

## Agenda

FEPPP Education Committee

Jan 18, 2017

4:00 pm

Review of Minutes from Nov. 15, 2016 meeting

Update on curriculum reviews including guidance from the executive committee

Review of final financial fellows application (attached)

Revision of DRAFT scoring rubric for financial fellows application (attached)

Update on crosswalk committee

Minutes Education Committee  
Nov. 15, 2016

Attendees

Ann Acosta, Amanda McNaughton, Brenda Leighty, Carol Coe, Charles Collier, Shannon Gedo, Kyle Nielsen, Lyn Peters, Jessica Van Son, Pam Whalley, Tracy Godat

The minutes from Oct. 18, 2016 were reviewed and accepted

It was noted that Lyn, Kyle, Pam, Charles agreed to serve on the curriculum review committee. Materials will be sent out for review in the next few weeks. Only three completed applications were found on the FEPPP curriculum submission page.

The roll out timeline was discussed. Tracy indicated that she will send the timeline with details prior to the next meeting.

The Financial Fellows application was approved for distribution.

The meeting ended at 4:21 pm.

## FEPPP Financial Fellows Program

### Program Details:

**What:** Following an intensive two-day training you will be required to share what you have learned with your peers by making a one to three hour presentation to teachers within your district, or conducting a more formal training (either a conference presentation, a half-day workshop, or a full-day workshop). Half and full day trainings will be conducted with a partner Financial Fellow and a FEPPP mentor. You will be compensated for the formal trainings.

**When:** Two-day training will be held March 14 and 15, 2017 from 9 am to 4 pm each day.

**Where:** Seattle Area - location to be determined.

Participants in the Financial Fellows Mentor training Program will receive:

1. Up to \$220 a day in sub pay for two days of training
2. Two nights hotel accommodations(arranged by FEPPP)
3. Meals (one dinner, two breakfasts, two lunches) at the training
4. Travel expenses reimbursement for educators from Eastern Washington (\$300 per person for Spokane area teachers; \$100 per person for Yakima/Tri-City participants. Car pooling is STRONGLY encouraged where possible)
5. Curriculum.
6. Ten free clock hours
7. Opportunity to serve as a Mentor/Trainer for the FEPPP

### Participant Responsibilities

Participants will be required to commit to:

1. Presenting a 1-3 hour program for a minimum of 20 peers in their home districts, where they will introduce their peers to the curriculum (this presentation may be made at the school or district level);
2. co-presenting either
  - a. an after school, half-day (elementary), full-day (middle and high school) teacher training workshop under the direct tutelage of the FEPPP as funds are available. Fellows will be expected to initiate and maintain post workshop contact with the teachers who attend the workshops they conduct, and to serve as expert resources and information conduits. FEPPP will be responsible for workshop expenses, recruitment, administration, and the design and interpretation of evaluation instruments. Presenters compensation will include
    - an honorarium of \$300 (after school or half day elementary workshop) or \$500 (full day middle and high school workshop)

· up to \$220 in sub pay.

**b. A conference session for Washington k-12 educators under the direction of FEPPP. The conference presentations would ideally be made by educators who are active in the hosting organizations. This could include conferences hosted by DECA, Future Business Leaders of America, Vocational/Technical groups, and WALA members. Fellows presenting at conferences will be expected to serve as official liaisons with the various educational groups, promoting financial education within each group while simultaneously acting as an information source. FEPPP will help arrange for the conference presentation, provide materials, and provide presenters with an honorarium of \$200 for their presentation provided equivalent honorariums are NOT paid by the conference organization.**

**3. Serving as advocates for financial education within their communities including responding to local media as requested.**

**4. Initiating and maintaining electronic contact with all of their teachers.**

**5. Attending quarterly phone meetings of the fellows for the duration of your term.**

**Please note: the application requires a letter of recommendation from a school or district level administrator committing to providing a venue for you to make a minimum one hour presentation based on the curriculum that you will receive with at<**

## 1. Financial Fellows Application

Name

Home Address

School Name

School Address

School District

ESD

County

Percent Free and  
Reduced Price Lunch

Email Address

Repeat Email Address

Languages Spoken

## 2. Teaching Responsibilities

Subjects

Courses

Grade Levels

## 3. Do you have experience working with diverse populations?

Yes

No

If your answer to this question is yes, please specify the populations and the extent of your experience.

