



# Financial Education Workshops

*Working for America*

UNITED STATES OFFICE OF PERSONNEL MANAGEMENT



# Message from the President

*“Government must support policies that promote and protect saving. And saving is the path to independence for Americans in all phases of life, & we must encourage more Americans to take that path.”*

**- George W. Bush**



# Message from the Director



*“The Federal government has excellent retirement systems, but many employees are very poorly informed about them. We all must work harder to educate them about their retirement benefits and help them plan for the future.”*

**- Kay Coles James**

# Why?

- Increased interest in the financial education and literacy of Americans.
- Studies consistently show that employees look to their employers for financial education & trust the information they receive in the workplace.



# Purpose

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- Develop guidelines and best practices
- Match developers/providers with audiences



# Locations of Multi-agency Workshops

- Philadelphia
  - William J. Green Federal Building
- Atlanta
  - Richard B. Russell Federal Building
- Chicago
  - Ralph H. Metcalfe Federal Building
- San Francisco/Oakland
  - Ronald V. Dellums Federal Building

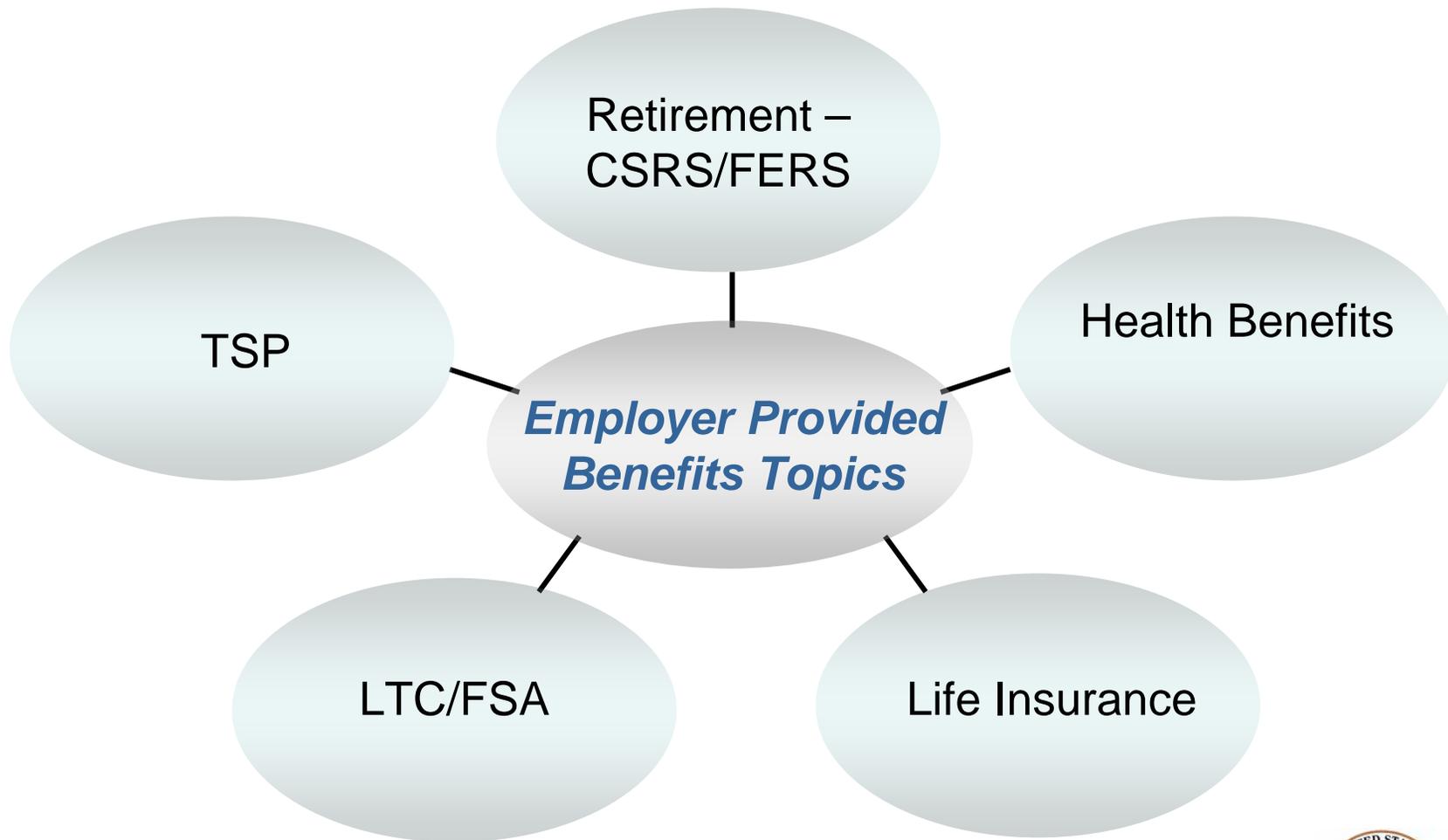


# Format

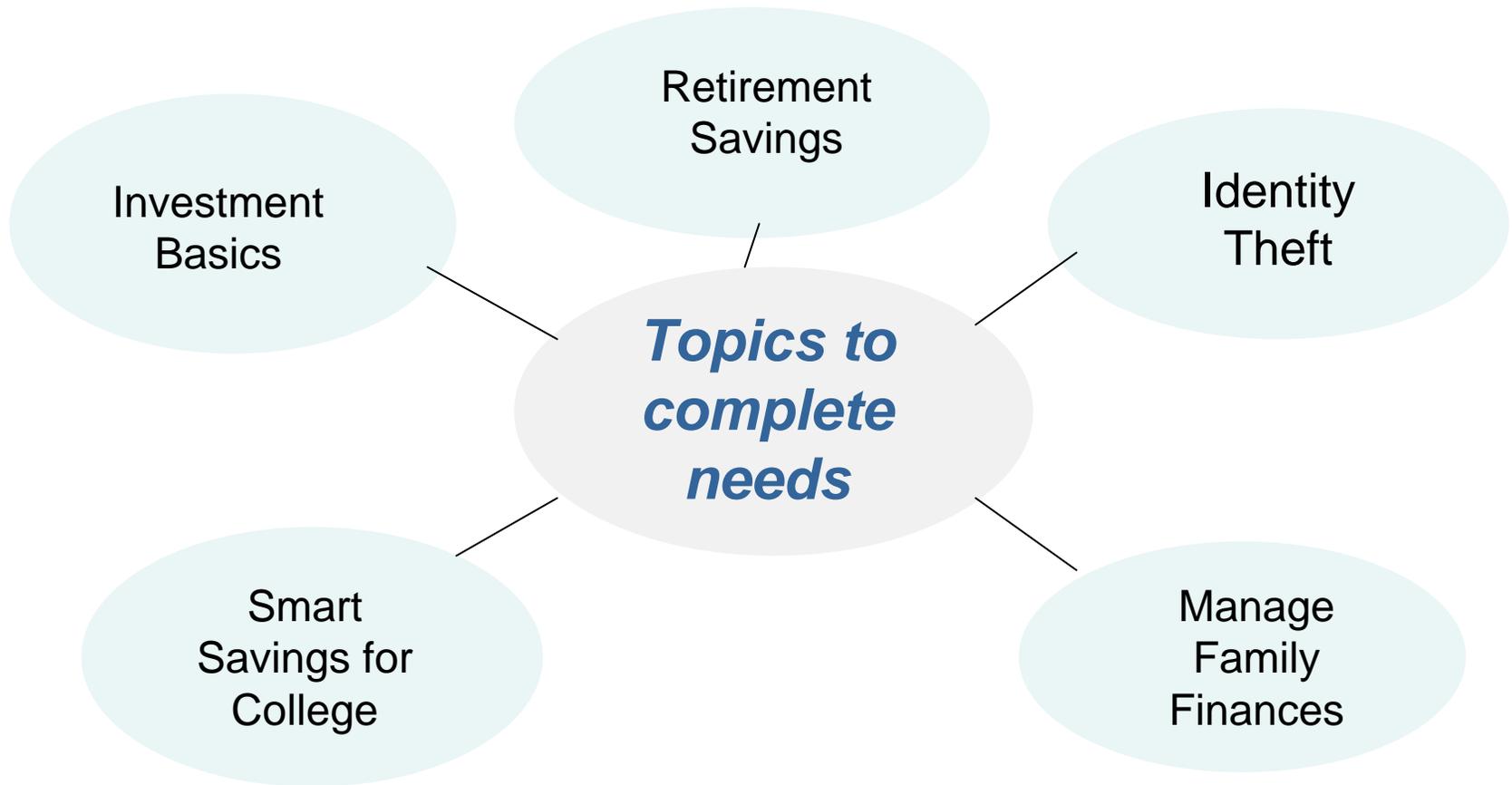
- Table top displays in a high traffic public space, such as a cafeteria or lobby.
- Series of 3 – 6 workshops on financial education topics that will be of high interest to Federal employees. 45mins with 10min for Q&A



# Format-Topics



# Format – General Topics



# Exhibitors & Speakers

- Federal Agencies
- Broad-based professional organizations
- Not-for-profit organizations
- Many agencies/organizations have as part of their mission to educate on financial matters, such as:



# Exhibitors & Speakers

- SEC
- FDIC
- SSA
- USDA Extension Service
