

# Country Staff Guide

to using the



## Financial Literacy Programme

Media Toolkit



A head for business. A heart for the world.™

## Introduction

SIFE has built a reputation as a leading international organization that brings together the leaders of today and tomorrow to create a better, more sustainable world through the positive power of business. The leadership and guidance you offer teams make significant impact in the success of the SIFE program, and your efforts are greatly appreciated.

Since 2005 one of the organization's most generous global donors, HSBC, has offered university students around the world the opportunity to educate others about financial literacy. As part of the HSBC Financial Literacy Programme, SIFE teams in more than 20 countries have been able to apply for a grant ranging from US\$250 to US\$1,000 to help fund projects, to be completed between January and July, that would create economic opportunity by helping others develop the personal financial management skills necessary to achieve financial independence.

In this guide, we have outlined guidelines and tips that will support your efforts to achieve national media attention spotlighting the efforts of teams across your country in their HSBC Financial Literacy Programme endeavors. The guide is meant to be used in conjunction with the HSBC Financial Literacy Programme Media Toolkit that was distributed to all SIFE teams participating to assist them in generating media stories that raise awareness of SIFE and student outreach efforts. The toolkit is available online at [www.sife.org/hsbcliteracyprogramme/marketing\\_tools.asp](http://www.sife.org/hsbcliteracyprogramme/marketing_tools.asp).

The Media Toolkit includes advice regarding how to:

- Develop press releases
- Prepare for interviews
- Prepare collateral materials
- Merchandise media clips
- How-to advice for interacting with the media
- Templates to prepare effective press releases quickly and easily
- Trademark and logo usage guidelines

SIFE teams and country leaders should see themselves as ambassadors of SIFE, and the messages you communicate to the public should be accurate and uphold its integrity. By utilizing these tools, you can help teams convey messages in a professional and consistent manner while preserving the reputation of the SIFE brand. The success of our collective media strategies depends on everyone adhering to these guidelines.

While these tools are a good source of information and guidance, it is not intended to replace personal advice that is always available by contacting Chelly Bennett at SIFE World Headquarters via phone at +1 417-831-9505 or email [cbennett@sife.org](mailto:cbennett@sife.org).

You can generate exceptional awareness of the outreach efforts of your SIFE students nationwide to increase financial literacy, and collectively we can increase awareness of SIFE worldwide.

## Secure National Media Attention

These steps will lead you on your way to secure national publicity for the HSBC Financial Literacy Programme, and can easily be modified and utilized to interact with members of the press to gain national attention throughout the year for significant news about the SIFE program in your country.

### 1. Set a Goal

**Your overall goal is to secure a national media story that draws attention to SIFE teams' participation in the HSBC Financial Literacy Programme;** however, a very important step in this process is to determine your intended outcome and audience. For instance, you may want to address one or all of the following:

- Create awareness about the outreach efforts of the teams
- Attract business leaders who might contribute time or money
- Attract the interest of other colleges and universities to the SIFE program

Use these desired outcomes as guidelines to determine which media targets to pursue. For example, if you wish to get your message to executive-level readers/viewers, you may choose a national business publication or business television program to propose a story.

### 2. Create a Media Database

Now that you have in mind your target audience(s), determine the key media outlets you wish to approach. Quality is more important than quantity. Follow the guidelines in the Media Toolkit on page 9 to prepare your list.

- Make a phone call to the individual reporter or producer to confirm that you have identified the correct person. You can locate most telephone numbers and many e-mail addresses via the Internet by looking for the editorial or production staff of the particular publication or program. When you reach your contact, make a brief introduction about your interest in developing a relationship to be a *resource* for upcoming stories. Briefly describe SIFE, the HSBC Financial Literacy Programme and your role. Invite the reporter to call on you as a resource for upcoming stories and ask if you may submit story ideas occasionally. Offer to send or e-mail a short summary to them. Inquire what method they prefer to receive information (e-mail, mail or fax).
- Follow up with an e-mail, or mail a packet that consists of the following:
  - Cover letter introducing yourself and explaining the HSBC Financial Literacy Programme objectives, including a sentence or two about your story idea (if you have an immediate story idea)
  - HSBC Fact Sheet
  - SIFE Fact Sheet
  - A one-page proposal of your story idea (if you have one)

### 3. Create a great story proposal

Just like successful SIFE programs, a successful story proposal or “pitch” might center on one great project/team, or the cumulative strength of several projects/teams.

