

INDIVIDUAL PROJECT/ PROGRAM/ EVENT:

Note: Any program since last year's deadline of March 15 is eligible.

Category: (Please circle or highlight the category for which this program is being submitted.)

- Women - Education - Community - International - Cultural - Diversity

Title: Understanding your Finances

Describe your project/ program/ event in **150-300 words**. Be sure to include:

- how the project addressed **AAUW's mission** (15 points)
- **branch goals** in doing this program (10 points)
- **specific action steps** in planning this program (15 points)
- involvement of **other community groups** (if any) (10 points)
- **number of members** (5 points) and **nonmembers** (5 points) **in planning and in putting on the program**
- steps taken for **community visibility** (10 points)
- **number of members** (5 points) and **nonmembers** (5 points) who attended or benefited
- **number of new members** who joined (if any) (5 points)
- measurable **impact on the community** (10 points)
- **lessons learned** for future programs/ projects/ events (5 points)

As part of its work for educational equity in the area of finance, the North Shore branch has planned a panel discussion at the NYIT campus on March 19, 2009. The branch has become acutely aware of the lack of financial knowledge among its members as they are faced with widowhood, pension choices, 401(k)s, IRAs, annuities, long-term care choices, reverse mortgages and a variety of investment instruments. Students, as well, require more information about finance as they enter the employment market and must make decisions about 401(k)s, IRAs, etc. at first jobs.

Over the past year, members of Long Island Women & Girls, Women on the Job, professors and staff of NYIT, representatives from Wachovia Securities, Nancy Mion (Past President, NYS AAUW), and several members of our branch coordinated efforts to create a panel of knowledgeable experts in the field. They publicized this event through AAUW newsletters, campus newsletters, announcements at campus events, local newspapers, the Newsday community bulletin board online, flyers and posters. Groups were encouraged to provide flyers to local libraries and community groups (see attached flyer).

We hope to attract 75 or more attendees from the AAUW membership, local college campuses, and the public, as this is a very timely topic in these financially difficult times.

A financial and investment needs assessment survey will be provided to attendees. Future programming and follow-up will be based upon the information gathered from this survey.

Attach copies of newsletter and newspaper articles about this project/ program/ event.

(No more than 4 pages maximum)

Mail or email the original of your entire application with supporting materials to:

- Peggy Kelland, AAUW-NYS Program Vice President
- 13 Susan Lane, Poughkeepsie, NY 12603

Questions? (845)297-0507



UNDERSTANDING YOUR FINANCES

Come join us !!!!!

Thursday, March 19, 2009

12:30 PM

**NYIT Harry Schure Lecture Hall
Northern Blvd, Old Westbury Campus**

Panel:

**Michele Devine, Wachovia Securities
Stephen Hartman, NYIT Business Dept.
Nancy Mion, AAUW
Anne Kehoe, Wachovia Securities**

Presented by:

NYIT & AAUW North Shore Branch

From: laura porsch <susieporshkar@yahoo.com>
To: smkell45@aol.com
Subject: Re: North Shore Branch Twenty First Century Awards Submission
Date: Mon, 23 Mar 2009 8:31 am

Dear Peggy,

Please find below the follow-up information you requested:

-1)45 people attended 2) lessons learned- Do Not schedule a conference during break week on a college campus (plenty of parking ,very few students) Nancy Mion gave an excellent review of AAUW research on equal pay andequal/fair pay legislation -but she was preaching to the choir 3) The steering committee scheduled for April will discuss plan follow-up to topics mentioned on the needs assessment form -dollar value, progress of fair pay act, "green" economy , and ways to keep in contact with non-members who signed the attendance sheet.

I hope this helpful . Laura Porsch **Mon, 3/16/09,**

< > wrote:

From: < >
Subject: Re: North Shore Branch Twenty First Century Awards Submission
To:
Date: Monday, March 16, 2009, 5:31 PM

Laura - "Understanding Your Finances" sounds very interesting. Since your Individual Project/Program is taking place this week, of course you could not include all the information requested. I anticipated this in setting the deadline of March 15, thus allowing for extra information on events close to or just after the deadline. Two other branches have similar situations.

Please send me an addendum to your application with the number who attended (members and nonmembers), impact on the community, and lessons learned for future events as soon after the presentation as possible. - Peggy Kelland

-----Original Message-----

From: laura porsch < >
To:
Sent: Mon, 16 Mar 2009 12:25 pm
Subject: Fw: North Shore Branch Twenty First Century Awards Submission

--- On **Sun, 3/8/09, laura porsch <susieporshkar@yahoo.com>** wrote:

From: laura porsch <susieporshkar@yahoo.com>
Subject: North Shore Branch Twenty First Century Awards Submission
To: smkell45@aol.com
Date: Sunday, March 8, 2009, 6:39 PM