



## Preparation Checklist for Money Sense Lesson Delivery

### Guidelines

This preparation checklist is meant as a continuing resource for volunteers to deliver effective, impactful lessons to students. We developed this checklist with input from experienced volunteers so that you can enhance your lesson delivery skills and hear advice for strong student engagement.

The preparation checklist and links below should act like a classroom “toolbox”. The preparation checklist on the left-hand side takes about 5 minutes to finish. After each checklist section, feel free to review videos and resources on the right-hand side of this document from our staff and some of our most skilled volunteers. On behalf of our staff, educators and students – thank you for taking these steps to make the most of your classroom time!

**Note:** The preparation checklist and resource links work best after you’ve completed Online Training. To complete Online Training: [sign in](#) to the SecureFutures Volunteer Portal and click the link in the left-hand menu for “Online Training”. You can revisit Online Training at any time by going through the link and steps above.

### 1. Preparation

To prepare to deliver lessons, I ...	I’m good to go	I’d like to improve this	Links to Online Training resources
<ul style="list-style-type: none"> <li>• <b>review Instructor Notes</b> for ideas and key points</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Online/print materials (note: access/print out before watching to the videos below)</b> <ul style="list-style-type: none"> <li>• <a href="#">Volunteer Instructor Notes</a></li> <li>• <a href="#">Student Workbooks</a></li> <li>• <a href="#">Prezi Presentations</a></li> <li>• <a href="#">Surveys</a></li> </ul> <b>Program Logistics</b> <ul style="list-style-type: none"> <li>• <a href="#">Video Overview</a> <ul style="list-style-type: none"> <li>◦ <a href="#">Transcript</a></li> </ul> </li> </ul> <b>Videos of Lesson Overviews</b> <ul style="list-style-type: none"> <li>• <a href="#">Bank Your Future</a></li> <li>• <a href="#">Check It Out</a></li> <li>• <a href="#">To Your Credit</a></li> </ul>
<ul style="list-style-type: none"> <li>• <b>identify stories</b> to illustrate a concept</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>create questions</b> to drive engagement</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>open the Prezi presentation.</b> Review the presentation and get a feel for the presentation’s design and flow</li> <li>• <b>review all materials</b> including student surveys, handouts and activities</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>contact the teacher</b> ahead my lesson date. I introduce myself to the teacher and make inquiries about things like classroom “personality”, available equipment, bringing small “incentives” to give to students, etc.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>identify “call to action” questions</b> that I can ask students prior to conclusion of each lesson</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	

## 2. Build Rapport

To build rapport with students, I ...	I'm good to go	I'd like to improve this	Links to Online Training resources
<ul style="list-style-type: none"> <li>• <b>arrive early and greet students</b> as they enter</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<p><b>Online/print materials (note: access/print out before watching to the videos below)</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Volunteer Instructor Notes</a></li> <li>• <a href="#">Student Workbooks</a></li> <li>• <a href="#">Prezi Presentations</a></li> </ul> <p><b>Getting Started</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Video Overview</a> <ul style="list-style-type: none"> <li>○ <a href="#">Transcript</a></li> </ul> </li> </ul> <p><b>Classroom Engagement &amp; Cultural Competency</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Video Overview</a> <ul style="list-style-type: none"> <li>○ <a href="#">Transcript</a></li> </ul> </li> <li>• <a href="#">Cultural Competency Self-Study Guide</a></li> <li>• <a href="#">Cultural Competency Resources</a> (pg. 5-11)</li> </ul> <p><b>Videos of Classroom Best Practices</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Stories</a></li> <li>• <a href="#">Examples</a></li> <li>• <a href="#">Tips</a></li> </ul>
<ul style="list-style-type: none"> <li>• <b>use student names</b> (and ask for pronunciation when necessary)</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>set guidelines</b> for listening and participation</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>incorporate incentives</b> for active participation (<i>optional</i>)</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• clearly explain why and how to <b>complete the pre-survey</b></li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>grab their attention</b> in the first few minutes with an interesting opening. Stress why you feel it's important to learn about financial concepts. What's in it for them? Why does this matter?</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	

### 3. Delivery

When delivering lessons, I...	I'm good to go	I'd like to improve this	Links to Online Training resources
<ul style="list-style-type: none"> <li>• <b>frequently ask students questions</b>, especially when moving to a new concept</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<p><b>Online/print materials (note: access/print out before watching to the videos below)</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Volunteer Instructor Notes</a></li> <li>• <a href="#">Student Workbooks</a></li> <li>• <a href="#">Prezi Presentations</a></li> </ul> <p><b>Classroom Engagement &amp; Cultural Competency</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Video Overview</a> <ul style="list-style-type: none"> <li>◦ <a href="#">Transcript</a></li> </ul> </li> <li>• <a href="#">Cultural Competency Self-Study Guide</a></li> <li>• <a href="#">Cultural Competency Resources</a> (pg. 5-11)</li> </ul> <p><b>Videos of Lesson Overviews</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Bank Your Future</a></li> <li>• <a href="#">Check It Out</a></li> <li>• <a href="#">To Your Credit</a></li> </ul> <p><b>Videos of Classroom Best Practices</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Stories</a></li> <li>• <a href="#">Examples</a></li> <li>• <a href="#">Tips</a></li> </ul>
<ul style="list-style-type: none"> <li>• <b>use stories and personal experiences</b> to illustrate points in an interesting way</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>ask students to share</b> their experiences with specific financial issues.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>focus on the key points</b> outlined in the instructor notes (think <i>quality</i> versus <i>quantity</i> of content)</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>present with spontaneity</b> rather than just reading from the slides</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>invite the teacher</b> to participate with stories, in activities and by providing feedback after lessons.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	

## 4. Activities

When incorporating activities, I...	I'm good to go	I'd like to improve this	Links to Online Training resources
<ul style="list-style-type: none"> <li>• <b>provide clear instructions</b> and get students started by illustrating the first step in the activity</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<p><b>Online/print materials (note: access/print out before watching to the videos below)</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Volunteer Instructor Notes</a></li> <li>• <a href="#">Student Workbooks</a></li> <li>• <a href="#">Prezi Presentations</a></li> </ul> <p><b>Classroom Engagement</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Video Overview</a> <ul style="list-style-type: none"> <li>◦ <a href="#">Transcript</a></li> </ul> </li> </ul> <p><b>Videos of Classroom Best Practices</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Stories</a></li> <li>• <a href="#">Examples</a></li> <li>• <a href="#">Tips</a></li> </ul>
<ul style="list-style-type: none"> <li>• <b>walk the room</b> and observe students, providing assistance as needed</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>ask students to share</b> responses versus telling them the answers</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>provide recognition</b> for student input and completion of the activity</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	

## 5. Verbal and Nonverbal Communication

When communicating with students, I...	I'm good to go	I'd like to improve this	Links to Online Training resources
<ul style="list-style-type: none"> <li>• <b>speak at a volume</b> level that fills the room</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<p><b>Classroom Engagement</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Video Overview</a> <ul style="list-style-type: none"> <li>◦ <a href="#">Transcript</a></li> </ul> </li> </ul> <p><b>Videos of Classroom Best Practices</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Stories</a></li> <li>• <a href="#">Examples</a></li> <li>• <a href="#">Tips</a></li> </ul>
<ul style="list-style-type: none"> <li>• <b>speak at a good pace</b> and don't rush</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>use inflections</b> to stress a keyword or point</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>avoid artificial fillers</b> ("um", "you know", "like")</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>maintain good eye contact</b> with the class as a whole, as well as individual students</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• smile and <b>show enthusiasm</b> and that I care and want to be in this classroom</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	