Chair Kit
2018

**Check for the latest updates and revisions to the Chair Kit at http://www.MoneySmartWeek.org/.**

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

What is Money Smart Week?

Money Smart Week® is an annual 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 to:

- Stress the importance of financial literacy
- Inform consumers about where they can get help
- 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. Money Smart Week takes place in the spring, during the week designated by the Federal Reserve Bank of Chicago. The exact dates vary from year to year.

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 30 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 18 states.

Where Do Money Smart Week® Campaigns Take Place?

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. National partners also conduct Money Smart Week activities in many other parts of the country, where there is no organized local campaign.
Why Money Smart Week?
As part of the nation’s monetary policy making body, the Chicago Fed fully endorses financial education and believes in the idea that individuals and families can positively impact their well-being and the larger economy as a collective, when they make informed decisions about how they spend, save and invest their money. The Federal Reserve is at the core of the financial system with a multitude of financial and non-financial relationships and external partners.

Conducting a Money Smart Week Campaign

Overview

Money Smart Week campaigns take place in communities where organizations interested in financial education and wellbeing come together to plan and carry out free events during the week designated by the Federal Reserve Bank of Chicago. Organizations register as partners at www.MoneySmartWeek.org. Monthly planning meetings for the coming spring’s Money Smart Week normally begin in October. Campaigns are chaired or co-chaired by volunteers from partner organizations.

Money Smart Week activities can include but not limited to:

- A kick-off event to launch the week, garnering media attention, and getting the word out about the upcoming week of events.
- Face-to-face educational programs taught by MSW partner organizations. These can be open to the public or provided to a specific group, such as a membership organization, clientele of a social service agency, or employees at their workplace.
- Fairs or exhibits providing financial information.
- Webinars, conference calls, or social media events.
- Money Smart Week Kid essay contests

Under the leadership of the local MSW chair or co-chairs, the partners may organize into committees to carry out the planning and implementation of these activities and related tasks, such as publicity and marketing of the week’s events.
Chairperson Role & Responsibilities

Chairpersons are volunteer partners that serve as a liaison to the Federal Reserve Bank of Chicago and lead local planning teams. Planning teams often have co-chairs to divide responsibility and facilitate leadership transition over the years. The local planning team is free to develop term limits, nominations and voting procedures but is not required.

Below are the main objectives chairpersons seek to achieve:

- Serve as the primary point of contact for local partners with assistance from Chicago Fed staff when needed.
- Ensure partners submit attendance numbers, consumer surveys and photos/captions for reports. Dial in to monthly chairperson conference calls to receive updates and deadlines from the Chicago Fed and other chairs around the country.
- Communicate updates, deadlines and announcements to partners via email, planning meetings, etc.
- Coordinate and lead up to six planning meetings between Oct - March to keep campaign on track. Monthly chairperson calls will provide content and agenda items for meetings.
- Align individual partners or planning teams with official Money Smart Week National Champions.
- Help form and support committees and committee chairs as well as ensure they are meeting required objectives throughout the planning phase.
- Ensure partners have all the tools and resources required to plan/schedule events, add to the online calendar, promote events and report outcomes.
- Connecting partners to promotional resources available through the Money Smart Week website including logos and materials for download.
- Oversee any fundraising activity to ensure money is acquired according to Chicago Fed policies provided in your chairperson kit.
- Serve as media spokesperson and advocate to the community for the local effort as needed. Others in your planning group can also assist in this role.
- Help facilitate new strategic partnerships and grow the effort when/where possible.
- Uphold the mission and values of Money Smart Week including the requirement that no partner sell products or services, ensure a wide variety of programming is available to consumers, and encourage partnerships and collaboration among participating organizations.
Support provided to Regional MSW Campaigns by the Chicago Fed

The Chicago Fed provides support to regional campaigns and to the chairs in a variety of ways. Examples include:

- Webinars and instructional videos for chairpersons throughout the campaign, to discuss planning tasks and other coordinating efforts.
- Correspondence support from Chicago Fed staff and/or state MSW coordinators in states where coordinators have been provided.
- Promotional materials such as Money Smart Week branding and logos.
- Online calendar of events where partners enter all the details of their upcoming events which is searchable by the public.
What is a Money Smart Partner?

