

GLOBAL MONEY WEEK TOOLKIT 2017

FINANCIAL INSTITUTIONS

GMW2017's theme: 'Learn.Save.Earn.'

27 March - 2 April 2017



✓ www.globalmoneyweek.org     #GMW2017 #GlobalMoneyWeek #LearnSaveEarn

GMW 2017 Toolkit series are guidebooks to help you plan your Global Money Week (GMW) events and activities in your country. This provides an overview of the Week, and how to ensure that children and youth in your community participate and learn more about finance and entrepreneurship! The complete series of Toolkits has been prepared for: • Government institutions • Corporate companies • SMEs & entrepreneurs • Financial institutions • Universities, students & alumni • Teachers & schools • Parents & guardians • Money museums • Civil society • Youth | GMW Toolkits are available for download here: ✓ www.globalmoneyweek.org 'Resources' section

JOIN GLOBAL MONEY WEEK





Read more: www.globalmoneyweek.org 'About' section

Theme: 'Learn.Save.Earn.'
27 March - 2 April 2017

Global Money Week (GMW) is an annual global celebration, initiated by Child & Youth Finance International (CYFI), with local and regional events and activities aimed at inspiring children and youth to learn about money, saving, creating livelihoods, gaining employment and becoming an entrepreneur.

Where? **Everywhere.** GMW is an international week – with many events, activities, projects, launches and competitions taking place in over 130 countries.

Who? **Anybody. Anywhere. Anytime** - can get involved in GMW. Whether you are a student, employee, parent or guardian. Whether you are from an educational institution, financial authority, NGO, government institution, company, or community organization.

Connect with GMW www.globalmoneyweek.org    

GMW2017'S THEME

'Learn.Save.Earn.'

Learn

Educating children and young people about their social and economic rights and responsibilities is key to creating a generation of capable adults who can make wise decisions for their future.

Save

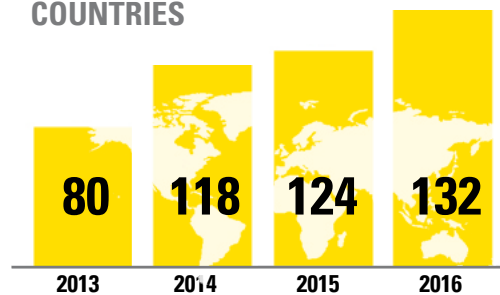
It is important for children and youth to build clever savings habits from an early age in order to cultivate key money-managing skills for later in life.

Earn

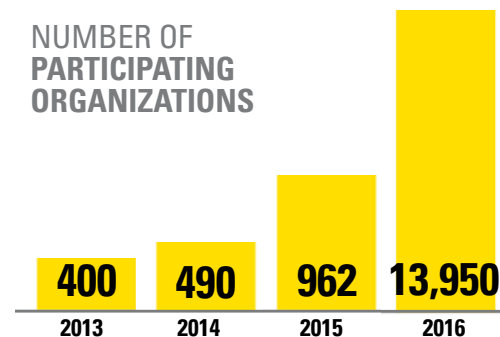
Developing livelihoods skills or receiving entrepreneurial training supports children and young people with getting a job or building their own business and developing their careers.

GMW GROWTH

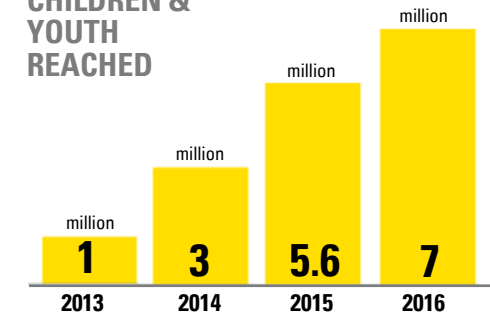
NUMBER OF PARTICIPATING COUNTRIES



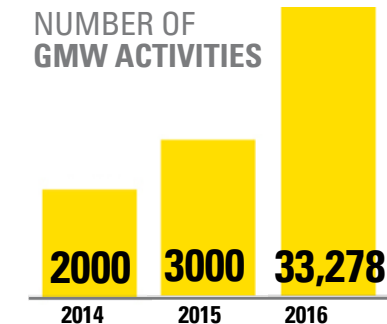
NUMBER OF PARTICIPATING ORGANIZATIONS



NUMBER OF CHILDREN & YOUTH REACHED



NUMBER OF GMW ACTIVITIES



*GMW 2012 outreach: 33 000 children and youth in 21 countries (Child Finance Day/Week)

HOW TO SIGN UP?

