



Part 2: Working with Schools

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Part 2: Working with Schools

One of the biggest obstacles in developing a financial literacy program is determining the best way to reach out to schools. The process can seem overwhelming at first glance. It is important to remember that every school is different – the position of the person who you contact at one school may be completely different from another school. Even schools in the same counties have different policies and procedures when it comes to hosting outside speakers and presentations. It is important that you are patient while also being persistent. Also, working with education means you have to be **flexible!** These steps will help you get started:

1. Identify the preferred topic and timing of your event.

Knowing what works for you and your bank before reaching out to local schools is crucial. Schools are typically on a tight time frame, so knowing your availability beforehand will help those conversations run smoothly. Be sure to give the school plenty of notice (plan for three months lead time).

2. Identify the appropriate age group for the lessons and topics that you're comfortable presenting.

This will help you narrow down your resources and help you create a list of possible schools and organizations with which to work.

3. Consider contacting multiple positions at the school(s).

Reach out to your local school board to get a list of potential school partners in your area. School points of contact to consider:

- Make the most out of any **personal contacts** you may have (teachers at your own children's schools or your teacher friends or those of your co-workers). They may be more receptive to having you be a guest in their building.
- Visit your **local school board's website** to see what contact information is available.
- If you have a specific school in mind that you'd like to work with, you can reach out directly to the **principal**.
- **Guidance counselors** are an excellent resource for all schools K-12.
- **Department chairs** (especially math, economics) and **senior teachers** are a great point of contact, especially at the middle and high school levels.
- Some school systems have specific **content specialists** at the school board level that could be a contact for all the schools in that county.

See the sample school outreach letter on page 8 and calling script on page 9.



4. Have good lesson/presentation plan prepared when you reach out to schools and tie your lesson to the curriculum VDOE Standards of Learning (SOLs).

In your initial contact to schools, send an outline of your presentation, lesson plan, sample handouts, or a copy of the list of recommended books and resources. If possible, tie the lesson to a VDOE Standard of Learning (SOL) to show value and purpose. Offer to set up a time to share your plan in more detail. The teacher will be able to assist with making sure your lesson is applicable to the age and grade level standards. He/she may have suggestions on modifications for the lesson to better fit the needs and capabilities of that specific class and how it fits with the students' prior knowledge. A link to the high school curriculum for the one-credit course on economics and personal finance can be found here:

http://www.doe.virginia.gov/instruction/economics_personal_finance/index.shtml

5. Be a visitor first.

One of the best ways to know what to expect in the classroom is to observe the group before the day of your presentation. Ask if you can come as a guest for an hour or two so you can meet the staff and students and get a feel for the classroom environment and routines.

6. Get to know the teacher and clarify his/her role.

The teacher needs to be involved in the planning process in order to have a successful program. He/she is key in knowing how your lesson ties with SOLs and what baseline knowledge the students in the room have. Also, the presence of the teacher in the classroom during the lesson will help the class stay focused. Will you need them to help with materials? Is there computer or AV equipment available in the classroom?

7. Know the students.

Knowing as much as you can about the students before your lesson will only help with your comfort level. Ask the teacher for a seating chart, special needs information (if any), classroom environment trends and rules, or any other information that they think would be helpful for you to know. No one knows the students better than the teacher that is with them on a daily basis. They may have tips for group work, transition time, taking breaks, etc.



Sample Letter to Schools

[Bank logo]

[Date]

Dear [Name of school contact]:

Virginia was recently recognized by the Council for Economic Education as “leading the charge in preparing students for lifelong financial success,” but there is still work to be done. Financial literacy and understanding the economy are skills that today’s youth need to prosper and succeed.

On [date], [elementary, middle, or high] school students across America will participate in [specific financial literacy program] to gain a better understanding of their financial ABCs. [I/A representative from our bank] would welcome the opportunity to make a presentation to your [# grade students/class] on that date or a date that would work with your schedule.

[I/She/He] want(s) to work with you to ensure [my/her/his] presentation enhances your curriculum and benefits [Name of school’s/your] students as they develop their financial life skills. [My/Her/His] lesson plan is flexible so each activity can be completed in [X minutes]. The presentation includes a variety of activities, including discussion and hands on activities, allowing the students to apply what they know. Enclosed is a sample lesson for your review. [I/she/he] can also discuss what a bank is, how a bank works, or other banking and economic-related information that best fits with your current unit of study [to tie into a particular SOL if applicable].

[Any other information you might want send, such as resources for the teachers.]

[Financial Institution’s name/Our bank] is excited about the opportunity to possibly work with your students.

Thank you very much for considering this offer. [I/We] look forward to discussing the possibility of scheduling a presentation for your students. [I/We] will follow up with you in the near future.

Sincerely,

[Banker Name]

[Bank Name]

[Telephone, Fax]

[Email Address]



Sample Calling Script – VBA Bank Day Scholarship Program

(See Part 4 for Information on this Program)

Hello, I am **[name]** with **[bank]**. I am calling to tell you about a scholarship program available for high school seniors at your school. **[bank]** is partnering with the Virginia Bankers Association Education Foundation and the VBA Emerging Bank Leaders on a scholarship program called Bank Day, during which students from your school will have the opportunity to shadow a banker from **[bank]** for a day to learn about banking, financial services and the vital role **[bank]** plays in the community. From their experience, the students will be tasked with writing an essay based on their time at our bank. The essays will be judged by bankers across Virginia. A winner will be chosen from each of six regions in Virginia and from the regional winners, a statewide winner will be chosen. The regional winners will be awarded a \$2,500 scholarship for the higher education institution of their choice and the statewide winner will be awarded an additional \$5,000 scholarship. Six honorable mention scholarships of \$1,000 each will also be awarded! That's \$26,000 in scholarships total!

In order for the students to participate in the program, they must provide a teacher's contact information, have a cumulative grade point average of 3.0 and be a high school senior. Is this something you are interested in promoting to your seniors?

[If yes] Great, thanks for your interest. I would like to send you a fact sheet on the program, the student registration link and the essay guidelines. Will you provide your email address?

Thanks and I look forward to receiving registration forms from some of your students. If you have any questions, please don't hesitate to contact me at **[phone number and/or email address]**.

[If no] I understand. Do you have a colleague that might be interested in recommending students? Will you pass along that colleague's information?