Library Partner Kit
2017

"Money Smart Week" is a registered service mark of the Federal Reserve Bank of Chicago.
Library Partner Kit 2016 | Table of Contents

Page 3 – 7
What is Money Smart Week and Money Smart Week @ your library?
These introductory documents provide a brief summary on the history and mission of the Federal Reserve Bank of Chicago’s Money Smart Week program, and the American Library Association’s (ALA) partnership initiative Money Smart Week. Also included are Fed & chairperson contacts as well as library partner guidelines.

Page 8 – 9
The Fed & Policies
Short outline on the function of the Fed as well fundraising policies partners, including libraries, must adhere to.

Page 10
Action Plan/Timeline
The table shares important dates and activities for your Money Smart Week library campaign. Dates may be subject to change, you will be notified of any timeline adjustments.

Page 11 - 13
Tools & Best Practices
These documents offer suggested best practices for success, online tools, instructions for accessing the database, reporting information and survey information.

Page 14 - 16
Marketing Materials
Instructions on how to download marketing materials online are available here. Materials include logos, posters/flyers, bookmarks, inserts and t-shirts. ALA will also be providing bookmarks and posters that can be purchased by libraries.

Page 17– 21
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.
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.
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.

Why Money Smart Week at Your Library?

Libraries have been instrumental in the success of Money Smart Week in designing, facilitating, and hosting quality events. The Money Smart Week partnership with American Library Association had an exceptional first year in 2011, with libraries in 30 states participating. In 2014, when asked “How valuable was this Money Smart Week Session?” 97.6% of consumers surveyed replied either “valuable” or “very valuable.” No wonder this partnership continues to grow! Libraries are excellent venues for Money Smart Week events. For decades, patrons have used libraries for unbiased business resources and financial information. From stock research to small business information, they have served job seekers, investors, entrepreneurs, business students and providing the most up-to-date reliable sources available for making informed financial decisions. Combined with the established tradition of supporting local economic development, libraries have earned a reputation as reliable and trustworthy places to go for financial information.

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 all 50 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. The Chicago Fed advises new campaigns and provides planning and promotional tools such as the website, logos, best practices, media kit templates and more. This Money Smart Week Library Partner Toolkit is geared toward library partners, and is an edited version of the general Money Smart Week Partner Toolkit.
How Can My Library Get Involved in Money Smart Week?

Please contact a Federal Reserve Bank or ALA representative listed below for more information about becoming a library partner for Money Smart Week. For more information about contacts within specific state coalitions, please refer to page 25 of this toolkit.

### All States

<table>
<thead>
<tr>
<th>Region</th>
<th>Organization</th>
<th>Contact Person</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Federal Reserve Bank of Chicago</td>
<td>Shala Murray</td>
<td>(312) 322-5251</td>
<td><a href="mailto:Shala.Murray@chi.frb.org">Shala.Murray@chi.frb.org</a></td>
</tr>
<tr>
<td>All Libraries</td>
<td>American Library Association</td>
<td>Michael Dowling</td>
<td>(800) 545-2433 ext. 3200</td>
<td><a href="mailto:mdowling@ala.org">mdowling@ala.org</a></td>
</tr>
</tbody>
</table>

What is a Money Smart Week Library Partner?

A Money Smart library partner is a library that actively participates during the Money Smart Week campaign with the approval of the Federal Reserve Bank. Organizations, including libraries, 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

Library 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 campaign. Other current partners include businesses, financial institutions, schools, not-for-profits, government agencies and the media.
Money Smart Week Library Partner Responsibilities

Money Smart Week library 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.
How do I sign up to be a Money Smart Week Library Partner?

Money Smart Week library partner registration is online. All partners are required to register online to become official partners for 2016 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.

To sign up online:
1. Go to: 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 2017 campaign must register. We will be using this electronic list for all communication from both the Federal Reserve and chairpersons for emails, etc.

Questions or comments can be directed to:

Shala Murray
Phone: (312) 322-5251
E-mail: Shala.Murray@chi.frb.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.
### Action Plan/Timeline

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anytime</td>
<td>Partner Sign Up</td>
<td>Money Smart Week library partner registration begins online. All partners</td>
</tr>
<tr>
<td></td>
<td></td>
<td>are required to register online to become official partners for 2016.</td>
</tr>
<tr>
<td>December-February</td>
<td>Program Planning</td>
<td>Program planning phase for Money Smart Week library partners.</td>
</tr>
<tr>
<td>Mid January-March</td>
<td>Database Entry</td>
<td>Money Smart Week library partners enter event information in the Money</td>
</tr>
<tr>
<td>April 22-April 29</td>
<td>Money Smart Week</td>
<td>Library programming takes place nationwide.</td>
</tr>
</tbody>
</table>
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
Phone: (312) 322-2353
E-mail: Mariann.Rapp@chi.frb.org

Here are the initial steps to access the database:

2. Hover over the partner tab.
3. Click “Registration” if you have not already created a profile, click “Log-In” if you have a profile.
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:
Shala Murray
Phone: (312) 322-5251
E-mail: Shala.Murray@chi.frb.org
Library Partner Discussion Forum

An online discussion forum is available specifically for library partners through the ALA Mailing List Service. Library partners can use the forum to exchange resources, ideas, questions, and comments for Money Smart Week.

Follow these simple steps to join the discussion list:

1. Go to http://lists.ala.org/sympa
2. First time users can click on “First login?” on the top right-hand side of the page and follow instructions to create an account. Existing users can log in with their account information.
3. From the homepage under “Mailing list categories”, search for “mswlibrary”.
4. Click on mswlibrary@ala.org / Money Smart Week @ your library.
5. This will take you into the mswlibrary discussion list homepage. Click on “Subscribe” on the left-hand side of the page.

Questions or comments about the ALA discussion list can be directed to:

Michael Dowling
Phone: 800-545-2433 ext 3200
E-mail: mdowling@ala.org

General Money Smart Week Discussion Forum

Additionally, there is also an online discussion tool is available for all MSW partners through the main Money Smart Week website. 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:


2. Hover your curser over the Partner tab on the main page.

3. Click on “Best Practices” from the drop down options.

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:

Shala Murray
Phone: (312) 322-5251
E-mail: Shala.Murray@chi.frb.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 15, 2015. 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: Shala.Murray@chi.frb.org

Questions or comments can be directed to:

Shala Murray
Phone: (312) 322-5251
E-mail: Shala.Murray@chi.frb.org
Online Marketing Materials

Library partners can download Money Smart Week promotional items at [www.moneysmartweekpartners.org](http://www.moneysmartweekpartners.org). Hover over the Partner Tab on the main page and click the “logos” drop down option to view and 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.

**Logos**

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

![Logos Example](image1.png)

**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.

![Poster Example](image2.png)
**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.
Suggested opening script for all adult MSW Events:

Welcome to [name of your event]. [Details about your event].

Description of class/activity: Note how it is one of thousands of free financial education events that are occurring all over the country amongst financial institutions, government agencies, non-profits, etc. in connection with Money Smart Week, created by the Federal Reserve Bank of Chicago.

Disclaimer: 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].

Survey: 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.

Sign-Up 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.
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 or visit us online at moneysmartweek.org to submit a comment.
Encuesta al Consumidor
Fecha del Evento:______________________________
Título del Evento:______________________________
Local del Evento:(cuidad):______________________________

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 electrónic (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?
   __ Sí  __ No

10. ¿En Cualés 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 o visite 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

☐ Submit consumer signup sheets to your MSW Chairperson or company MSW liaison.