There is no participation fee or registration needed. Simply, get in touch with our CYFI Team. We will provide support and resources, or can connect you with events going on in your country!

Fill in the Global Money Week contact form here: www.globalmoneyweek.org/about/contact.html

Or, should you have questions, please contact us:

Child & Youth Finance International (CYFI) | PO Box 16524, 1001 RA Amsterdam, the Netherlands
E info@childfinance.org | T +31 (0)205203900 | www.childfinanceinternational.org

JOIN OUR GLOBAL ACTIVITIES

Read more: www.globalmoneyweek.org 'Events' section



In addition to events in your community and country, you can get involved in our global activities, in the run up to, during, and after GMW2017!

PREP TALKS

Prior to GMW we hold Prep Talks (online webinars via WebEx) to help you get ready for your GMW activities. The Prep Talks will take place in Fall/Autumn 2016 to help you get your GMW up and running. Prep Talks also give you a chance to connect with the CYFI Team, ask questions, and share useful resources and documents.

GMW SELFIE CHALLENGE

GMW time is always Selfie Time! Last year's Challenge was a huge success, with many youth from around the world submitting their great GMW selfies in the spirit of financial awareness! Get involved in this year's social media challenge and show us how you are celebrating the week!

Link the following hastags with your photo:
#GMW2017 #GMWSelfie #GlobalMoneyWeek

GMW MONEY BOX CHALLENGE

Piggy banks and money banks have been around for thousands of years, helping young people to save in many different shapes and sizes! Do you save? What does your money box look like? Join us in the social media My Money Box Challenge and share how you save with other young people across the world!

GMW VIDEO CHALLENGE

Calling all filmmakers and budding videographers! GMW Video Challenge gives the chance for you to share the activities taking place in your school, community and workplace with the world – whether it's a music video, vlog, interview, or your own creative idea. Lights, camera, action!

STOCK EXCHANGES RING AROUND THE WORLD

As part of the GMW tradition, Stock Exchanges around the world will launch the GMW celebrations by inviting children and youth to ring their stock exchange bell! Ring Around the World kick-starts the global celebrations for the Week of financial education, inclusion, and livelihood awareness.

44 Stock Exchanges celebrated and took part in last year's GMW, and we are planning for the bell to ring louder than ever during 2017!

VISITS TO MONEY MUSEUMS

Visits to money museums offer young people a great opportunity to draw on the past – learn about the history of money – to understand the importance of saving for their futures. GMW is a brilliant platform to share with others how you engage children and youth in your community to learn about money.

VISITS TO PARLIAMENTS

A valuable way to educate and engage youth in economic citizenship is to actively involve them in decision-making. Organizing youth visits to government departments (such as the Ministry of Finance or the Ministry of Education) and including them in activities such as participatory budgeting fosters understanding of how policies are made, and the impact these decisions have.

VISITS TO BUSINESSES

Student visits to business branches or head offices support learning about how different departments work, which kind of jobs employees do and which skills are needed. These visits are a great opportunity for youth to learn lessons about creating livelihoods, such as entrepreneurship tips and what it takes to be a good employer and/or employee.

SUGGESTIONS FOR YOUR ACTIVITIES

Read more: www.globalmoneyweek.org 'Events' section



BANKS, BANKING ASSOCIATIONS AND MICROFINANCE INSTITUTIONS

👍 Plan an Open Day for students at bank branches
Student groups can visit your bank branches or headquarters, to get to know more about how banks work, which different departments and job positions are available, and what they do.

👍 Visits to schools and universities
Organize visits to schools and universities to hold lectures on money history, money management and/or introduce their roles and responsibilities within the financial system. This way youth can learn more about how these institutions work and ask the questions they are curious about.

👍 Savings campaign
Hold a savings campaign where children and youth can visit local branches to open their first savings accounts in an easy, fast and secure manner.

👍 Job shadow activity
Organize a job shadow activity, and provide students with a mentorship and work experience opportunity - this would showcase the Bank offices, and help to motivate students to pursue financial careers through first-hand experience.



👍 Organize drawing, photo or essay competitions
Launch drawing, photo and essay competitions around creative themes like: 'My dream money', 'My dream bank', 'My money tree with dreams', 'Why is it important to save?', 'What are you saving for?', 'Learn.Save.Earn.' 'If I were an entrepreneur, which business I would own?', 'My dream job in the future' or 'My business idea.'