4. Are you currently a(n)

- Classroom teacher.
- Curriculum director, coordinator, or specialist.
- Learning specialist, coach or fellow.
- Staff member at an ESD.
- Other (please specify)

5. Do you have prior experience as a(n)

- Classroom teacher.
- Curriculum director, coordinator, or specialist.
- Learning specialist, coach or fellow.
- Staff member at an ESD.
- Other (please specify)

6. Do you have any experience in teaching personal finance to kindergarten to 12th grade students?

- Yes
- No

If your answer is yes, please describe your experience below.

7. Please indicate below which, if any, Financial Education Public Private Partnership training you attended.

- Bellingham (June 2009)
- Spokane (June, 2010)
- Auburn (February, 2011 at JA Finance Park)
- Vancouver (June, 2011)
- Clover Park (Feb., 2015)
- Yakima (June, 2012, JA World)
- Everett (Feb., 2013)
- Renton (June, 2013)
- Spokane (Feb, 2014)
- Masters training--Bremerton (June, 2014)
- Vancouver (August, 2014)
- Advanced Materials Training--Spokane (Sept. 2014)
- Auburn (k-5) --JA Finance Park (Feb. 2015)
- Auburn (6-12) --JA Finance Park (Feb. 2015)
- Advanced Materials Training--Renton (March, 2015)
- Masters training--Spokane (June, 2015)
- Everett (Feb., 2016)
- Advanced Materials Training--Everett (March, 2016)
- Masters training--Bellevue (August, 2016)

8. Have you ever participated in a personal finance training run by another organization?

- Yes
- No

If your answer to this question was yes, please list the course(s) title(s), sponsoring organization(s) and training(s) length below.

9. Have you completed a college level course focused primarily on personal finance?

- Yes
- No
- If your answer to this question was yes please list the course title(s) below.

10. Do you have any experience in teacher training?

Yes

No

If your answer is yes, please describe your experience below



11. Please indicate which (if any) of the following professional organizations you are affiliated.

	Yes, I Am A Member	No, I Am Not A Member	Yes, I've Attended A State Conference	No, I Have Not Attended A State Conference
ACTE (Association for Career and Technical Education)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WA FACSE (Washington Family and Consumer Sciences Educators)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WALA (Washington Association of Learning Alternatives)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Washington Applied Mathematics Council	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Washington DECA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Washington Future Business Leaders of America	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Washington State Business Educator Association	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Washington State Council for the Social Studies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other (please list below)

12. Would you be willing to schedule and present a 1-3 hour session on personal finance at any of the conferences listed in your answer to #6 that you normally attend?

Yes

No

13. Does your district currently offer personal financial education to its students?

Yes

No

14. If your answer to the previous question is yes, please check the appropriate category below.

As a required stand  
alone class

As an elective stand  
alone class

Integrated within a  
required class(es).  
Please list course(s) in  
the textbox below

Integrated within an  
elective class(es).  
Please list course(s) in  
the textbox below.

Please list course(s) here and specify if it is a required or an elective class:

15. Would your district/school be open to hosting an in-service teacher training on personal finance?

Yes

No

16. Why do you want to become a FEPPP Financial Fellow?

17. I certify that I am available on the listed dates and times, in their entirety, for this committee.

Yes

No

18. I certify that I have permission from my supervisor(s) to attend the committee on the listed dates and times.

Yes

No

Please submit this application plus a letter of recommendation from your principal or district administrator to [FEPPP@k12.wa.us](mailto:FEPPP@k12.wa.us). In this letter, the principal or district administrator must explicitly commit to providing a venue for you to make a presentation (minimum length of one hour) based on the curriculum that you will receive at the fellows training to at least 20 teachers in your school or district.

