EVERFI

Financial Literacy Month Toolkit | K12 Courses

Event Logistics: Guide & Resources

An complete toolkit of turnkey resource designed to give you all you need to plan and execute a classroom event. This document includes an event overview, activity and instructions, run of show, and speaking points. The speaking points are yours to edit and make your own. The Fi-Q Trivia activity works well for classroom visits, but if you have a successful event concept that your volunteers are already familiar with, feel free to move forward and substitute that activity instead!

Event Description

On **[EVENT DATE]** representatives from the **[INSTITUTION NAME]** and EVERFI will visit **[SCHOOL NAME]** to celebrate **[GRADE LEVEL]** students who have started the **[PROGRAM NAME]** financial education program. Students will play a financial jeopardy style trivia game, called Fi-Q, that reinforces the lessons and skills learned through the program.

This event will provide students with a meaningful opportunity to hear from community leaders and test their new financial knowledge. Key remarks will also be given by **[VIP or EXECUTIVE NAME]**.
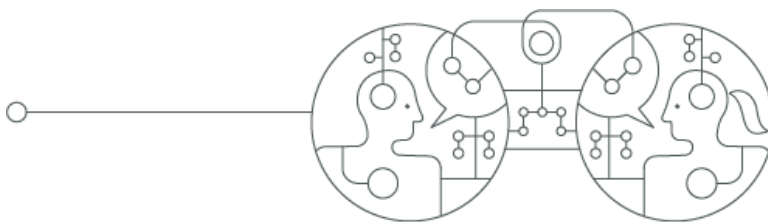
Date and Time:
[DAY, MONTH DATE, TIME]

Location:
[SCHOOL NAME]
[ADDRESS]
[parking info if you have it]

Using Online Fi-Q

Step 1: Access the Game Online
Vault: https://everfi.com/fiq-game-vault/
FinLit: http://everfi.com/fiq-game/

Step 2: Before Entering the Game - Customize the Screen
- First, click the EVERFI logo in the top left hand corner to add in the partner logo. Do a quick google search to find a URL for the logo and plug that URL into the box that reads: "To change the logo, paste the image's url below". On this same screen you can also update the name of the trivia game to be "**[INSTITUTION OR PROGRAM NAME]** Trivia" to make it even more custom.
- Then, you will return to the home screen. Select the number of teams and grid layout (number of question options).
- Click "Start"

Step 3: Play the Game:
- Once inside, simply click on a box (ex: Saving and Investing for 100), wait for the students to submit their answer, and then click "Show Answer" to reveal the correct answer.
- If the team is correct, click "+" to award the points, but if they chose the wrong answer, click "-" to subtract the points from their total score.
- Then, click continue to navigate back to the questions board and select another question box and repeat.
- Team names are editable, so for example if you are playing a game with teams from two different teachers' classes you can click "Team 1" and enter in the name of the participating teacher or let the students select their own name.

Event Flow/ Run of Show

Time	Event Activity
5 Mins	Students Arrive and Get Settled
2 Mins	Teacher Introduction
3 Mins	Welcome Remarks (from Institution Representative)

6 Mins	Fi-Q Trivia Game Overview
30 Mins	Play Trivia Game
5 Mins	Conduct Student Q&A
5 Mins	Group Photo & Event Wrap

Speaking Points

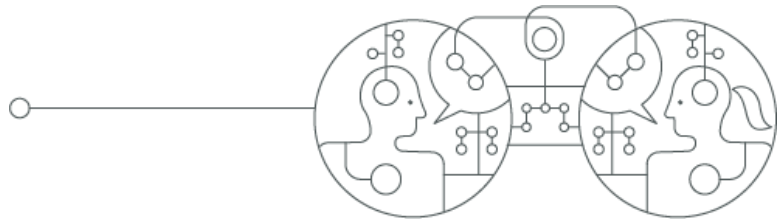**Event Begins:** TIME – TIME (5 minutes)
Class period begins, give students a chance to get seated.

Teacher Introduction: TIME-TIME (2 minutes)
- Good **[MORNING/AFTERNOON]** students!
- Over the past few months you have learned about many personal financial topics. I hope that as you make financial decisions in your daily lives – as I know you all do – that you think back to this experience.
- Today we are joined by **[INSTITUTION NAME]** associates, who sponsor the **[PROGRAM NAME]** that we've all used over the past few months to have a bit of fun with all the personal finance lessons we have learned.
- It is my pleasure to introduce **[NAME & ROLE]** from **[INSTITUTION NAME]**
- We have a fantastic group of people with us today, who have gathered here to celebrate the power of financial education. These are very special guests so I want us all to be on our best behaviour.
- To **[INSTITUTION NAME]**, we are so grateful to you for bringing this program to our school. Students need these critical life skills. Thank you for your commitment to our community and future leaders.

