



MONEY SMART MONTH

KANSAS CITY • APRIL 2012

PARTNER TOOLKIT

This toolkit can be used as a reference guide for existing and potential partners of Money Smart Month. It includes guidelines, tips for hosting and marketing events, key campaign dates and other relevant information for partners.

For questions or more information about becoming a Money Smart Month partner, please contact Gigi Wolf at gigi.wolf@kc.frb.org or (816) 881-2736.

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PARTNER PROCEDURES AND GUIDELINES

We appreciate your interest in becoming a Money Smart Month partner! The goals of Money Smart Month are to increase awareness about financial education resources and to provide these to consumers of all ages. The Money Smart Month Steering Committee is looking for partners who would like to help promote these goals within their programming and demonstrate similar goals within their organizational strategies and practices.

Partner Options

- Work with a Steering Committee member to plan an event: If you can provide a presenter and/or a location, you might consider planning a financial education event during Money Smart Month. In order to help, a Money Smart Month Steering Committee member will walk you through the process and work with you to plan your event. Events can include, but are not limited to, a presentation, workshop or seminar on one or more personal finance topics. A list of potential topics, including budgeting, retirement/investments, credit and savings, can be found in the Tips section.
- Be a presenter: If you can teach or present financial education information, you might consider submitting a request to present during Money Smart Day or finding an organization to host an event during the month. Requests to present during Money Smart Day can be submitted through the 'Partners' section of the Money Smart Month website (www.moneysmartkc.org).

Partner Procedures

1. Confirm your intent to partner with a Money Smart Month Steering Committee member to plan, host or speak at a Money Smart event.
2. Determine the topic, location, date, time, description and target audience of your event.
3. Make sure that your event is registered on www.moneysmartkc.org by Feb. 9, 2012.
4. Requests will be reviewed to ensure that they meet overall campaign objectives, and if approved, partners will be notified within two business days.
5. Market your event or your role as a presenter/host to intended audiences. See the Tips section for marketing suggestions.
6. After your event, submit completed evaluation forms.

Partner Guidelines

When planning an event, the following guidelines should be observed:

- All events must be educational in nature and relate to improving knowledge and/or awareness of personal finances.
- Sales pitches, solicitations and/or commercial marketing are strictly prohibited.
- Most events 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.
- Partners should implement, as able, additional marketing and/or promotional strategies for their individual events to secure attendance numbers with a goal of at least 10 attendees per event.

CAMPAIGN TIMELINE

Key Date	Action
February 9	Confirm logistics for your event and register on the Money Smart Month website, providing all requested information for inclusion in campaign marketing materials.
March 31	Money Smart Day
April 24-25	Teach Children to Save
April 25	Deadline for completed evaluation submissions
April 27	Campaign closing luncheon

- ★ **Money Smart Day:** This event, sponsored by the Federal Reserve Bank of Kansas City, enables more than 25 partners to present financial education information to the general public on Saturday, March 31, 2012. Presenters on various financial education topics may submit a request to present through the 'Partners' section of the Money Smart Month website, www.moneysmartkc.org.
- ✚ **Teach Children to Save:** This program is coordinated annually through the Federal Reserve Bank of Kansas City and enables volunteers to share classroom-ready lessons with elementary students throughout the metro on April 24-25. The lessons are based on children's literature and focus on the importance of saving. Each student also receives a piggy bank and coloring book. Organizations may sponsor and provide volunteers for 10 classrooms at \$500 or 20 classrooms at \$1,000. Volunteers will receive all necessary materials and training in advance. For more information or to sign up, contact Gigi Wolf at gigi.wolf@kc.frb.org or 816-881-2736.
- ☀ **Money Smart Month Luncheon:** A special closing event is scheduled on Friday, April 27, 2012, at the Federal Reserve Bank of Kansas City. The event is an opportunity for campaign partners and sponsors to come together to celebrate successes from the campaign and recognize those who contributed. Distinguished speakers and local personalities will address the importance of financial education, and winners of the Money Smart Month student competitions will also be announced. All partners are encouraged to attend, but must register in advance. Invitations will be distributed in March 2012.

TIPS FOR PLANNING AND MARKETING EVENTS

Planning an Event in Six Easy Steps:

1. Select a topic (suggestions below).
2. Identify target audience(s) (i.e., seniors, women, unbanked, youth).
3. Secure a venue.
4. Select a presenter/speaker.
5. Register on the Money Smart Month website, www.moneysmartkc.org.
6. Promote using various forms of marketing (suggestions below) to ensure maximum attendance.

Partners should provide for the timely completion of all tasks leading up to and through Money Smart Month, including submission of completed evaluation forms for themselves and their participants. Remember to communicate information about your event early and often!

Event/Topic Ideas:

Find a Great Job and Increase Your Earnings
 Investment Strategies for the Future
 Surviving Divorce Financially
 Foreclosure Assistance
 Protect Yourself Against Fraud and Scams
 Debt Management Tips
 Developing a Spending Plan
 Retirement Planning
 Restoring Your Credit Score

How to Raise Financially Fit Kids
 Avoid Identity Theft
 Building Wealth
 Saving for Your Child's College Education
 Home Buying Strategies
 Solving the Mystery of Credit Reports
 Financial Planning for Small Businesses
 Seven Secrets to Living Within Your Means
 Surviving Job Loss
 Buying vs. Leasing an Auto

Marketing Materials

Online promotional materials for the campaign will be available to partners to help market their events. As materials for the 2012 campaign become available, they will be posted in a downloadable/print-ready format in the 'Marketing' section of the Money Smart Month website, www.moneysmartkc.org. Additional marketing for the campaign will be conducted through television, print, radio and other vehicles.

Marketing Suggestions

Partners are encouraged to use existing promotional strategies to yield event participation:

- Company website
- Company newsletters/publications
- Work with teachers to offer extra credit to their students for attending
- Mail lists and electronic list serves
- Offer door prizes and/or food

EVALUATION FORMS

To help measure the effectiveness, reach and success of the 2012 campaign, the Steering Committee encourages all partners and participants to complete evaluation forms. Partners should complete partner evaluation forms and ensure that participants at their events complete participant evaluations. Participants who complete evaluations will have a chance to win one of five major prizes including iPads and Kindles (no purchase necessary). Winners will be notified by May 10, 2012.

Customized evaluation forms will be distributed beforehand for each event. Completed evaluations should be submitted to your Steering Committee representative within three days after your event. Evaluation forms may also be submitted electronically to englishmi@umkc.edu or by fax to 816-235-2651. To arrange a different way to deliver these forms, please contact Mike English at 816-235-2654.