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@MassFinEdCollab #MFECSummit

THE MASSACHUSETTS FINANCIAL EDUCATION COLLABORATIVE Presents the

5th FINANCIAL EDUCATION SUMMIT

Showing Results & Telling Your Story

Federal Reserve Bank of Boston
Tuesday, October 29, 2013
8:00am—3:30pm
# Today’s Program

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00—3:00</td>
<td>Visit the MFEC Map Room &amp; Resource Room</td>
<td>3rd Floor—AV Lounge</td>
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<tr>
<td></td>
<td>Location Map – show us where you’re located</td>
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<td>Resource materials table</td>
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<td>Membership sign up</td>
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<tr>
<td></td>
<td>Pick up registration packet</td>
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<td></td>
<td>**Raffle: Leave your business card to enter our many raffle prizes.</td>
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<tr>
<td>8:30—9:00</td>
<td>Breakfast and Registration</td>
<td>3rd Floor—AV Lounge</td>
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<tr>
<td>9:00—10:45</td>
<td>Opening Plenary</td>
<td>4th Floor Connolly Center</td>
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<td></td>
<td>Welcome &amp; Introductions—Doreen Treacy</td>
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<td></td>
<td>Recognition of retired Steering Committee member,</td>
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<td>Scott Guild, Federal Reserve Bank of Boston</td>
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<td>- Jamie Eldridge, State Senator</td>
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<td></td>
<td>- Richard Walker, SVP and Community Affairs Officer, Federal Reserve Bank of Boston</td>
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<td>Networking &amp; Polling Activities summary</td>
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<td></td>
<td>Summit Social Networking Bingo</td>
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<td></td>
<td>A Real Life Success Story: Meet Francia Peguero</td>
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<tr>
<td></td>
<td>Text Polling and Table Discussion I</td>
<td></td>
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<tr>
<td></td>
<td>Federal Reserve Bank of Boston panel: Using Data to Strengthen Programs</td>
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<tr>
<td></td>
<td>Text Polling and Table Discussion II</td>
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<tr>
<td></td>
<td>Morning Raffles**</td>
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<tr>
<td>10:55—11:35</td>
<td>Concurrent Morning Session A</td>
<td>3rd Floor—AV Rooms</td>
</tr>
<tr>
<td></td>
<td>Select 1 of 3 Sessions or visit the Credit for Life fair, p. 6</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Session A details, pp. 8—9</td>
<td></td>
</tr>
</tbody>
</table>

**Raffle winners must be present to win.

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# Thank You to Our Wonderful Volunteers!

Michele Mitsumori, Volunteer Coordinator
Marcos Elugardo, Technical Coordinator
Jermaine Hamilton
Tom Fletcher (US Wealth)
Anahit Tokatlyan (MIDAS staff)
Shira Tiffany (MIDAS staff)
Helen Pimentel (Boston Private)
Martha Vedrine (MIDAS intern)
Gosia Tomaszewska (MIDAS staff)
Satori Bailey, CWU
Mukta Joshi
Kevin Connors, Boston Private
Diane Carolan (Boston Private)

Sarah Durfey
Ariel Fusaro
Golnaz Tabatabai
David Linhart
Shima Baronian
Kasey Webb
Kathy Moorey (Cape Cod Five)
Ernie Rogers (Cape Cod Five)
Toni Anderson (Cape Cod Five)
Mairead Graf (Cape Cod Five)
Bob Walsh (Cape Cod Five)
Les Olson (Boston Private)

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# Thank you to our raffle prize contributors:

Financial Planners Association
RTN Federal Credit Union
Cape Cod Five Cents Savings Bank
Credit Union Center
Doreen Treacy, MCBC
2013 MFEC 5th FINANCIAL EDUCATION SUMMIT

2013 MFEC MEMBERSHIP MEETING
3:00PM—3:30PM
THE CONNOLLY ROOM

Margaret Miley, MFEC Steering Committee Chair
John Napolitano, MFEC Steering Committee Vice Chair

Agenda:
- Introduce Current Steering Committee Members
- History of MFEC & the Steering Committee
- Duties of Steering Committee Members
- Category of Members
- Nomination Process
- Deadline for Nominations

Drawing for winner of iPad!

John Napolitano (left) and Dan Galli (right) from the Financial Planners Association present Michelle Giario an iPad as part of our membership meeting raffle in 2012.

Be part of something great. Become a member of the Massachusetts Financial Education Collaborative today and learn the true meaning of collaboration!