👍 Hold a financial education 'tour'
Send cars or buses to visit places with lots of children and youth, like parks and shopping malls. The cars or buses can have learning facilities to teach youngsters about money and savings, such as computers with financial games, books, and brochures.

👍 Support young entrepreneurs
Welcome young entrepreneurs to pitch their business ideas to you or present their businesses!

EXAMPLE CASE STUDY

MasterCard Worldwide in GMW2015

To celebrate GMW2015, MasterCard announced their participation in a series of activities to raise awareness for child and youth financial inclusion. On March 16th, Director of MasterCard Global Philanthropy – accompanied CYFI at the Ye! EU Launch & Pitching Event in Brussels at the European Economic and Social Committee.

The activity was followed by a web conference organized by Smart Consumer, MasterCard's financial education program and CYFI. The online conference was joined by The Solidarity and Social Investment Fund (FOSIS), a service of the Chilean Government; and Ramón, an economist and young entrepreneur from Colombia. The objective of this initiative was to discuss how to manage your money responsibly and the different challenges and opportunities to become young entrepreneurs in Latin America.

EXAMPLE CASE STUDY

Kuwait International Bank (KIB) in GMW2016

The Kuwait International Bank arranged a number of field visits to various schools, institutes, universities and civil society institutions to cultivate financial literacy and offered lectures and workshops to explain the importance of saving for future. In addition, some students were invited to a field trip to its head office, to an orientation tour of the head office's financial hall and to a visit of its branches and call center. Additionally, the bank visited many schools during the Week where the financial institute supported activities and events in the schools.



INSURANCE COMPANY

👍 Plan an Open Day for students at your company

Student groups can visit your company to get to know more about how insurance companies work, and familiarize them with the concept of insurance.

👍 Visits to schools and universities

Organize visits to schools and universities to hold lectures on money history, money management and/or introduce their roles and responsibilities within the financial system.

👍 'Insurance 101' workshop

Hold an 'Insurance 101' workshop at a local community center, school, or library to provide youth with basic definitions and offer an interactive 'insurance match' session where they can link real-life scenarios to different policies, so they can understand the role that insurance plays in savings and security.

STOCK EXCHANGES

Last year 44 stock exchanges around the world participated in GMW2016. We welcome you to take part in the **'Ring Around the World'** initiative, by inviting children and youth to ring the opening stock exchange bell at your stock exchange, to celebrate this week of financial education, inclusion and livelihood awareness.



We would like to encourage stock exchanges with its members, and its employees to get directly involved and organize events in your local communities during the Week.

👍 'Ring the bell' ceremony to open/ close the day

Invite schools, universities and youth groups to visit your stock exchange so that they can learn about money, careers, business and entrepreneurship. They would have the opportunity to ring the opening or closing bell, which signals the beginning or end of the day's trade, in honor of Global Money Week.

EXAMPLE CASE STUDY

Brazil's Stock Exchange BM&F BOVESPA welcomed students in GMW2016

During GMW2016 in Brazil, students visited the Brazil's stock exchange, BM&F BOVESPA. While at the stock exchange, they learned how the financial markets function and as well as the role of stock exchanges within financial systems. Additionally, students learned about banking products and services, and the importance of saving for the future by using formal financial services. The visit also included insightful stories about BM&F BOVESPA, its history and future and how it became one of the world's largest stock exchanges and the biggest in Latin America.



EXAMPLE CASE STUDY

Stock Exchange of Thailand (SET) welcomed children in GMW2016

For GMW2016 the Stock Exchange of Thailand (SET) participated for the first time, preparing and carrying out activities at the Investory Investment Discovery Museum and the Maruey Knowledge & Resource Center. One of the activities included an interactive self-discovery museum called INVESTORY whose goal is to inspire children to learn about financial planning and investment, how to earn, save, spend, invest, and build awareness. The second activity organized by the SET in the Maruey Library called "Capital Market Living Library" was targeted to people from all backgrounds: investors, securities practitioners, and the general public. The overarching aim of the activity was to encourage all visitors to start saving, recommending some financial planning books, and building awareness of GMW.

👍 Tip! Get involved in CYFI's SchoolBank initiative to deliver financial services to children and youth!

The program uses innovative distribution channels and technology with the goal of financially empowering children and youth in a cost efficient and sustainable way.

For more information about SchoolBank visit:
www.childfinanceinternational.org/projects/schoolbank

TIPS FOR PLANNING YOUR GMW EVENT

Read more:  www.globalmoneyweek.org 'Media' section

If you would like to plan an event during GMW, this section provides a guide to help plan your activities!

