

Subject: AFDICA Money Smart - Money Smart - Next Steps (Updated January, 2021 for virtual presentations)

Greetings and thanks again for your interest in and volunteering for the AFDICA Money Smart (MS) program! Your efforts will not only be of great value to your community, but hopefully provide you with a rewarding experience. This document is to assist you after you have become familiar with Money Smart material with next steps you can take to begin training.

As previously indicated, the AFDICA financial education effort utilizes the FDIC Money Smart Program as the cornerstone of its curricula. Further our program is founded in grassroots activities, so that each member, or groups of members, seek out organizations within their communities for opportunities and needs to teach and improve financial literacy. This also allows members to seek out organizations to sponsor training events in forums, and for individuals, for the which the member might have the greatest interest.

For instance, in the past, AFDICA members have instructed Money Smart-Adults at correctional facilities, Money Smart-Young to preschoolers for at risk children at community centers, Money Smart for Adults at clothing centers, and Money Smart Older Adults at churches. While all these events originated by member outreach, they each reflected the interest of the member.

So how do I start?

1. Figure out which age group(s) interest you the most. Keep in mind that only Money Smart for Older Adults has a participant guide in both English and Spanish that are available to order through the CFPB's website or the US Government Printing office for free including shipping. Here is the link to order copies <https://pueblo.gpo.gov/CFBPubs/CFBPubs.php?PubID=13039> and our current expectation is that all students in a MSOA training session would receive a Student Guide to keep. For the other courses, the instructor and participant guides as well as the power point slides are available through <https://www.fdic.gov/consumers/consumer/moneysmart/index.html>
2. Ask yourself what venues are most likely for your target audience; Training prospects may include schools (including charter schools), community centers, senior centers, churches, banks (only those banks which are currently members of the FDIC Alliance should be contacted), virtually anywhere you think a need exists.
3. Once you have figured out your target audience, reach out to your local organizations. You will also find in the Education web page our own "AFDICA Money Smart Solicitation Guide" which can be used for either talking points or as introduction made via mail or email.
4. It often takes many contacts to yield a forum so be patient.
5. Once you have found your organization, meet (virtually) with its director to determine exactly what areas might interest the participants. Keep in mind that each of the curricula is comprehensive and it would take about 14 – 20 hours to complete the full agenda. It is doubtful organizations can offer that much time so it's important to tailor the training to the needs and wants of the community.

This is also the chance to discuss with the director what virtual platform they prefer to utilize. If zoom, AFDICA has an account that you can use. Contact Scott Taylor or Mindy West for specifics. If it is another platform, ask if you can try it out prior to the presentation.

6. Participate in one of FDIC's Train the Trainer sessions: Gaining a confidence level to effectively train others is a learned process itself. You will likely find helpful the FDIC training videos which cover the various Money Smart Programs, check it out here, <https://www.fdic.gov/consumers/consumer/moneysmart/trainthetrainer.html>

Other helpful resources include this guide on how teachers succeed <https://tinyurl.com/h3a8mwp> and other videos about effective training and tips along with effective presentations: <https://tinyurl.com/z8b4vud> and <https://tinyurl.com/yaucz7d5>

7. Evaluation forms: The MS Adults includes evaluation forms at the end of each of the fourteen modules and MS Older Adults at the end of the course. As the videos suggest, reflecting on the effectiveness of your presentation not only allows you to improve it, but also to learn what content may need change (and the FDIC welcomes such feedback). You should actively engage participants to complete the evaluation forms, and so that we may best monitor this program, and better individual as well group performance, we will request that you share your evaluation forms at the conclusion of a session, at moneysmart@afdica.com.

Miscellaneous:

We have received the opinion that is not legally appropriate for us to solicit donations to our organization. On the other hand, if students, parents, organizations or partners volunteer monetary contributions to our cause, they should be directed to www.afdica.com where donations are easily facilitated.

There is also an AFDICA disclaimer similar to the one the FDIC uses which can be found on the Education web page. It basically states the AFDICA is not responsible for the content of the material.

If you have questions please do ask! Our discussion board (list serve) exist so that we may share experiences and better our collective experience and delivery of Money Smart programs, or send an email to moneysmart@afdica.com.

The AFDICA --- and YOU --- will make a difference in your community by participating in this program.

THANK YOU!