Today’s Program

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:45</td>
<td>Lunch Activities</td>
</tr>
<tr>
<td>11:45 – 11:50</td>
<td>4th Floor Connolly Center</td>
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<tr>
<td>11:55 – 12:35</td>
<td>OPTION A: CONNOLLY CENTER</td>
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<tr>
<td>11:55 – 12:35</td>
<td>OPTION B: NEW ENGLAND RM</td>
</tr>
<tr>
<td>12:35</td>
<td>Afternoon Instructions and Lunch Raffles</td>
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<tr>
<td>12:50 – 1:30</td>
<td>Concurrent Afternoon Session B</td>
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<tr>
<td>1:40 – 2:20</td>
<td>Concurrent Afternoon Session C</td>
</tr>
<tr>
<td>2:30 – 2:55</td>
<td>Closing Plenary</td>
</tr>
<tr>
<td>3:00 — 3:30</td>
<td>MFEC Annual Member Meeting</td>
</tr>
</tbody>
</table>

Today’s Program
## 2013 MFEC 5th FINANCIAL EDUCATION SUMMIT

### BREAKOUT SESSIONS

<table>
<thead>
<tr>
<th>Concurrent Sessions</th>
<th>Evaluating Learning Impact</th>
<th>New Ways to Deliver Old Information</th>
</tr>
</thead>
</table>
| **Morning Session A** 10:55—11:35 | Outcomes of Financial Educator Collaboration  
MFEC Summit Pioneers  
3rd Floor AV-4 | Fiscal Health Vital Signs!  
Midas Master Financial Coach  
3rd Floor AV-1 |
| **Moderator** | Kerri McLaughlin  
RTN Credit Union | **Moderator**  
Doreen Treacy  
MCBC |
| **Afternoon Session B** 12:50 – 1:30 | Gateway City Pilot Program: Financial Literacy in Our High Schools  
Pilot Partners  
3rd Floor AV-1 | Financial Entertainment—Applications In the Workplace  
Doorways 2 Dreams |
| **Moderator** | Carol Lach  
DESE (retired) | **Moderator**  
Jonas Parker  
D2D |
| **Afternoon Session C** 1:40– 2:20 | Matching Evaluation Activities to Programs  
Federal Reserve Bank Of Boston  
3rd Floor AV-3 | How to Make Learning Stick—Behavioral Economics  
3rd Floor AV-1 |
| **Moderator** | Dawn Hicks  
Federal Reserve Bank of Boston | **Moderator**  
Margaret Miley  
Midas |

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### AFTERNOON SESSION C—1:40—2:20 (Continued)

#### Incorporating Participant Values into Program Design
Join the discussion on the importance and impact of connecting with your audience by honoring and incorporating their values into the process. Hear perspectives on one on one coaching and group education program development.

**Presenters:** Arisleyda Veloz, Dir of Asset Development, Lawrence CommunityWorks & Matt Paradise, Education & Development Team Lead & Trainer, American Consumer Credit Counseling

**Moderator:** Kerri McLaughlin, Education & Financial Literacy Coordinator – RTN Federal Credit Union

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Don’t miss out on some great raffle prizes at the Closing Plenary session right after these workshops!
Matching Evaluation Activities to Program Model States
The purpose of this workshop is to promote an understanding of different evaluation activities and the importance of matching information needs and program model stages to activities. I will provide an overview of the five-tiered evaluation approach, describe what is meant by different program model stages and conduct an activity where the participants will need to think about their model stage and map it onto a visual display that I would create, discuss their information needs, and finally draw out the implications for what it means in terms of the evaluation activity that fits with their information needs and model stage.

Presenter: Sarah Savage, Senior Evaluation and Learning Specialist, Federal Reserve Bank of Boston

Moderator: Dawn Hicks, Sr. Community Affairs Analyst, Federal Reserve Bank of Boston

How to Make Learning Stick—Behavioral Economics & Financial Security
What is the link between financial information and changes in financial habits? How do you know your financial education will be implemented? Come join us for a discussion of recent research in “behavioral economics” in which we will explore ways to fashion financial education for the best long term results for participants.

Presenter: Margaret Miley
You are 25 and just starting out on your career. Can you budget your life? Can you afford to live by yourself or do you need a roommate? Maybe you need to live in your parent’s basement? Can you afford food? A car? Come play the role of a high school senior that goes through a Credit for Life Fair. Find out where fairs are planned this academic year and how you can volunteer or visit a fair. This is all about paying it forward to other schools and interested parties. We’ll show you how.

