or community or organization name*) SAVES WEEK, and pledge to sustain that action during the following year.

IN WITNESS WHEREOF, *I/we* have hereunto set *my/our hand(s)* this (*date*) day of (*month*), 2006/07.

(*Signature/s*)

My *America Saves Week* Weekly Planner

Prepared by: Barbara O'Neill

Use this schedule to list the times and dates of the *America Saves Week* activities that you plan to attend.

	Sunday Feb. 25	Monday Feb. 26	Tuesday Feb. 27	Wednesday Feb. 28	Thursday Mar. 01	Friday Mar. 02	Saturday Mar. 03	Sunday Mar. 04
9 am								
10 am								
11 am								
Noon								
1 pm								
2 pm								
3 pm								
4 pm								
5 pm								
6 pm								
7 pm								
8 pm								
9 pm								

America Saves Week Workshop Facilitator Guidelines

Prepared by: Barbara O'Neill

Dear _____:

Thank you for agreeing to facilitate an *America Saves Week* presentation or presentations.

Several days before the session(s), please contact the presenter(s) to let them know your role and that you will be introducing them. Ask for a few points for their bio. Their names and contact info can be found on the *America Saves Week* schedule.

Duties at the *America Saves Week* kick-off

Pick up a facilitator's packet for each session that you are facilitating. The packet will include a door sign, evaluation and attendance forms, a "No Commercials" sign, *America Saves Week* program schedules, and give-away items.

10 duties at the day of the session

1. Arrive at presentation site at least 15 minutes prior to start time of presentation
2. Post the *America Saves Week* sign outside of presentation room (bring tape with you)
3. Bring *America Saves Week* handouts and give-away items for distribution at beginning of presentation
4. Bring "No Commercials" sign with you to hold up if same occurs
5. Bring evaluation forms for participants (hold onto all evaluations until debriefing meeting)
6. Meet and greet participants at the door. Wear your *America Saves Week* name tag and have each participant sign in on the sign in sheet
7. Welcome all and briefly explain the objectives of *America Saves Week*.
8. Introduce the presenter – get brief bio ahead of time – and remain for the presentation.
9. Collect participant evaluations and thank everyone for attending.
10. Complete facilitator evaluation; turn in at follow-up meeting (date to be announced)

America Saves Week Presenter Registration Form

Prepared by: Barbara O'Neill

America Saves Week in [location] is being organized to promote positive financial action such as saving, investing, and debt repayment. The Week will feature a variety of events hosted by local agencies and organizations. We would like to involve you.

Please complete this form if you would like to present a workshop during *America Saves Week*.

Presenter(s) Name(s): _____ E-mail: _____
E-mail: _____

Firm or Organization: _____

Mailing Address: _____

Contact Person: _____

Day Phone: _____ Cell Phone: _____ Fax: _____

Presentation Title: _____

Description of Presentation (Do not exceed 75 words):

Intended Audience:

- Children (8-12)
- Teenagers (13-17)
- Young Adults (18-24)
- Adults (25-60)
- Seniors (60+)
- Other, please describe: _____

Length of your presentation:

- ½ hour
- 1 hour
- 2 hours

Please allow time for questions and discussion.

Would you be willing to participate as a member of a panel?

- Yes
- No

Preferred time of presentation:
Indicate 1st, 2nd, 3rd choices and “not available” times

	Sun. Feb. 25	Mon. Feb. 26	Tues. Feb. 27	Wed. Feb. 28	Thurs. Mar. 01	Fri. Mar. 02	Sat. Mar. 03	Sun. Mar. 04
Morning (9 am – Noon)								
Afternoon (Noon – 6 pm)								
Evening (6 pm – 9 pm)								

Policies and Procedures

1. The *America Saves Week* Coordinating Committee will determine the workshop locations and presentations for all events open to the public; I agree to abide by their decision.
2. I understand that the *America Saves Week* Coordinating Committee cannot guarantee a minimum number of attendees at any particular workshop.
3. I understand that no fee can be charged to participants who attend *America Saves Week* workshops.
4. I understand that no marketing of products, services, or businesses is permitted during or immediately prior to or following an *America Saves Week* workshop.

Name _____ Title _____

Signature _____ Date _____

Questions/comments? _____

A member of the *America Saves Week* Coordinating Committee will contact you regarding workshop site and presentation selections, proposed schedules, and guidelines.