You can e-mail faculty advisors from around the country and request that they send you a one-paragraph summary about their anticipated project plans. From this information you can determine which ones might merit national attention.

It often helps to select a theme or trend that is of national importance. A problem/solution approach is a good way to present your pitch. Here are a few examples to get you started:

#### **Pitch A: The power of teams country-wide making a positive impact on financial literacy**

This story is a general one regarding how, as part of a global effort by university students, “x” number of SIFE teams across your country are helping people achieve financial independence by helping them develop personal financial management skills through the HSBC Financial Literacy Programme.

Audience: General consumer population

Media: Morning news shows, Features section in newspapers, radio talk shows, financial websites

Problem: Lack of financial literacy (define what constitutes financial literacy and contact appropriate agencies/research for statistics)

Solution: Describe several outreach efforts and explain HSBC Financial Literacy Programme

Notes: Use key points such as:  
*This year more than 360 grant applications representing more than 20 countries were submitted from around the world, offering a wide range of ideas to teach financial literacy. Country specific numbers of participating teams in your country.*

#### **Pitch B: National Problem/Solution**

Audience: General consumer population

Media: National morning news shows, features section in newspapers, radio talk shows, financial websites

Problem: Challenging economic times

Solution: Describe how SIFE teams are teaching people to save money and spend wisely during difficult economic times.

**Pitch C:  
National Problem/Solution targeting a  
specific audience and more narrow  
media**

Audience: College students and new credit card users, parents

Media: National collegiate magazine, national newspaper education or money/financial section, national magazine money/financial section

Problem: Lack of understanding of how to use credit cards wisely; too many credit cards being issued to young people

Solution: SIFE team members are helping raise awareness about how to use credit cards wisely.

**Pitch D:  
Specific Problem/Solution (focus on  
one exceptional project that solves a  
problem)**

Audience: General consumer population

Media: Feature section in national newspaper, feature for news program or talk show (include student guests), radio interview program

Problem: (example) Unskilled workers in small village don't understand financial basics to run small businesses.

Solution: SIFE students educate workers about basic accounting, budgeting, loans, pricing, saving and profitability.

In summary, your pitch/proposal should be brief and descriptive. You should offer facts/statistics and resources including interviews with yourself, a local HSBC representative, possibly a team member and/or faculty advisor, and perhaps someone who has been helped by the project.

### **Other targeted national media opportunities:**

Keep in mind that there are many national media opportunities for niche audiences. For instance, the HSBC Financial Literacy Programme has special focus on several groups including:

- Preschool, primary and elementary children ages 3-11
- Middle school youth ages 12-15
- High school young adults ages 16-18
- Adults and university students ages 19-15
- Adults ages 26-59
- Senior adults age 60+
- Entrepreneurs
- Women Entrepreneurs

You may find success by focusing your story on a particular category and targeting specialized media such as a women's magazine, children's magazine, national education newspaper, newsletter or website.

### **Important Tips:**

- It is vital to always name SIFE and HSBC correctly, please utilize the fact sheets on pages 3 and 4 respectively from the Media Toolkit.
- Create a short list of two or three key points you want to make in any interview.
- Always maintain control of the story. If the reporter wishes to speak to a team member or faculty advisor, set up the interview and review the key points you want to make with the person who will be speaking to the reporter. Ask the reporter for a list of questions in advance (they won't always give them to you).