Partner Packet

Money Smart Week DeKalb

Serving DeKalb, LaSalle, and Lee Counties
Table of Contents

What is Money Smart Week 3
How Did It All Get Started? 3
What is a Money Smart Partner? 3
Partner Responsibilities 4
Signing Up to be Part of Money Smart Week 2016 5
  Sign Up With Money Smart Week 5
  Sign Up with Money Smart Week DeKalb 7
Marketing You Event 8
  Provided Marketing 8
  Additional Marketing Opportunities 8
Title/Description Writing Tips 8
Committee Descriptions, Roles & Responsibilities 9
Important Dates and Deadlines 10
Important Contact Information 11
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.

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.

What is a Money Smart Partner?

A Money Smart partner is an individual or organization that actively participates during Money Smart Week with the approval of the Federal Reserve Bank. Current partners include businesses, financial institutions, schools, libraries, not-for-profits, government agencies and the media. Individuals and 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 Week
Partner Responsibilities

- 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. See the “How to help market my event” section in this guide for additional ideas.

- Appoint a representative to manage Money Smart Week activities and to allow for attendance) at planning meetings (or call in to the conference bridge) 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. A list of meetings for Money Smart Week DeKalb is in the “Important Dates” section of this guide.

- 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 the given deadline.

- 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.

- Check out partner videos/webinars at www.moneysmartweekpartners.org/recorded_webinars

- Be mindful of important dates and deadlines. See the “Important Dates” section of this guide.

- 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 to Randi Napientek or Jackie DeNalte.

- Understand that Money Smart Week DeKalb Coordinators will:
  - Include your events in the Daily Chronicle Insert (if submitted before the deadline)
  - Listing in the Local Money Smart Week Website: [www.moneysmartweek.niu.edu](http://www.moneysmartweek.niu.edu)
  - If requested, we will enter your listing in the national site: [www.moneysmartweek.org](http://www.moneysmartweek.org)
  - If requested, a personalized flyer to help you market your event
  - Assessments for your session. We will distribute these at the Kick-Off Celebration in April. For your convenience, we will also submit the assessments to the National Money Smart Week Organizers for you.
Signing Up to be Part of Money Smart Week 2016

There are two ways to sign up to be part of Money Smart Week 2016. The first is to sign up directly with the national Money Smart Week website. The second is to contact Money Smart Week DeKalb directly.

Sign Up With Money Smart Week

Starting this year, we would like all partners to enter their own information into the national database. This will allow you to be contacted directly from individuals who are interested in your event. If you would still like Randi to enter your information, that is ok too, please just let her know.

** Please note that if you enter in your own information, it is your responsibility to enter in attendance numbers for the event. You will receive multiple emails from the system until you do so.

To enter your information into the National database, you will need to do the following:

1. Go to [www.moneysmartweekpartners.org](http://www.moneysmartweekpartners.org)
2. Register or Log in to be given access to communication from the Fed as well as resources to assist you in your Money Smart Week initiatives.

3. Click on Create an Event

4. Enter your event information
   a. **Type:** Enter the type of event you are hosting
      i. *Public Standard:* Anyone is open to come. This is the most popular event.
      ii. *Public Online:* This is an online workshop only
      iii. *Private:* The event that is closed to the public. Many workplace initiatives, schools, and other private groups will fall into this category.

   **Once you select your option, the rest of the form populate.**
b. **Title and Description:** Be mindful that there is a character limit to these boxes. *(Title - 75, Description - 150)*

c. **Topic:** Pick the one that best applies. This is how people will find your event if they search by topic. Only one selection is allowed.

d. **Audience:** People can also select by audience type. You can select all that apply.

e. **American Library Association:** If you are a member, make sure to select Yes, if not, leave no checked.

f. **County:** select the county that the event will be taking place

g. **Venue:** Provide the name of the venue that will be hosting the event.

h. **Location:** Provide the address. This needs to be a valid street address. The system generates a map.

i. **Date:** Provide the date and time (be mindful of am vs. pm)
   i. If your event is going to be repeated on a different day, there is an option to add a session. This will add an additional date box for you to enter information.

j. **Disability Access:** Is the event accessible to those with disabilities?

k. **Public Transportation:** Unfortunately in DeKalb, Lee, and LaSalle this is not an option listed. Just leave this blank.
l. **Primary Contact:** This is so people who have questions on the event have someone to contact. Enter the information you would like them to contact. You do have the option to enter a separate email contact instead of the primary contact.

m. **Contributing Partners:** If you are partnering with any groups, list those organizations here. Do you have someone that contributed to the event? You have the option to add more than one contributing partner.

n. **RSVP Required:** Are you requiring participants to RSVP for head counts? Food? You can indicate that here along with the date to respond by and contact information if it is different than above

o. **Additional Information:** Here you might want to add any information that you were not able to enter into your description or other important notes that participants should know.

p. **Click Review for Submission:** Make sure that your information is correct.

q. **Click Submit for Approval**

**Sign Up with Money Smart Week DeKalb**

We will be pulling information from the national Money Smart Week site for the Daily Chronicle as well as to populate our local website. We will make sure all listings match. Please know that we are still here to help you if you would like us to enter your information into the national database for you. Please let Randi Napientek ([randi@niu.edu](mailto:randi@niu.edu)) or Jackie ([Jackie@kishunitedway.com](mailto:Jackie@kishunitedway.com)) know the following:

- Date
- Time
- Location
- Contact Information
- Brief Description

For examples of these, please feel free to look at past year’s information at [www.moneysmartweek.niu.edu](http://www.moneysmartweek.niu.edu)
Marketing You Event

Although being a Money Smart Week partner provides you with multiple marketing outlets, there are more opportunities to let the community know of your sessions.

