

**Financial Fitness**

**A Financial Literacy Promotion Project**

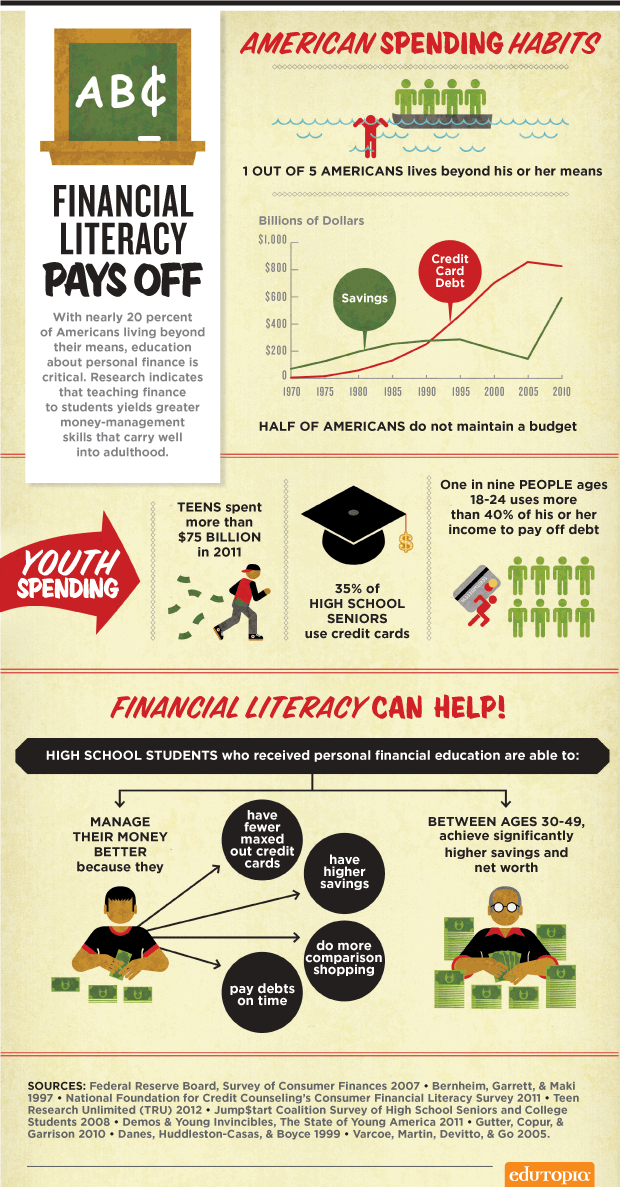
Wealth Management

Spring 2015

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**Financial Fitness: A Financial Literacy Promotion Project**

The ultimate goal of the *Financial Fitness* project is to promote financial literacy to others. As a class, you will identify a school or community group you feel should possess financial literacy skills, determine what specific skills the group needs, develop the workshop content and materials, make arrangements for the workshop, promote the workshop, and finally, deliver the financial literacy training.

In the weeks leading up to and immediately following your financial literacy workshop, you will be responsible for developing a written report—one per class—that summarizes your efforts to plan, organize, implement, and evaluate the *Financial Fitness* workshop. In addition, class representatives should be selected to give an oral presentation to a panel of judges—possibly representatives from local financial institutions. The presentation, which should take place in the days or weeks following the actual *Financial Fitness* workshop, should discuss the main points of the written report.



**Money Does NOT Grow Here**

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| **Financial Fitness Project :: Written Report Criteria** | |
|  | The *Financial Fitness* project class written report must meet the following requirements:   * The report must be typed and double-spaced. * The document can be no longer than 30 pages; appendices are included in the page count. * All pages must be numbered except for the title page and table of contents. * The report must be written on 8½ by 11” paper. * Graphics, including photographs, illustrations, charts/graphs, and artwork, can be used throughout the document. Photographs must be scanned and inserted into the document. * Sheet protectors and divider sheets between sections should not be used. * The document must contain the following components: * **TITLE PAGE** containing: * Project Title * Name of high school * School’s address * City, state, and ZIP code * Names of class representatives * Date * **TABLE of CONTENTS** * **EXECUTIVE SUMMARY** * Maximum length: one page * Focus: project description * **INTRODUCTION** describing: * Class, school, community * **MANAGEMENT OF ACTIVITIES TARGETED AT OUTSIDE AUDIENCE** addressing: * How the activities were planned * What the activities were * The purpose of the activities * How those activities were organized * How the activities were carried out * **EVALUATION AND RECOMMENDATIONS** * Evaluate the project * Provide recommendations for new activities for the future * **BIBLIOGRAPHY** * **APPENDIX**, optional   + Questionnaires, letters, background data, etc. |
| **Financial Fitness Project :: Oral Presentation Criteria** | |
|  | Students chosen to represent the class should give a 10-minute oral presentation to a group of judges (e.g., business professionals from local financial institutions). In the oral report, these two or three class representatives should explain and describe their class’s *Financial Fitness* project.The presentation should be followed by a question-and-answer session. Judges should ask questions about the project and students’ knowledge of financial literacy.Students are permitted to use note cards and visual aids during the presentation. Visual aids can include standard-sized posters, display boards, a personal laptop computer, etc. |

**Written Report Evaluation Form**

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| **Criteria** | **Exceeds Expectations** | **Meets Expectations** | **Below Expectations** | **Little/ No Value** |
| EXECUTIVE SUMMARY  1. One-page description of the project | 7-6 | 5-4 | 3-2 | 1-0 |
| INTRODUCTION  2. Description of the class, the school, and the community | 7-6 | 5-4 | 3-2 | 1-0 |
| MANAGEMENT OF ACTIVITIES TARGETED AT OUTSIDE AUDIENCE  3. Purpose of activities  4. Planning and organization of activities  5. Implementation of activities | 8-7  8-7  8-7 | 6  6  6 | 5-4-3  5-4-3  5-4-3 | 2-1-0  2-1-0  2-1-0 |
| EVALUATION AND RECOMMENDATIONS  6. Evaluation of project  7. Recommendations for new activities | 8-7  8-7 | 6  6 | 5-4-3  5-4-3 | 2-1-0  2-1-0 |
| APPEARANCE AND WORD USAGE  8. Professional layout, neatness, proper grammar, spelling, and word usage | 6 | 5-4 | 3-2 | 1-0 |

**Oral Presentation Evaluation Form**

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| --- | --- | --- | --- | --- |
| **Criteria** | **Exceeds Expectations** | **Meets Expectations** | **Below Expectations** | **Little/ No Value** |
| PRESENTATION  1. Description of the project; organization, clarity, and effectiveness of the presentation and involvement of all presenters  2. Description and value of activities | 7-6  7-6 | 5-4  5-4 | 3-2  3-2 | 1-0  1-0 |
| KNOWLEDGE OF THE PRESENTERS  3. A question about knowledge of financial literacy  4. A question about knowledge of the importance of financial literacy  5. A question about the activities completed | 7-6  7-6  7-6 | 5-4  5-4  5-4 | 3-2  3-2  3-2 | 1-0  1-0  1-0 |
| GENERAL  6. Professional standards (appearance, poise, and confidence), presentation technique, effective use of visuals, and participation of all | 5 | 4 | 3-2 | 1-0 |