A Money Smart partner is an individual or organization that actively participates during Money Smart Week activities with the approval of the Federal Reserve Bank. Current partners include businesses, financial institutions, schools, libraries, not-for-profits, government agencies and the media. Organizations are considered partners upon registering at moneysmartweek.org and 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

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.

- Implement, as able, additional marketing and/or promotional strategies for 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 moneysmartweek.org before or on any local given deadlines.

- Complete and return measurement criteria including attendance numbers for all events, 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 Partner?

All interested partners are required to register online and after Fed approval will become official partners. If approved, you will receive notifications, news, and updates from the Chicago Fed and from your local planning team.

1. Go to www.moneysmartweek.org
2. Click “Join” at the top of the page
3. Follow given directions to complete registration
Committee Descriptions, Roles & Responsibilities

(Committees and descriptions vary by regional planning teams and need)

**College & University** — This group will reach out to colleges and universities to secure on-site programming for students. The committee will also develop a promotional strategy for reaching and encouraging students to participate in Money Smart Week 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 sponsor as needed.

**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 compiling results.

**Media** — This committee will leverage media relationships to secure publicity through local television, radio, online, and print outlets. Pitches will be made for coverage prior to and during the campaign. This committee will also be responsible for creating a speakers 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. See timeline for details.

**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.
Money Smart Kids

In many Money Smart Week campaigns, a committee of partners sponsor essay competitions for students to see if they are "Money Smart." A monetary prize to be used for college is usually awarded to the winner or finalists. MSW Partners may choose to contribute to the essay prizes, or solicit other sponsors. (See FRBC Policy on Soliciting Financial Support for Money Smart Week in the Appendix).

The Chicago Fed provides suggested essay questions for middle and high school MSW Kid Essay contests. The questions are posted on www.MoneySmartWeek.org, along with links to guidelines and application forms for each regional MSW Kid essay contest.

Regional campaigns should notify the Chicago Fed by Friday, December 1st if they want a customized, MSKid application packet (info page and application form) created for their regional contest. Application packets are posted under the Money Smart Kids tab on www.MoneySmartWeek.org.
Chair meeting dates for Money Smart Week 2018 are as follows, always at 1:00 PM CST. There will be two options offered for each call. The same information will be covered at each call.

**Conference Number:** 1-855-377-2663  
**Participant Code:** 53148602#

**Money Smart Week 2018 Campaign Chair Call Meeting Dates**

**Chair Call 1:** Wednesday, October 4th & Friday, October 6th

[https://join.onstreammedia.com/go/71972246/chaircall1session1](https://join.onstreammedia.com/go/71972246/chaircall1session1)  
[https://join.onstreammedia.com/go/71972246/chaircall1session2](https://join.onstreammedia.com/go/71972246/chaircall1session2)

**Chair Call 2:** Wednesday, November 8th & Thursday, November 9th

[https://join.onstreammedia.com/go/71972246/chaircall2session1](https://join.onstreammedia.com/go/71972246/chaircall2session1)  
[https://join.onstreammedia.com/go/71972246/chaircall2session2](https://join.onstreammedia.com/go/71972246/chaircall2session2)

**Chair Call 3:** Wednesday, December 6th & Thursday, December 7th

[https://join.onstreammedia.com/go/71972246/chaircall3session1](https://join.onstreammedia.com/go/71972246/chaircall3session1)  
[https://join.onstreammedia.com/go/71972246/chaircall3session2](https://join.onstreammedia.com/go/71972246/chaircall3session2)

**Chair Call 4:** Wednesday, January 24th & Thursday, January 25th

[https://join.onstreammedia.com/go/71972246/chaircall4session1](https://join.onstreammedia.com/go/71972246/chaircall4session1)  
[https://join.onstreammedia.com/go/71972246/chaircall4session2](https://join.onstreammedia.com/go/71972246/chaircall4session2)

**Chair Call 5:** Wednesday, February 14th & Thursday, February 15th

[https://join.onstreammedia.com/go/71972246/chaircall5session1](https://join.onstreammedia.com/go/71972246/chaircall5session1)  
[https://join.onstreammedia.com/go/71972246/chaircall5session2](https://join.onstreammedia.com/go/71972246/chaircall5session2)
Online Calendar

**Entering Events**

As a registered Money Smart Week Partner, Money Smart Week 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. All regions are encouraged to promote the online database to consumers who then can RSVP to classes directly on the database.

