

Presentation Planning Checklist

- Register on www.abaef.com and download Teach Children to Save Tools.
- Set goals and determine how you will measure success (e.g., reach all 3rd and 4th grade students at local area schools, integrate personal finance into existing afterschool programs reaching low-income individuals, attract new customers, strengthen existing relationships).
- Determine a budget to meet anticipated expenses and how many employees will be involved in your bank's efforts.
- Select the age group you wish to reach with your message.
- Identify a school or community organization with whom to partner.
- Contact the school's principal and participating classroom teacher to establish a working relationship, if one is not already in place.
 - Consult educators at the beginning of the school year, toward the end of a grading term, or at the end of the current year in preparation for the year ahead.
 - Collaboration is key. Consult with teacher on dates/topics before setting details in stone. Discuss room setup where presentation will take place. Record information collected on the **Class Information Sheet** provided in this section and also available on the TCTS CD.
- Designate who will be giving the presentation once a date is decided, or if the event is to be held on a set date (e.g., the **ABA Education Foundation's Teach Children to Save Day** held each April).
- Order appropriate ABA Education Foundation resources for the presentation(s). A current list is available on the web at www.abaef.com.
- Determine age-appropriate gifts or giveaways and place orders early, if items are not on hand.
- Contact mayor/county official/governor to obtain a proclamation for **Teach Children to Save Day** presentations.
- Invite local newspaper and television reporters to your presentation.
- The day before your event, send out a press release announcing your presentation. Include why this activity is important to students and the community; use statistics if available. A **Sample News Release** is available in the Communications section of this kit and on the TCTS CD.
- One to two weeks before the presentation, send out a media advisory with personal invitations to local press, notifying them of the scheduled event. See **Sample News Advisory** available in the Communications section.
- Be sure to obtain parental permission to photograph students for bank publications or in the event the press attends. A **Photo Release Example** can be found in this section.
- Request audiovisual equipment at location, if needed.
- Make appropriate copies of lesson material and gather supplies for presentation. Bring master copy of each handout in case more might be needed onsite.



Print from CD