

MONEY
SMART 
COLORADO
APRIL 21-28, 2012

Partner Kit



Table of Contents

Page 3

What is Money Smart Colorado and How do I Become Involved?

These introductory pages provide a brief summary on the history and mission of Money Smart Colorado as well as contacts for involvement. Additionally, these pages outline how organizations can participate and the guidelines they must follow.

Page 6

Timeline

This table charts important dates and activities for Money Smart Colorado.

Page 7

Best Practices and Ideas for Partner Events

This section highlights some of the most creative and innovative ideas and/or techniques implemented in campaigns throughout other areas that have participated in similar awareness Colorado campaigns.

Page 9

Marketing Materials

This is information regarding marketing materials and instructions on how to download online materials. Materials include logos, posters/flyers, and bookmarks/inserts. A limited quantity of inserts will be provided to each Money Smart Colorado partner at no cost.

Page 10

Committee Description, Roles & Responsibilities

This page offers a glance at the committees and their functions. Other committees can be formed if deemed necessary by the participating partners. Responsibilities may also be added, subtracted, or combined depending on the local needs and/or resources.

Page 11

Colorado Jump\$tart

This page offers an overview of the Colorado Jump\$tart Coalition.



Money Smart Colorado - April 21-28, 2012

What is Money Smart Colorado?

Money Smart Colorado is a week-long Colorado public awareness campaign designed to help everyone – young and old - better manage their personal finances. This is achieved through the collaboration and coordinated effort of organizations across the state 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 state (the goal is to provide free to low cost events). 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.

All those interested in the cause of financial literacy are welcome to become a “partner” in Money Smart Colorado. Those involved with Money Smart Colorado typically do 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 Colorado

When is Colorado Money Smart Colorado?

Money Smart Colorado is April 21 - 28, 2012.

How Did It All Get Started?

The idea of this week originated in Chicago and has also been undertaken in the Denver area in 2009. The Money Smart Colorado effort is coordinated by Colorado Jump\$tart, a diverse group of more than 35 Colorado organizations working together to promote personal financial literacy. The group was formed to help organizations interested in financial education share resources, network, and increase awareness of the importance of financial literacy in Colorado. The goal is to help all Coloradans to become better educated on how to successfully manage their personal finances.

How Can My Organization Get Involved and Become a Partner in Money Smart Colorado?

Participating in Money Smart Colorado is not difficult or time consuming. It is an opportunity for your organization to make an impact within your community and educate consumers about the importance of financial education. Partner with a community organization to host or hold a Money Smart event at your location or work with a local school to teach children the meaning of saving. Take advantage of the Money Smart Colorado’s free resources to help teach the public about money, banking and personal finance. You have the opportunity to reach out to the community and give children and adults the tools and inspiration for a successful financial future.

A Money Smart Colorado partner is an organization that actively participates during the week with the approval of Colorado Jump\$tart. Organizations 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 Colorado

Partners are expected to provide leadership, communicate internally and externally, possess or acquire general financial literacy knowledge, promote their own event/Money Smart Colorado and be committed to the Money Smart Colorado program. Current partners include businesses, financial institutions, schools, libraries, not-for-profits, government agencies and the media.

Benefits as a partners include being able to post their events for free to an online database of events, and have information published in a printed calendar of events. In addition, partners receive access to free marketing materials and resources to help promote their events; marketing workshop; partner networking event; and the wrap-up luncheon.

Money Smart Colorado Partner Responsibilities

Money Smart Colorado 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 your own Money Smart Colorado activities.
- Provide vision, leadership and general direction to third-party sponsors/presenters.
- **Submit Money Smart Colorado event information via the on-line database before or on the given deadline (See timeline on Page 6).**
- **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.**

What are the Next Steps?

1. **Learn More.**
 - Go to www.MoneySmartColorado.org to learn more.
2. **Plan.**
 - Begin to plan an event to occur during Money Smart Colorado – the week is April 21 – 28, 2012
 - Identify your target audience (i.e. seniors, women, unbanked, youth). Consider audiences your organization may already have a relationship with.
 - Select a topic, secure a venue and select a presenter/speaker.
 - Remember: 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 may be included for appropriate audiences such as students, employees and professional groups.

3. Add Your Events.

- Submit your Money Smart Colorado event information by clicking on “Add an Event” at www.MoneySmartColorado.org.