Presenter: Cape Cod Five Cents Savings Bank
Moderators: Pat Walsh, VP, Training & Development Manager & Kathy Moorey, Financial Education Officer

played the award-winning suite of games 275,000 times, generating over 90,000 thousand hours of financial education. This session will showcase a partnership with Staples, in which D2D created a customized version of Bite Club, the vampire retirement planning game, to prompt Staples employees to take real world financial action at certain points throughout gameplay.

“Staples” Bite Club won the 2013 EIFLE award from the Institute for Financial Literacy for Instructional Game of the Year.

Presenter: Winfred Fields, Innovative Strategist, D2D Fund
Moderator: Jonas Parker, Ph. D., Manager of Operations and Special Projects, D2D Fund

Supporting Elders in Avoiding Financial Exploitation (3rd Floor AV-3)
Elders need education on protecting their finances. In this workshop, we will discuss common ways that elders and others fall prey to scammers. Come learn and share techniques to assist our elders and vulnerable clients maintain their financial health.

Presenter: Cheryl Cannon, Statewide Coordinator, Massachusetts Money Management Program
Moderator: Jacqueline Cooper, Financial Education Associates
Gateway City Pilot Program: Financial Literacy in Our High Schools  (3rd Floor AV-1)

The state funded grants to 11 high schools in 10 Gateway Cities for pilot programs to equip high school students with the knowledge and skills necessary to become self-supporting and make critical decisions regarding personal finance. The presenters of this session will describe the components of the programs in three of these high schools, William Dean Technical High School (Holyoke), Putnam Vocational Technical High School (Springfield) and Lynn Classical High School. A discussion of the collaborative partnerships, resources, and steps necessary for implementation will be included. This session will also focus on important insights gained and measures of the impacts on the financial literacy of the students involved. Attendees will participate by listing important considerations for design of a program that they might include in their own pilot.

**Presenters:** Jennifer Connolly, President, Junior Achievement of Western Massachusetts & Niaz Karim, President, Valmo Villages

**Moderator:** Carol Lach, Retired, Massachusetts Department of Elementary and Secondary Education

Financial Entertainment: Applications In the Workplace  
(3rd Floor AV-4)

Financial Entertainment (FE) uses the immersive quality of casual video games to teach important financial education lessons and build consumer financial capability. D2D has designed, developed, and launched six Financial Entertainment game titles, each with its own financial learning objectives. Through an array of distribution partnerships in the military, government, financial services, community colleges and grass roots organizations, over 350,000 visitors have
Outcomes of Financial Educator Collaboration (3rd Floor AV-4)
At this interactive panel, hear firsthand about experiences, triumphs and challenges encountered by the MFEC Summit Pioneers. Join the discussion to learn about their experiences with Logic Models, Outcome Assessments and the evolution of this collaborative group.

Presenters:
Joel Schwartz, Executive Director—Moving from Debt to Assets
Jacqueline Cooper, Principal—Financial Education Associates
Arisleyda Veloz, Dir of Asset Development—Lawrence Community Works
Michael Ibanez, Financial Coach
Matt Paradise, Education & Development Team Lead & Trainer—ACCC
Satori Bailey, Mobility Mentoring & Specialty Services Coordinator—Crittenton Women’s Union

Moderator:
Kerri McLaughlin, Education & Financial Literacy Coordinator—RTN Federal Credit Union

Fiscal Health Vital Signs: Getting to the Heart of Financial Wellness (3rd Floor AV-1)
Get your finger on the pulse of innovative ways to approach and support financial health and wellness. Hear from the creator of the “Fiscal Health Vital Signs” (FHVS) to get to the heart of the matter on how the tool was conceived and exercise your mind learning about the Midas Collaborative’s new Financial Coaching Program, which is using FHVS, along with remote technologies, to better reach and support Massachusetts residents in improving their fiscal health! Join us for this interactive and inspiring session, it will be sure to generate new ideas while improving your circulation all around!

Presenters:
Susan Wolfson, Master Financial Coach
Doreen Treacy, MCBC

Supported by:
Aida Franquiz, VP, Community Investment Officer, Boston Private Bank & Trust Company

BE SURE TO NETWORK AND COMPLETE YOUR BINGO CARD
DIAGONAL, ACROSS, OR DOWN.
THEN PLACE THE BINGO CARD IN A YELLOW BINGO BOX FOR FABULOUS RAFFLE PRIZES!