



AAUW PROGRAM IN A BOX

FINANCIALLY FIT FOR LIFE

AT A GLANCE

FINANCIALLY FIT FOR LIFE

PROGRAM OVERVIEW

Use this Program in a Box to help women in your community take charge of their financial well-being.

INTENDED AUDIENCE

All women

PROGRAM FORMAT

Workshop or half-day conference

TIME CONSIDERATIONS

Time frame: Anytime

Estimated planning time: Six months

Estimated presentation time: Two hours to a half-day

RESOURCES NEEDED

Staff: One program coordinator and a program committee

Advertising: Flyers, state/branch newsletter, e-mail dissemination, local paper, Facebook

Handouts: AAUW membership brochures

Other: Light refreshments

Budget considerations: Photocopying materials, making name tags and tent cards, and serving light refreshments

BENEFITS TO YOUR STATE, BRANCH, OR COMMUNITY

- Provides women with essential financial knowledge on how to secure their futures
- Offers AAUW visibility as a community leader and advocate for women
- Offers membership recruitment opportunities
- Offers the ability to establish community partnerships
- Offers fundraising opportunities from your business community

PROGRAM DETAILS

FINANCIALLY FIT FOR LIFE

OVERVIEW

This workshop or half-day conference helps women understand and improve their financial well-being. AAUW members, branches, or states can plan and deliver the workshop at the grassroots level, drawing on local experts to educate women about universal financial issues as well as financial issues unique to their state. Participants learn valuable skills to help them secure their financial futures, have the opportunity to network and share knowledge through peer-to-peer interaction, and receive additional resources for financial planning.

To ensure a large audience of women of all ages, consider partnering with local organizations such as student groups, AAUW college/university partner members, educational institutions, women's groups, professional organizations, and financial professional associations.

FIRST STEPS

Financially Fit for Life workshops are easy to implement because of their flexibility.

- Review the resources in your community to determine what is available and if they are geared toward women.
- Select a planning coordinator who is motivated, a self-starter, enthusiastic, and has an understanding of AAUW's work.
- Establish a planning committee consisting of a chair and a few other members who have experience in the world of finance.
- Select the location, time, and date of your workshop.
- Publicize your workshop through your AAUW leadership and membership e-mail networks, press releases to local media outlets and other women's organizations, announcements in community papers, and flyers.

PROGRAM LOGISTICS

SELECT THE PANEL

Select a maximum of three panelists for a two-hour session. One of the panelists should be a financial planner. The other two panelists may include an attorney knowledgeable about marital statutes and estate planning, a stockbroker, an accountant or CPA, a fraud investigator or identity theft specialist, an insurance adviser, an AAUW member or researcher with expertise in women's economic security, a psychologist who can speak about the emotional aspects of money, or a representative of your local government or nearby educational institution who can describe the resources that institution offers to women pursuing further financial education.

Select a competent moderator who can relate the information to AAUW's mission and point out other AAUW products and services that address women's financial security, redirect the workshop if necessary, and ensure people's questions and comments are addressed.

CREATE AN AGENDA

- Begin the workshop on time.
- Allow 10 to 15 minutes at the beginning for networking and refreshments.
- The moderator should make opening remarks that include what the program is and information about AAUW’s work to promote women’s financial security. The moderator should also introduce the panel.
- Each panelist should speak for no more than 20 minutes.
- Leave ample time for questions and answers.
- Thank the panelists and remind participants to complete and turn in evaluation forms.
- If time and space permit, encourage panelists and participants to mingle and talk after the formal session ends.

GENERAL LOGISTICS

- Choose your location well. Make sure it is easy to find, has adequate parking, is wheelchair accessible, is preferably near public transportation, and has ample room to accommodate the panelists and attendees.
- Consider the room’s acoustics. You may need a microphone (preferably wireless) and speakers.
- Provide light refreshments.
- Prepare name tags for participants and tent cards for the panelists and moderator.

RESOURCES

- Recruit branch members to help with program development, provide AAUW materials to enhance the program, and serve as a liaison to national staff for technical support.
- Ask branch members to help identify knowledgeable presenters or event moderators.
- Use the Financially Fit for Life checklist (below) to get your workshop under way.
- Review the following suggested next steps after your workshop.

NEXT STEPS

To be financially fit requires ongoing education as well as an ongoing reevaluation of financial decisions as life circumstances change. This workshop can be the first of many other valuable AAUW programs. Review the evaluations from your workshop for follow-up ideas. Some possibilities that emerged from the pilot phase of this project are listed below.

- Develop (or make available) a basic course to help women understand financial vocabulary, or ask your panelists if they can provide a basic glossary as a handout.
- Develop a workshop to help women (and their partners) plan for financial security in widowhood. Alternatively, determine whether such programs are already available in your community and publicize them at your workshop.
- Plan a follow-up session to explore how women can facilitate good relationships among their financial advisers (e.g., financial planner, estate planning attorney, or accountant).
- Given the high percentage of AAUW members who are teachers or retired teachers, consider arranging for specialized, state-based financial planning sessions for current and retired teachers.
- Develop a community outreach program—perhaps in partnership with an after-school program or girls’ club—that introduces girls and young women to financial literacy education.
- Invite one or more of your speakers back to present a subsequent, more in-depth workshop on a topic requested on the evaluation forms.