Provided Marketing:

- Listed in the national online listing of Money Smart Week events (www.moneysmartweek.org)
- Listed in the local online listing of Money Smart Week events (www.moneysmartweek.niu.edu)
- Listed in the Daily Chronicle insert of events that will be distributed in the Daily Chronicle on April 15th
- A customized flier of your event

Additional Marketing Opportunities:

- Purchase an Advertisement in the Daily Chronicle to highlight your event(s)
- Hang your flier in your business
- Email blast your contacts to inform them of the event
- Saturate social media outlets (Twitter, Facebook, LinkedIn, etc.)
- Word of mouth: network with other organizations, family friends and neighbors as well as co-workers to let them know of your session(s)

Money Smart Week Webinars

The Federal Reserve Bank of Chicago host different webinars over the year to help partners with their events. Please visit www.moneysmartweekpartners.org/recorded_webinars to watch recorded sessions.

Title/Description 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 good title that is both attention grabbing and informative. Please refer to these tips before titling and submitting your events!

Tips:

- Be specific. The print calendars will be cutting back on much detail beyond the title, so readers will be very dependent on the title to give them a clear idea of the content of the class.
- 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.”
- Ask a question to peak interest. Ex: “You Just Graduate High School. Now, it’s time for College. Are You Ready?”
- 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
Committee Descriptions, Roles & Responsibilities

**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.

**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.

**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.

**Library Engagement** – This committee will reach out to libraries in the area about events that can be held at their locations as well as the Big Read events. The committee will also develop a promotional strategy for reaching and encouraging community members to participate in Money Smart Week activities at their libraries.

**Media/Marketing** – 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 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.

**Sponsorship** – This committee will work to establish sponsorship opportunities for Money Smart Week organizations. This funding will be used to off-set costs in advertising, printing, venue rentals, and more. This committee will also work to identify potential donors as well as work with them to help support Money Smart Week.

**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.

**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.
Important Dates and Deadlines

December 3  Money Smart Week Partner Information Session

December 18  Details to the Fed about Money Smart Kid Contest Participation

January 12  *Monthly Partner Meeting 8:30-10:00am
(First National Bank Administration Building Board Room - 121 W. Lincoln Highway, DeKalb)

February 2  *Monthly Partner Meeting 8:30-10:00am
(First National Bank Administration Building Board Room - 121 W. Lincoln Highway, DeKalb)

March 1  *Monthly Partner Meeting 8:30-10:00am
(First National Bank Administration Building Board Room - 121 W. Lincoln Highway, DeKalb)

Registration for Colleges and Universities to sign up to participate in GeoCache

March 15  Last Day to submit your event on moneysmartweek.org or to let Randi or Jackie know if you would like to have an event to have it included in the Daily Chronicle insert.
(Please note you can still enter information to moneysmartweek.org or let Randi and Jackie know of events to enter on our local website, but your event will not be in the Daily Chronicle insert after this date due to design and printing deadlines)

April 1  Advertiser deadline for Daily Chronicle Ad Space

April 5  *Monthly Partner Meeting 8:30-10:00am
(First National Bank Administration Building Board Room - 121 W. Lincoln Highway, DeKalb)

April 20  Money Smart Week Chronicle Insert Distributed
Money Smart Week Guest DJs on B95 at 8:00am

April 22  Money Smart Week Kick-Off Celebration

April 23-30  Money Smart Week Events

May 7  Money Smart Week Assessments Due. Please see instructions on the packet.

*If you cannot make it, but would like to call in, Glenn Hollister and IDEAL INDUSTRIES, INC. has generously provided a conference bridge for our use.

Call-in number:  877-287-8135
Meeting Number:  *7319924*  (You must enter the * before and after the number as shown above).
Important Contact Information

Chairs of Money Smart Week DeKalb
(Programing, Sponsorship, General Questions, etc.)

Dawn Littlefield
Executive Director
Kishwaukee United Way
815-756-7522
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Randi Napientek
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Jackie DiNatale
Coordinator of Outreach and Finance
Kishwaukee United Way
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Daily Chronicle Representative
(Advertising, Marketing, Promotions, etc.)

Dustin Davis
Multimedia Account Executive
Shaw Media
815-756-4841 x2263
dudavis@shawmedia.com

Chair of Library Engagement Committee
(Questions about library programming, etc.)

Samantha Hathaway
Communications Assistant
DeKalb Public Library
815-756-9568 x 265
SamanthaH@dkpl.org

Chair of Money Smart Kids Steering Committee
(Questions about Kid's Programming, etc.)

Beth Metzler
VP for Programs and Partnerships
Econ Illinois
815-753-6930
bmetzler@niu.edu

Chair of Workplace Initiatives Committee
(Questions about private events in the workplace)

Glenn Hollister
Retired - IDEAL INDUSTRIES, INC.
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