

Subject: AFDICA Money Smart - Money Smart - Next Steps  
**(Updated September, 2022 for virtual presentations)**

Greetings and thanks again for your interest in volunteering to present topics from 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 with steps you can take to begin training people after you have become familiar generally with the Money Smart material.

As previously indicated, the AFDICA financial education effort utilizes the FDIC Money Smart Program as the cornerstone of its curricula. Our program is founded in grassroots activities that each member, or groups of members, become aware of within their communities for opportunities to teach and improve financial literacy. Examples of organizations that might benefit from financial literacy training are childcare facilities (there is a Money Smart module designed for children in pre-kindergarten), book groups, social organizations, communal living facilities such as retirement communities, and neighborhood groups. Members can offer to conduct training events in forums, and for individuals, for which the member might have the greatest interest and that is accessible to the member.

Some examples of successful training sessions that AFDICA members have conducted include 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. Each of these events originated through member outreach to organizations or facilities that reflected the interest of the member.

In addition to these sessions that originated from member outreach there have been training sessions conducted in response to inquiries to AFDICA by organizations throughout the country for education on financial literacy. A recent example is the training completed by a team of AFDICA members for the South Fulton Arrow Youth Council in Atlanta, conducted once a month over a period of time. You can find videos of some of the sessions conducted for that training here

<https://vimeo.com/showcase/9276577>

**So how do I start?**

Figure out which group(s) interest you the most. There are several modules that have English and Spanish versions, and the site is regularly updated as new versions of materials become available. Here is the link to order copies of the Money Smart for Older Adults in both English and Spanish <https://pueblo.gpo.gov/CFPBPubs/CFPBPubs.php?PubID=13039> . 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>

1. Ask yourself what venues are most likely for your target audience and think about which venues are of most interest to you. As noted above, 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.
2. 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 an introduction made via mail or email.
3. It often takes many contacts to yield a forum so be patient.
4. Once you have found your organization, meet (virtually or in person) 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.

5. Reach out to us for any help you may need or to identify people who may be willing to work with you on your training. Also be sure to look at the videos we have posted of training sessions other AFDICA members have completed.

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>

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](mailto: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 <http://www.afdica.com> where donations are easily facilitated.

There is also an AFDICA disclaimer like 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](mailto:moneysmart@afdica.com).

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

THANK YOU!