MEMBERSHIP RECRUITMENT

Membership matters! Help grow the AAUW community by inviting prospective members to your event and encouraging them to join AAUW. Visit the [membership campaign website](#) to learn more.

If your event involves college and university faculty or students or is held on a campus, invite schools that are not yet AAUW college/university partner members to join AAUW and offer their students the benefits that go with AAUW membership. All students attending a C/U partner member institution are eligible to join AAUW for free as an e-student. For more information visit the AAUW college/university partner [recruitment web page](#).

ACKNOWLEDGMENTS

Thank you to Prudential Financial for its generous grant, which made the initial planning and pilot phase of Financially Fit for Life possible. Prudential Financial's biennial surveys of financial experience and behaviors among women have documented that women want to be financially fit, but can be stymied by lack of confidence and knowledge and sidetracked by day-to-day responsibilities. Many women allow themselves to be overwhelmed by short-term priorities at the expense of the longer-term financial planning they know they need to do. View the most recent survey on Prudential Financial's [website](#) for more information.

Thank you also to Fran Rothstein from Rothstein Consulting for her diligent consulting work.

TOOLS

FINANCIALLY FIT FOR LIFE

FINANCIALLY FIT FOR LIFE TOOLS

- Financially Fit for Life checklist (see below)
- Financially Fit for Life frequently asked questions (see below)

PROGRAMS-IN-A-BOX TOOL KIT

Includes forms, checklists, and templates that you can modify and adapt for your program or event. The following may be helpful in planning this program:

- Attendee sign-in form
- Event evaluation form
- Event planning checklist
- Event registration form
- Photograph release form
- Press release template
- Sample time line

MEMBERSHIP RECRUITMENT TOOLS

- [Individual members](#)
- [AAUW college/university partner members](#)

CONTACTS

- For questions or information about this Program in a Box, contact connect@aauw.org or 800/326-2289.

FINANCIALLY FIT FOR LIFE CHECKLIST

FINANCIALLY FIT FOR LIFE

- Form a planning committee to organize the workshop (optional).
- Brainstorm about financial literacy programming and topics that will be most beneficial for your members and community.
- Determine the length of the program, the location, potential partner organizations (if applicable), and a budget.
- Find panelists. Select three panelists who are knowledgeable about financial planning.
- Confirm the speakers about a month in advance of the workshop.
- Find a moderator.
- Publicize the workshop with fliers, press releases, announcements for the calendar section of community papers, and e-mails.
- Prepare name tags for participants.
- Make tent cards for the panelists and moderator.
- Provide participants with the names and contact information for the panelists.
- Serve light refreshments.
- Prepare evaluations for the participants to fill out (see the sample in the Programs-in-a-Box [tool kit](#)).
- Write thank-you letters to the panelists and moderator.
- Evaluate the success of the workshop and decide on the next steps for promoting financial literacy among your members and in the community.

FREQUENTLY ASKED QUESTIONS

FINANCIALLY FIT FOR LIFE

Q: WHAT DO I NEED TO DO TO ESTABLISH A PLANNING COMMITTEE?

A: Establishing a planning committee is optional; however, forming a planning committee will provide support for all aspects of the workshop. To begin, identify a chair and then invite several members who have the strengths to accomplish various tasks. A planning committee may include panelists and individuals in charge of marketing and outreach, logistics, volunteers, and so forth.

Q: HOW CAN I BOOK THE BEST PANELISTS?

A: First decide upon the specific financial topic for the workshop. This will determine the mixture of panelists you need. Then canvass your community for experts on the workshop topic. Fellow AAUW members and community leaders can offer recommendations for panelists who would be best for your audience.

Q: HOW MUCH TIME AND MONEY DOES IT TAKE TO PLAN AND ORGANIZE A WORKSHOP?

A: A successful workshop requires planning. To gather panelists and have enough time for outreach and marketing, start planning at least six months before the workshop. Financially Fit for Life is a low-cost, high-impact program. The costs to your AAUW branch or state will primarily be copying materials, making name tags and tent cards, and serving light refreshments.

Q: HOW CAN A FINANCIALLY FIT FOR LIFE WORKSHOP BE AN EFFECTIVE OUTREACH AND MEMBERSHIP RECRUITMENT TOOL?

A: Financially Fit for Life workshops provide a great opportunity to attract new members, earn local recognition of your AAUW branch or state, and advance AAUW's mission. Publicize widely and consider partnering with a local organization to ensure a large audience of women of all ages. Local student groups, AAUW college/university partner members, educational institutions, women's groups, professional organizations, and financial professional associations all make good partners.

Q: IS FINANCIALLY FIT FOR LIFE A ONE-TIME WORKSHOP?

A: No. Your first Financially Fit for Life workshop will be only the beginning. Once you hear the range of questions members and participants ask and issues they raise, you will gain insight into additional programs you may wish to organize. In future sessions you can delve into specific aspects of financial planning and promoting women's financial independence through education. Check out the next steps section of this Program in a Box for ideas on how to follow up after a workshop.