4. Market and Promote.

- Get the word out about your event to get the attendance you want. Use some of the free resources online at www.MoneySmartColorado.org as promotional tools. Think about traditional and social media, websites, flyers, email blasts, news releases, etc.
- Work with your local media outlets to help spread the word about your event and Money Smart Colorado.

5. Have Your Event.

- Conduct your event for your target audiences. Have fun, and remember that financial literacy is essential for all ages.

6. Evaluate.

- We need your help to measure the success of Money Smart Colorado. Complete and return the information we'll request - attendance numbers, surveys, photos, media clips and samples of promotional materials.

Questions

For more information contact Stacey Montague at stacey.montague@kc.frb.org or 303-572-2385 or CJ Juleff at cjuleff@comcast.net or 303-910-5293.



Money Smart Colorado Timeline

Date	Activity	Action
Dec 12	Website	www.MoneySmartColorado.org will be available to start gathering information, logos/marketing materials, and guidelines. Once you are a partner, you can register, submit and edit events.
Jan 12	Partner Networking Event	Free meet-up and mixer to network with other partners, share ideas and collaborate on ways to make your Money Smart Colorado events/workshops successful.
Feb 6	Marketing materials	DEADLINE for event information; information must be submitted through www.MoneySmartColorado.org for inclusion in the printed marketing piece. Marketing pieces request must also be submitted at this time.
Feb 9	Marketing Seminar	Free workshop to how to use public relations, marketing and social media to take your business to a new level and increase attendance at your Money Smart Colorado events.
Feb 27	Marketing Materials	Marketing pieces will be distributed to partners via mail.
April 16	Survey Packets	Partner and participant survey packets will be distributed to partners via email.
April 20	RSVPs Due	DEADLINE for RSVPs for Wrap-up Luncheon.
April 27	Wrap-up Luncheon	Luncheon event for Money Smart Colorado 2012.
May 4	Measurement Materials	DEADLINE for all survey packets, photos and additional feedback/reports.
May 17	Results Meeting	Meeting to discuss results and celebrate success at the Colorado Jump\$tart May 2012 meeting.



Best Practices and Ideas for Partner Events

Suggested Steps When Holding an Event

- Identify target audience(s) (i.e. seniors, women, unbanked, youth).
- Select a topic and secure a venue.
- Select a presenter/speaker who will engage and inform your audience.
- Register your event on www.MoneySmartColorado.org by **February 6**.
- Promote event using various forms: media (radio, TV, print), websites, signage, mailings, etc. to ensure maximum attendance.
- When possible, gather digital photos, media clips (print and television), and radio broadcast information.
- After your event, submit measurement results.

Examples of Creative Events/Topics:

- Advanced Funeral Planning
- How to Find a Great Job and Increase Your Earnings
- Health Savings Through Exercise
- Supermarket Smarts
- Surviving Divorce Financially
- Charitable Giving
- Gambling: Deal or No Deal
- How to Find the Best Deal on Your Apartment
- Buying or Leasing – What’s the Best Auto Deal for You
- Protect Yourself Against Fraud & Scams
- Community Shred Day
- Estate Planning
- Free Financial Counseling
- Cash, Cars & Credit – Real Life Lessons for Youth
- Financial Literacy Books -Displays at local libraries

Activity Hubs: Using 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 or community centers have been the most successful venues.

Ways to Generate Participation

Any combination of these ideas is a great way to be involved in Money Smart Colorado. Consider promoting Money Smart Colorado even if you are not hosting an event to help spread the word about the week and personal finance. Remember to register at www.MoneySmartColorado.org to be recognized for your involvement.

- Put announcements in your newsletter.
- Display Money Smart Colorado promotional materials (logo, flyers, etc.) for customers and employees.
- Operation green light (lighting businesses in town in green lights at night).
- Invite local media to hear Money Smart Colorado message and cover events.
- Place the link www.MoneySmartcolorado.org on your homepage.
- Send an email blast to your contacts.



- Use social media including Facebook, Twitter, etc. to create interest in your program.
- “Like” the Colorado Jump\$art Facebook group and share your comments on your Money Smart events.
- Make table tents in your cafeteria.
- Create a contest to promote financial literacy and Money Smart Colorado (i.e. coloring contest for children).
- Partner with another organization that could plan a financial literacy event to host in your facility.
- Have children create Money Smart Colorado art with sidewalk chalk outside your building.
- Encourage everyone to wear green for a day during Money Smart Colorado.