19. Typing your full name below certifies your responsibilities under this program (contained in the following section) and agree to fulfill them.

### Financial Fellows Responsibilities

**2017 Financial Education Standards Crosswalk Committee**

Response ID Number: \_\_\_\_\_ Date: \_\_\_\_\_

Committee 1st Choice: \_\_\_\_\_ 2nd Choice: \_\_\_\_\_ 3rd Choice: \_\_\_\_\_

Scorer 1: \_\_\_\_/\_\_\_\_/\_\_\_\_ Scorer 2: \_\_\_\_/\_\_\_\_/\_\_\_\_ Scorer 3: \_\_\_\_/\_\_\_\_/\_\_\_\_

**Application Score Summary**

Application Section	Points Possible	Points Awarded			Scoring Comments
		#1	#2	#3	
Personal Information	Must be complete	n/a			First Name: _____ Last Name: _____
Work Information <i>Question 1</i>	Must be complete	n/a			ESD: District:
Foreign language skills <i>Question 1</i>	1				Languages: _____ _____
Teaching Responsibilities <i>Question 2</i>	Must be complete	n/a			Subjects:  Courses:  Grade Levels:
Experience with Diverse Populations <i>Question 3</i>	2				Yes = +1 Complete experience = +1
2015–16 A Current Assignment/Position <i>Question 4</i>	4				Score Highest: <ul style="list-style-type: none"> <li>• Classroom Teacher = +4</li> <li>• Curriculum director, coordinator, or specialist =</li> <li>• Learning Specialist/Coach/Fellow = +3</li> <li>• ESD staff/Higher Ed (HS) = +2</li> <li>• Other _____</li> </ul>
2015–16 Prior Experience/Position <i>Question 5</i>	4				Score Highest: <ul style="list-style-type: none"> <li>• Classroom Teacher = +4</li> <li>• Curriculum director, coordinator, or specialist =</li> <li>• Learning Specialist/Coach/Fellow = +3</li> <li>• ESD staff/Higher Ed (HS) = +2</li> <li>• Other _____</li> </ul>
Experience Teaching Personal Finance <i>Question 6</i>	6				Experience 0 – 5 years = +1 Experience over 5 years = +2 Depth of Experience (whole course, subject units, limited number standalone lessons) = 1 to 3
Training in Personal Finance <i>Questions 7, 8, and 9</i>	8				Attendance at FEPPP novice training = +2 Attendance at FEPPP master training = +2 Attendance at financial training from other organization = up to 2 pts, depending on sponsoring organization College course = +2

**2017 Financial Education Standards Crosswalk Committee**

Response ID Number: \_\_\_\_\_ Date: \_\_\_\_\_

Committee 1st Choice: \_\_\_\_\_ 2nd Choice: \_\_\_\_\_ 3rd Choice: \_\_\_\_\_

Scorer 1: \_\_\_\_/\_\_\_\_/\_\_\_\_ Scorer 2: \_\_\_\_/\_\_\_\_/\_\_\_\_ Scorer 3: \_\_\_\_/\_\_\_\_/\_\_\_\_

<p><b>Experience in teacher training</b> <i>Question 10</i></p>	<p>4</p>				<p>Subjective.</p>
<p><b>Professional Organization Affiliation and willingness to speak</b> <i>Questions 11 and 12</i></p>	<p>1</p>				<p>Professional Organization(s):</p> <p>Willing to present: +1</p>
<p><b>Why do you want to be a FEPPP Fellow?</b></p>	<p>5</p>				<p>Subjective</p>
<p><b>Other observations</b></p>					
<p><b>Certification and Administrator Statements</b></p>	<p>Must be complete</p>	<p>n/a</p>			<p>All "Yes"s?: Yes No (Circle One)</p> <p>Follow up email/call if any "No"s</p>