



What is Financial Fitness Greater Austin?

Financial Fitness Greater Austin (FFGA) is a financial education and awareness initiative in partnership with the Alliance for Economic Inclusion and more than 60 entities in the Greater Austin area.

FFGA is scheduled for **April 19-26, 2015**.

The goal of FFGA is to provide financial awareness and information to the Greater Austin community and emphasize the importance of financial literacy and the need for consumers to be proactive about managing their finances.

This is achieved through the collaboration and the coordinated effort of dozens of organizations across Austin and surrounding areas including businesses, financial institutions, schools, libraries, not-for-profits, and government agencies.

These groups work together throughout the year to stress the importance of financial literacy, inform consumers where they can get help, and provide free educational seminars and activities during the month of April. Classes and events are offered to all demographics and cover all facets of personal finance from establishing a budget to first time home buying to estate planning. 2015 marks Financial Fitness Greater Austin's eighth campaign.

What is an FFGA partner?

Partners are expected to provide leadership, communicate internally and externally, possess or acquire general financial literacy knowledge and be committed to the FFGA program.

Current partners include businesses, financial institutions, schools, libraries, not-for-profits, government agencies and the media. Please visit www.financialfitnessaustin.org to see a list of 2014 partners.

An FFGA partner is an organization that signs a Partnership Agreement and actively agrees 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 FFGA.

Types of Partners

- Event
- Host
- Instructor
- Sponsor
- Committee Member



FFGA 2015 Partnerships

FFGA currently has approximately 60 financial education partners that include businesses, financial institutions, schools, libraries, not-for-profits, government agencies and the media. FFGA Partners are expected to adhere to the following guidelines.

FFGA Event Partners

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. Closed events will be included for appropriate audiences, but may not be publicized as part of the public event calendar.

Event partners should be able to:

- Implement, as able, additional marketing and/or promotional strategies for their individual events to secure attendance.
- Appoint a representative to manage FFGA activities and to allow for attendance at monthly planning meetings leading up to the event.
- Provide vision, leadership and general direction to third-party sponsors/presenters.
- Submit FFGA Host and/or Event Partnership Form on or before the given deadline.
- Complete and return measurements package including attendance numbers for all events, partner surveys, participant surveys, photos, photo release forms, media clips and samples of any other promotional materials used during the campaign.

FFGA Host Partners

- Provide space for an FFGA event. Please note that most Host Partners are also Event Partners.
- Submit FFGA Host Partnership form on or before the given deadline.
- Work with the FFGA Coordinator and the Event Partner to ensure the venue is accessible to the Event Partner's target audience and has adequate seating for the expected audience.
- Work with the FFGA Coordinator and the Instructor to ensure the venue meets the needs of the Instructor.

FFGA Instructor Partners

- Submit the Instructor Request or Information (RFI).
- Attend FFGA training session.
- Ensure teaching materials are onsite for the class.
- Be prepared to teach the topic.
- Know where the class will be held and be on time.
- Complete and return measurement package including attendance, partner survey, participate surveys, instructor survey and any pictures with photo release forms.
- Sales pitches and/or commercial marketing are strictly prohibited.



How to Coordinate an Event with FFGA

The Event Partners work with an FFGA Coordinator to provide for the timely completion of all tasks leading up to and through FFGA including submission of event information and measurement package. It is recommended that Event Partners attend FFGA partner meetings. Please visit www.financialfitnessaustin.org for a list of meeting dates or contact your FFGA Coordinator.

The Event Partner identifies the target audience(s) (i.e. seniors, women, unbanked, youth, etc). This is usually the target audience the Event Partner serves.

The Event Partners may select and secure a venue or ask for assistance from the FFGA Coordinator.

The Event Partner may select a topic from the list of approved topics. Please visit www.financialfitnessaustin.org for a complete list of topics.

The Event Partner may select a presenter/speaker or request a volunteer presenter from FFGA. The Event Partner may request curriculum and class materials if they select their own presenter.

Complete the Host/Event Form(s) and turn it in to the FFGA Coordinator.

The Event Partner will act as liaison between third-party participants and the partners. This includes FFGA Coordinators, Volunteer Instructors, attendees and the Host Partner.

The Event Partner will promote the event to ensure maximum attendance. Visit www.financialfitnessaustin.org to see resources available from FFGA.

The Event Partner will gather surveys (event, host, instructor and participant), attendance sheets and digital photos/photo release forms and submit them to the FFGA Coordinator.

The FFGA Coordinator works with the all of the Partners to determine needed assistance. The FFGA Coordinator then forwards the request to the appropriate committee. The Event Partner and the FFGA Coordinator work together to ensure the logistics are in place prior to the event.

FFGA Forms

Please visit www.financialfitnessaustin.org or contact your FFGA Coordinator to obtain the forms.

Forms needed prior to event:

- Event Partnership
- Host Partnership
- Instructor Partnership

Forms needed at the time of the event:

- Attendance Sheet
- Event Survey Form
- Host Survey Form
- Instructor Survey Form
- Participant Survey Forms
- Photo Release Forms if pictures of attendees are taken.



Financial Fitness Greater Austin 2015 Committees

Leadership: The Leadership Committee consists of the FFGA Chair and the Chairs of each committee. Their role is to ensure each committee stays on task and meets or exceeds their goals.

Fundraising: The Fundraising Committee works to raise funds for contest winners, door prizes for classes, promotional materials, lunches for selected events, etc.

Marketing: The Marketing Committee coordinates the FFGA Kick-off Event with Committee Chairs and the \$mart Kids Essay Sponsor. They work to receive press coverage for events (TV, radio, newspapers, community calendars, etc). They also create and distribute the marketing materials such as "save the date" cards, bookmarks, posters and event flyers.

Media: The Media Committee Works hand in hand with Marketing Committee. It manages media relations for advance & after event coverage. And establishes and maintains press contacts, sending out releases surrounding FFGA.

Website: The Website Committee keeps the FFGA website up to date year-round and updates classes and events on FFGA Google Calendar. Works with Media Committee to keep Facebook account up to date.

Outreach: The Outreach Committee works with the Event/Host Partners to coordinate the classes. Once the Partnership forms have been received, the forms are submitted to the Logistics Committee. The committee members are the FFGA Coordinators.

Logistics: The Logistics Committee reviews the forms and submits copies of the forms to other committees as needed. The Logistics Committee works with all committees to ensure each event has a venue, instructor, classroom materials, marketing (if requested), etc. and coordinates Spanish speaking presenters for bi-lingual and Spanish language presentations and outreach.

Youth Contest: The Youth Committee works with the sponsor and the schools to obtain essay contest entries. The committee also helps to select the judges for the contest. They also work with the sponsor to ensure there is a media event to announce the winners. This committee also works with Junior Achievement to provide in-school classes during FFGA.

FF Adult Contest: The FF Adult Contest Committee creates the contests and works with other committees to distribute the contest to the FFGA target audience. The committee works to ensure prize money is in place before the contest is made public. The committee also selects the Judges for the second tier of the contest. The committee is also responsible for making sure media releases are in place for the winners.

Outcomes: The Outcomes Committee will establish a procedure to follow up with some of the event participants to see if they have made any changes in their financial situation as a result of FFGA. The Outcomes Committee is also responsible for the annual report based on the surveys collected.

FFGA 2015 Committee Structure

Each Committee will establish a meeting schedule. At least one meeting a month is recommended for most committees. Committee Chairs will be expected to provide an update in the form on minutes that will be passed out at general meetings.