



Tasks for State & Local Coalition

Local Level

- Organize campaigns making contacts and plans for coordination at the local level. At least one coordinator from each local group will be a member of the state coalition.
- Survey local financial institutions and identify appropriate savings products.
- Identify and recruit motivational speakers and financial coaches.
- Maintain a list of financial coaches and coordinate contacts at the local level, but share the list with the state coalition for recognition.
- Organize motivational meetings.
- Coordinate followup and identify and promote local financial education support activities (Many agents are teaming with financial professionals using the FDIC Money Smart curriculum.)
- Develop local funds and support for campaigns.

State Level

- Make one brochure for the state and a template for local information and contacts to be printed on an insert in the state brochure.
- Have a statewide motivational speakers list so that groups can share regionally.
- Train motivational speakers on a state or regional basis depending on demand. (A question arose as to whether there might be a video made that could be used in conjunction with the motivational meetings.)
- Train the financial coaches on a regional basis using teams of county agents and financial professionals.
- Coordinate sharing of best practices.
- Coordinate a statewide conference annually.
- Prepare promotional materials to be adapted for local campaigns.
- Coordinate statewide funding.