- FRB
- SBA
- DOL/Women's Bureau
- FRTIB (TSP)
- LTC Partners
- SHPS, Inc (FSA)
- FTC
- Incharge Education Foundation
- State Treasurers
- ASEC
- CFP Board of Standards



# Speaker Ground Rules

- There are three simple ground rules for speakers.
- 1. Do not promote any particular products, services, professional credentials, firms, or individuals. Convey the uniform message that there are many alternatives & wise consumers investigate & understand their options.



# Speaker Ground Rules

- 2. Do not distribute business cards or other materials with the name of your company or your business address on them, even if you are approached by an attendee.



# Speaker Ground Rules

- 3. You are acting as a representative of a broad-based professional organization, not your firm. For example, you will be introduced as “John Doe, representing the Securities Industry Association”, **NOT** “John Doe from XYZ Company”.



# Publicity



# Logistics

- High traffic area
- Exhibitors in open space such as lobby at entrance to building or lobby next to cafeteria
- Workshops located in close proximity of exhibitors
- Traffic flow from exhibitors to workshops and reverse



# Feedback

- Evaluations from attendees
  - How helpful was the Fair
  - Suggestions for future topics
  - Use feedback form as an entry form for drawing
- Evaluations for each workshop



# Lessons Learned

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- Build local partnerships
- Desire for information
- Publicity, Publicity, Publicity



# Next Steps

- Large event – once or twice
  - Use most common topics
  - Optimize exhibitor attendance
- Smaller events – monthly, quarterly
  - Use suggested topics from attendees
  - Repeat most popular topics from larger event



# Contact Information

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- For more information,
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