Extra Credit: Work with teachers and professors to give extra credit for attending classes and submitting a report.

Money, Gifts & Food: Provide door prizes; food and refreshments; registration to win cash or savings bonds when consumers attend your class.

Work with Not-for-Profit Agencies: Invite local agencies and their clientele to attend your Money Smart Colorado event.

Partner with a Workplace: Contact local Human Resources manager to see if you could host a workshop for the company’s employees.



Marketing Materials

Partners will be given printed marketing pieces and bookmark/insert cards; plus have the opportunity to attend a marketing workshop. Partners will have to send a printed materials quantity request by **February 06, 2012** to Stacey Montague, stacey.montague@kc.frb.org or 303-572-2385.

Partners can also download Money Smart Colorado promotional items at www.MoneySmartColorado.org. The items are located on the Partners page. 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 Erin O'Donnell, erin.odonnell@kc.frb.org or 303-572-2394.

Partner Marketing Workshop

This is a workshop to help partners learn how to market themselves and their Money Smart Colorado event.

Logos

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



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). These can be viewed and downloaded from the Partners Resources page on www.MoneySmartColorado.org.

Bookmarks, Insert or Direct Mail Card

These will be distributed to each partner along with the calendar of events. The cards are also available to be viewed and downloaded from the Partners Resources page on www.MoneySmartColorado.org.

This can be used several ways such as a bookmark, insert or direct mail card to help promote Money Smart Colorado and your event. Partners can also add personalized event information on the back.





Committee Descriptions, Roles & Responsibilities

Media and Promotion Committee

Kathryn Powell, Financial Education Program Manager for CollegeInvest, and Erin O'Donnell, Public Affairs for the Federal Reserve Bank of Kansas City – Denver Branch, are leading this group. For more information contact: Kathryn Powell at kpowell@collegeinvest.org or 303-376-8829; or Erin O'Donnell at erin.odonnell@kc.frb.org or 303-572-2394. 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 booklets, flyers, posters, bookmarks or any other collateral materials that are created to promote the website/calendar of events. 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. The committee will also work to secure publicity through local television, radio 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.

Partnership and Outreach Committee

CJ Juleff, Colorado Jump\$tart Executive Director and Stacey Montague, Director of Public Affairs for the Federal Reserve Bank of Kansas City – Denver Branch, are leading this group. For more information contact: CJ Juleff at cjuleff@comcast.net or 303-910-5293; or Stacey Montague at stacey.montague@kc.frb.org or 303-572-2385. This committee works to help recruit new organizations to sponsor events for Money Smart Colorado by reaching out to businesses and other organizations throughout the state of Colorado.

Wrap-up Event Committee

Stacey Montague, Director of Public Affairs for the Federal Reserve Bank of Kansas City – Denver Branch, is leading this group. For more information contact: Stacey Montague at stacey.montague@kc.frb.org or 303-572-2385. This committee will execute the planning for the wrap-up event to be held on April 27, 2012. This committee will recommend and secure a venue, speakers, invitee list, agenda and room set-up.

Measurement Committee

Kathy Smith, Communication & Training Development Specialist for Pinnacle Financial Strategies is leading this group. For more information contact: Kathy Smith at kathy.smith@pinnstrat.com or 303-751-8468. 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 compile results.



Colorado Jump\$tart

The Colorado Jump\$tart Coalition is a nonprofit organization with more than 35 organizations and individuals representing business, government and education throughout the state of Colorado. We have joined together to improve the personal financial literacy of Colorado youth by:

- Raising awareness of personal financial literacy.
- Enhancing professional development of Colorado educators on financial literacy issues.
- Coordinating and promoting communication and cooperation among coalition members.
- Supporting personal financial education legislation.

The Jump\$tart Coalition is a proud affiliate of the National Jump\$tart Coalition for Personal Financial Literacy. The National Jump\$tart Coalition, based in Washington, D.C., was first convened in 1995 and consists of over 200 organizations committed to improving the financial literacy of America's youth. For more information, visit their website at www.jumpstart.org.

For more information about Colorado Jump\$tart, visit our site at www.cojumpstart.org.