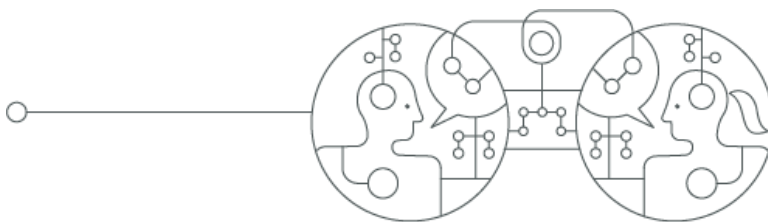**Welcome Remarks:** TIME – TIME (3 minutes)
- Good Morning Students! *[Pause and encourage students to say good morning back]*. My name is **[NAME OF PERSON]** and I am **[ROLE]** at **[INSTITUTION NAME]**.
- Thank you so much for giving me the opportunity to be here with you all today. It is an honor.
- Students, did you know that April is Financial Literacy Month? Which makes April the perfect time to celebrate YOU and reflect on what you have learned through the **[PROGRAM NAME]** program.

- You've all already learned so much about how to manage your money - and all through an interactive, online course. That's pretty cool, and something that was not available when I was your age, so I must admit I'm pretty jealous.
- *[Personal anecdote about the importance of financial education by reflecting on individual experience]*
- *[OR pepper in a few statistics]*
    - For 64% of Americans, money is a significant source of stress. Source.
    - 61% of college students have student loans, of those 74% have $10k-$40k+ in student loans. Source.
    - The average college student graduates owing more than $30,000 in student loans. Source.
- We at **[INSTITUTION NAME]** hope that **[PROGRAM NAME]** helps to prepare you to make smart financial decisions. Financial literacy is so important, not just in April but for the rest of your life. **[PROGRAM NAME]** is one important resource for you. It's important to remember that you have help in the form of your family, trusted adults, and also your financial institution to help guide you when you have questions.
- *[Introduce other any other special guests in the room]*
- Now, I'm going to turn it over to **[NAME OF PERSON]** from EVERFI to explain a fun game.

Fi-Q Overview: <mark>TIME-TIME</mark> (6 minutes)
- Good morning! Students and guests, it is my pleasure congratulate you for taking this first step in your financial future. Give yourselves a round of applause!
- Here in **[NAME OF TOWN/AREA]** we know that in order to prepare our community for bright financial futures, we need to provide resources that are engaging, interactive and of course, digital.
- Our community is fortunate to have strong supporters like **[INSTITUTION NAME]**. to support financial education in our schools. Quality resources are critical components to the success of teaching these critical skills, and creating a happy and healthy community.
- Now who's ready to play a game? It's time to play Fi-Q Trivia!
- Before we start, I want to explain how this game is going to work. We're going to split the room up into two teams *[left vs right, or easiest way to divide class]*. Each team will send a representative to the front of the room and we're going to ask you both the same question.
- If both of you get the question right, then both teams get the points, but if you get the question wrong we will subtract points.
- The team that has the most points at the end of the class period wins!

- Any questions? *[pause]*
- Okay, then let's divide the room from here over. Please take 2 minutes to brainstorm your team name.

Play Trivia Game: TIME – TIME (30 minutes)

Conduct Student Q&A: TIME – TIME (5 minutes)
- Wow, great job to both teams! Give yourselves a round of applause.
- Now, for the reaping – the winning team was **[TEAM NAME]** with **[# OF POINTS]** . Congratulations! Let's have a round of applause for your classmates! You all did a great job at the Fi-Q game.
- In the meantime, I'm going to open up the floor – what questions do you have for our guests here today? These are experts in their field and have a wealth of knowledge about personal finance, career tips, and more – so please, fire away!

[Students ask questions]
If students are shy initially, pull from the below to get them talking
➔ *Who likes money? Why do you like money?*
➔ *How do you earn money today? Does anyone have a job? Do you babysit? Mow lawns? Help with chores around the house?*
➔ *What do you do with the money you make?*
➔ *Why is it important to be smart about your money?*
➔ *What are some smart things to do with your money?*
➔ *Tell me one thing you'll tell your folks at home about what you learned today?*

- Thank you for asking such thoughtful questions! We are coming to the end of the class period, but before we go we'd like to get a photo with the whole group. Please come together at the front of the room and I'll take your picture.

Group Photo: TIME – TIME (5 minutes)
Conclude the program with a group photo of the entire class, teachers, and other guests.

Media Release forms are required for your institution to publish or share photographs of the students, who are minors. Work with your Customer Success Manager to collect and catalog those from the school.

Event Concludes: TIME
Students depart for next class period.