Please fax this form to the *America Saves Week* Coordinating Committee by [Deadline Date], to [Contact Person] at [Phone Number].

**THE DEADLINE FOR THE RECEIPT OF ALL WORKSHOP REGISTRATION
FORMS is [Date and Time].**

America Saves Week Class Sign-In Template

Prepared by: Barbara O'Neill

Name	Town	How did you hear about this event?			
		TV	Radio	Flyer	Newspaper

America Saves Week Evaluation Form

Provided by: Nancy Hudson, Ohio State University Extension

Note that this evaluation form is IRB approved by the OSU Office of Responsible Research Practices (IRB: 2005E0306)

Program Name: _____ Date: _____ ID# _____

Please circle the number that best describes your agreement with each statement.

These statements are about the program	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
a. I learned new information from this program.	1	2	3	4	5
b. I plan to use the information I learned in this program.	1	2	3	4	5
c. I am confident I can make changes recommended in this program.	1	2	3	4	5
d. I plan to make a change within 1 month. <i>What change?</i>	1	2	3	4	5
e. I plan to make a change within 6 months. <i>What change?</i>	1	2	3	4	5

These statements are about how you did things both before and after the program. There are no wrong answers.	Before participating in this program, I could say that I					After participating in this program, I now do / plan to				
	Circle one number for each statement Never Rarely Sometimes Usually Always					Circle one number for each statement Never Rarely Sometimes Usually Always				
f. Discuss money matters with co-spenders.	1	2	3	4	5	1	2	3	4	5
g. use specific goals to guide my financial decisions.	1	2	3	4	5	1	2	3	4	5
h. know my net worth.	1	2	3	4	5	1	2	3	4	5
i. set aside money for occasional expenses.	1	2	3	4	5	1	2	3	4	5
j. set aside money for unplanned expenses.	1	2	3	4	5	1	2	3	4	5
k. save money toward a goal.	1	2	3	4	5	1	2	3	4	5

l. Please write a comment about the program.

Over ►

These statements are about the instructor.	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1. Was well prepared.	1	2	3	4	5
2. Was interested in helping me.	1	2	3	4	5
3. Showed respect for all persons attending the program.	1	2	3	4	5
4. Stimulated me in wanting to learn.	1	2	3	4	5
5. Answered questions clearly.	1	2	3	4	5
6. Related program content to real-life situations.	1	2	3	4	5
7. Gave clear explanations.	1	2	3	4	5
8. Held my attention.	1	2	3	4	5
9. Presented information that will help me.	1	2	3	4	5

10. Please write a comment about the instructor.

These statements are about you and help us better understand our audience.
Completion is voluntary. Your responses remain CONFIDENTIAL and will be used only in summary form.
Please select the ONE best response for you for each numbered item.

11. I am: Male Female

12. My age is:

- under 20 20-29 30-39
 40-49 50-59 60 or over

13. My current marital status is:

(check only one)

- Never Married
 Married
 Living with Partner
 Separated/Divorced
 Widow/Widower

14. The highest level of school I finished is:

- Less Than High School
 High School Diploma or GED
 Some post High School education
 Technical/Trade School/ 2-Year College Degree
 4-Year College Degree
 Coursework Beyond College Degree

15. I am:

- White or Black or
 Caucasian African American
 Hispanic or Asian or
 Latino Pacific Islander
 Multi-racial Native American or
 Alaskan Native
 Other _____

16. My employment status is:

- Hourly Wage Worker Retired
 Salaried Worker Unemployed
 Commission/Tips Self Employed

17. I work an average of _____ hours a week.

18. What is your total before-tax annual income?

- Less Than \$10,000
 \$10,000-\$19,999
 \$20,000-\$29,999
 \$30,000-\$39,999
 \$40,000-\$49,999
 \$50,000 or More
 Prefer not to answer

19. How many people live in your household and share the income:

_____ Adults _____ Children

20. I heard about this program from:

(check all that apply)

- Flyer Newspaper
 Newsletter Radio
 TV Other: _____

Over ►

America Saves Campaign Coordinators As Of August 2006

Prepared by: George Barany, Consumer Federation of America

As of August 2006, more than 50 *America Saves* campaigns were in place across the United States. If there is a campaign operating in your locality, please contact the appropriate coordinator to work together on *America Saves Week* activities.

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