Should you encounter any errors or non-functioning features, please let us know right away. Your first contact for tech support should be moneysmart@chi.frb.org

Here are the initial steps to access the database:

1. Go to [www.moneysmartweek.org](http://www.moneysmartweek.org)
2. Hover over the Event button at the top of the page.
3. Select “Start an Event” from the drop down menu.
4. Login with your user name and password.

Before the planning meeting where you will discuss entering events into the calendar, ask each partner to try to enter one event. During your planning meeting, if possible, demonstrate entering an event. Remind partners to look at the FAQs tab at [www.moneysmartweek.org](http://www.moneysmartweek.org).

Questions or comments can be directed to: Money.smart@chi.frb.org

**Money Smart Week Evaluation**

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 25, 2018**.

**Consumer Survey**

Consumer surveys are electronically sent to consumers who RSVP’d on the website once the class is complete. For all other consumers, paper surveys will need to be printed out and completed on paper. As a partner, check that all participants in the class have registered directly on the website either before or after the event.
**Attendance**

Attendance numbers can be submitted through the MSW Partner Survey. You will receive an email after your event prompting you to complete the MSW Partner Survey and submit your event and attendance numbers via the survey.

**Highlights**

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: Money.smart@chi.frb.org

Questions or comments can be directed to: Money.smart@chi.frb.org
Media and PR

**Logos and Infographics**

Logos can be placed on a wide array of materials to promote Money Smart Week activities. The official MSW logos can be downloaded from [http://www.moneysmartweek.org/partners_resources#logos](http://www.moneysmartweek.org/partners_resources#logos).

These logos should be used **without** modification.

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**Marketing & Promotional Materials**

Money Smart Week national champion, the Consumer Financial Protection Bureau (CFPB) has agreed to print and ship the following Money Smart Week promotional materials to Money Smart Week partners at no cost. Partners are able to view and order all the Money Smart Week promotional materials via a MSW portal that will be shared with all partners once launched.

The CFPB also offers an array of free financial educational materials. Partners are encouraged to order any materials you or your event attendees may benefit from at [http://promotions.usa.gov/cfpblibraries.html](http://promotions.usa.gov/cfpblibraries.html).
Money Smart Week promotional files are also available for download at [http://www.moneysmartweek.org/newsroom#logos](http://www.moneysmartweek.org/newsroom#logos)

**Posters/Flyers**
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.

![Posters/Flyers](image)

**Bookmarks**
Bookmarks are normally distributed through local schools and libraries. Front and back of bookmark.

![Bookmarks](image)
**Statement Stuffer**

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. Front and back of statement stuffer.

**Postcard**

This is an ever green piece without MSW dates that can be used to promote the MSW website throughout the year directing consumers to year-long resources online as well as driving consumers to the website to sign up for events online during MSW.
Guidelines for Using MSW Logos and Text

There are guidelines for appropriate use of the Money Smart Week® logos and text. These are referred to as standards.

**Logo Standards**

1. The logo should always be printed in either color (PMS 343) or black and white. When posted on the web, the logo should always appear in color.
2. Graphics and designs should never be removed or altered from the approved logos.
3. Logos should always be situated right-side-up and never represented at a diagonal or other angle.
4. For web usage only, apply ALT Tag (Alternative Text) to allow accessibility to people with disabilities.
5. The logo size can be adjusted to accommodate any publication or print job, however the logo should never decrease in size so much that the text becomes unreadable. If higher resolution files are needed, contact the Federal Reserve Bank of Chicago Corporate Communication Division.
6. Decision to use the primary or secondary logo should depend upon the needs of the materials being designed.