- Step 1 CREATE A PLANNING TEAM
- Step 2 CHOOSE AN EVENT
- Step 3 PLAN THE EVENT
- Step 4 PROMOTE THE EVENT
- Step 5 HOST THE EVENT
- Step 6 SHARE YOUR EXPERIENCE

TIPS FOR PLANNING YOUR GMW EVENT!


- Don't forget to add GMW to your annual event calendar!
- Contact your affiliated institutions, businesses, sponsors, and schools to inform them about the Week, and get them involved in GMW celebrations.
- Take fun photos and videos with GMW logos and share them with CYFI Team. GMW logos are downloadable here:  www.globalmoneyweek.org 'Resources' section
- Get inspired by earlier GMW celebrations, by reading GMW Reports published in 2016, 2015, 2014 and 2013. You can find these reports here:  www.globalmoneyweek.org 'Resources' section



HOW TO WORK WITH THE MEDIA?


Through media coverage you can promote the important work you are doing in your community, expand the reach of your message, and spread the word about GMW2017!


- **Identify the story you want to tell** – before you begin developing media outreach materials, consider your goals in gaining media coverage and define the focus you want to have in your activities.
- **Communicate your message effectively** – be prepared to tell your story and respond to questions. All media outreach materials should be clear, concise and persuasive, with a core set of messages.
- **Create media outreach materials** – different types of materials are used for different media outlets; create a live-read radio script for on-air announcements about your event, prepare a ready-made blog post article, or use the press release included in our press pack as an example of outreach material for printed publications.
- **Create a media list for contact** – contact media outlets and reporters directly to let them know about your GMW activities. Be strategic and pick those who are most likely to cover your event, and send tailored outreach materials by email to these reporters and outlets.
- **Prepare a media kit for journalists** – include all media materials you have prepared as a background to your business, organization or institution, your event, and Global Money Week. Media kits can be handed out before or during your event, or to those who are unable to attend but have responded to media outreach efforts.


 **Tip!** Keep in mind 'pitch points' when creating any outreach materials; the three or four most compelling points to share that will make someone want to learn more about your event, about GMW2017, and about the Child and Youth Finance Movement.


SUGGESTIONS FOR SOCIAL MEDIA

Social networking sites can reach a large audience with little or no cost – use existing accounts, or ask colleagues, partners and volunteers to promote the event through personal profiles.


 **Facebook:** create an event and send invitations to your network, share information and status updates with others. Use the search facility to find other local GMW events and Facebook users with shared interests.

 **Twitter:** short updates or 'tweets' can be used for positive messages, calls for action, or to highlight key information about your event. Using hashtags (key phrases starting with '#') such as #GMW2017, #GlobalMoneyWeek, and #LearnSaveEarn, makes it easy for Twitter users to search for information about events locally and to connect with the global celebrations.

 **Tip!** Remember to update your Facebook and Twitter statuses regularly, and cross-promote all of your social media content!

 **YouTube:** upload videos to YouTube to promote, inform, and educate about your event – include the link to your YouTube video or channel in Facebook updates and Tweets, and embed videos on your website.

 **Instagram:** take photos or videos at your GMW event and share them on your Instagram account. Use GMW hashtags #GlobalMoneyWeek #GMW2017 #LearnSaveEarn, but you could also add the most popular hashtags to get more exposure to your post, e.g. #instagood #photooftheday #picoftheday #like4like #likeforlike #smile #fun #instadaily #like #amazing #bestoftheday #instamood. Instagram is a great platform to link and share your post across Facebook, Twitter, Tumblr or Flickr.

 **Bloggers:** contact a blogger in your local area who writes about community news or events, and ask them to publicize your GMW activities – be sure to give them clear and compelling information about your event.

HELPFUL GMW MATERIALS

Read more: www.globalmoneyweek.org 'Resources' section

Check out helpful materials that help you either plan your GMW celebrations or help you promote the Week. In this section you will find suggestions for the materials that you might find helpful:

GMW REPORTS 2016, 2015, 2014 AND 2013

CYFI has published 4 GMW reports in 2016, 2015, 2014 and 2013. These will provide you with an overview of activities and events that took place in different countries around the world. They are full of fantastic ideas of how children, youth and their communities have celebrated GMWs.

GMW BROCHURE

A two pager that you can use in events prior to the GMW2017 so you can promote the Week and raise awareness about it!

GMW CLASSROOM MATERIALS

Holding sessions as part of the classroom activity is a beneficial way for students to get a better overview of managing money wisely - budgeting, investing, spending, earning money, and developing entrepreneurial skills.

GLOBAL MONEY WEEK LOGOS

Don't forget to take fun photos with GMW Logos! Also, you can use these logos in documents, publications, videos and other promotional materials, such as on t-shirts, caps, scarves, umbrellas, pens, pencils, notepads, etc.

GMW TOOLKITS

Guidebooks that can help you plan your GMW events and celebrations in your community. Toolkits provide an overview of the potential activities you can organize to ensure that children and youth in your country participate and learn more about finance and entrepreneurship!

The complete series of Toolkits has been prepared for:
• Government institutions • Corporate companies • SMEs & entrepreneurs • Financial institutions • Universities, students & alumni • Teachers & schools • Parents & guardians • Money museums • Civil society • Youth

THE PRINT PACK: PRINTABLE PROMOTIONAL RESOURCES

The **Print Pack** is an additional document to Toolkits, it will help you manage the promotional process of your GMW2017 event. The Print Pack consists of the following:

1 Example Checklist for Global Money Week

This checklist is to help you keep track of the deadlines so you can be sure to enjoy your successful GMW2017 celebrations!

2 Example press release for reaching out to the media

Contact with local media is one of the best ways to promote your event and spread awareness within your local community about GMW2017.

A press release should include information about your event, as well as basic information about GMW, and your organization. In addition to contacting the press, try reaching out to other media outlets such as broadcast media and local newspapers. This template press release should be adapted to fit your own GMW activities. Remember to specify the exact dates, locations, and numbers of children reached, and please share it with us at the CYFI Team as well.

3 Example letter for contacting other organizations

Visiting parliaments, banks, stock exchanges, and other institutions is an excellent way for children to learn how

these institutions operate. You may send a template letter to request a visit or an educational talk.

4 Example Certificate of Participation

This is a template certificate for you to hand out to your event's participants to thank them for taking part in your Global Money Week activities.

5 Example printable Speech Bubbles: "I save because..." and "The best thing about Global Money Week is..."

This is a printable template for you to print out and to give to children, youth, your colleagues, your family and friends, your next-door neighbors, strangers on the street (the list goes on!) to fill in with a marker and to pose for a photograph. If you are working with a large group you may want to laminate a couple of speech bubbles to be filled out with dry erase makers for multiple uses.

6 Example Evaluation form for children & youth

You can share this form with the children and youth taking part in your GMW activities in your community. It is a great way to ask for a feedback and improve your event for the next year!



CONNECT WITH THE CYFI TEAM

CHILD & YOUTH FINANCE INTERNATIONAL (CYFI)

CYFI is a global system change organization working with partners in 132 countries. We have taken on the challenge of ensuring that everyone works together to reshape financial systems in order to economically and socially empower children and youth worldwide.

Stay connected with us:

✓ www.childfinanceinternational.org

f ChildFinance

t @ChildFinance

📖 Read our publications: www.childfinanceinternational.org/movement/publications

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1 GLOBAL MONEY WEEK (GMW)

GMW is a global celebration, initiated by CYFI, with local and regional events and activities aimed at inspiring children and youth to learn about money, saving, creating livelihoods, gaining employment and becoming an entrepreneur.

✓ www.globalmoneyweek.org

f GlobalMoneyWeek t @GlobalMoneyWeek

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2 YE! FOR YOUNG ENTREPRENEURS

Ye! - initiated by CYFI - is an online platform for young entrepreneurs between 16 and 30 years old. Ye! connects young entrepreneurs around the world and provides them with business knowledge, an online community, a coaching program and links to funding opportunities to help them grow their ventures.

✓ www.yecomunity.com

f Ye Community t @ye_community

Interested in what a Ye! Pitching Event is like? Checkout the video here: www.yecomunity.com/en/funding

3 SCHOOLBANK

SchoolBank, initiated by CYFI, aims to create the next generation of economic citizens through quality financial, social and livelihoods education (Economic Citizenship Education) and accessible child & youth friendly banking services. The program uses innovative distribution channels and technology with the goal of financially empowering children and youth in a cost efficient and sustainable way. SchoolBank creates the savers of the future by:

- Teaching children and youth why and how to save and how to generate income
- Enabling children and youth to put their knowledge into practice in the safe environment of their school
- Where possible, offering innovative banking technology to children and youth

Read more: ✓ www.childfinanceinternational.org/projects/schoolbank



Initiated by Child & Youth Finance International