**Text Standards**

The phrase "Money Smart Week," when it appears in text should always be:

- Three words
- Title case — M(oney), S(mart), and W(eek)
- Represented with an alphabetical "S" for Smart — not the dollar sign ($)
- Include the registration mark ® in superscript the first time it is used in a document
- Include the phrase "Money Smart Week is a registered service mark of the Federal Reserve Bank of Chicago" on all documents using the service mark notation. As this phrase is already contained within ChicagoFed.org's legal notices, it is not necessary to post this phrase on the Bank's Web site.
Tools and Best Practices

Events

Creative Events/Topics:
- Advanced Funeral Planning
- How to Find a Great Job and Increase Your Earnings
- Health Savings Through Exercise
- Savvy Shopping
- Surviving Divorce Financially
- Charitable Giving
- Couponing 101: Getting the Most for Your Money
- Protect Yourself Against Fraud & Scams
- Community Shred Day
- Free Financial Counseling for a Day

Ways to Increase Attendance

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, libraries or community centers have been the most successful venues.

Participation
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.

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

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.

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

Media & Promotion:
- Ben Franklin tour – community events, schools, MSW events, kick-off events, rotary clubs, etc.
- Newspaper partner to print and distribute calendars
- MSW promotional materials
- 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
Title Writing Tips

The way you title your events can really determine the size of your audience. It is important to make sure you use a title that is both attention grabbing and informative.

Tips:

1. Be specific. Give readers a clear idea of the class or activity content.

2. Use numbered steps/ideas to give readers a clearer idea of how the class will be taught
   Ex: “4 Things Everyone Must Know About Mortgages”, “3 Steps to Managing Credit Card Debt.”

3. Ask a question to peak interest.
   Ex: “You Just Graduated High School. Now, it’s time for College. Are You Ready?”

4. Use ‘power words’ and phrases to draw the reader’s attention and give them a clear idea of what the class will consist of. Discover, learn, how-to, explore and create are all examples of power words.

<table>
<thead>
<tr>
<th>Good titles...</th>
<th>Titles that can be more descriptive...</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The ABC’s of Homeownership</td>
<td>• Basic Money Management</td>
</tr>
<tr>
<td>• Smart Investing: Allocating your Investments and Rebalancing Your Portfolio</td>
<td>• Financial Fitness: Making the Choice</td>
</tr>
<tr>
<td>• How are We Ever Going to Pay for College?</td>
<td>• Take Charge of Your Money</td>
</tr>
<tr>
<td>• Making your Nest Egg Last a Lifetime</td>
<td>• Money 101</td>
</tr>
<tr>
<td></td>
<td>• Save for the Future</td>
</tr>
</tbody>
</table>
APPENDIX

Policies and Procedures

*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 throughout 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 where they can get help and provide free educational seminars and activities. 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.

Money Smart Week is a registered service mark of the Federal Reserve Bank of Chicago.
Suggested opening script for 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 occur 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.

Survey: Each of you will receive a short electronic 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 should you want to submit additional comments online.

Consumer Sign-Up: 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 sign up at moneysmartweek.org.
Example Planning Meeting Agenda

2018 Planning Meeting X
Thursday, December X
9 a.m.
[Insert location here]

AGENDA

9 – 9:10 a.m.
Individual Introductions and Go-around…………………………………………..….All

9:10 – 9:20 a.m.
Campaign Updates…………………………………………..…………….[Name of presenter]
(Kickoff, Deadlines, Discussion Forum, Resources Survey)

9:20 – 9:35 a.m.
Event Calendar Database/Website……………………..…….………………………..
[Name of presenter]

9:35 – 9:40 a.m.
Leadership Report……………………..…….……………………………….
[Name of presenter]

9:40 – 9:55 a.m.
Committee Reports/Announcements………………………..…………………Committee
Chairs/All

9:55 – 10:00 a.m.
Open Discussion and Partner Announcements……………………………………All

Contact Information

For regional chairperson contact information, please CLICK HERE