



# **A Banking Program**

**Start Up Procedures**

by

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# School Banking Program

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## Overview

The Banking Program is a partnership that incorporates many skills. Students make important decisions requiring them to use various thinking skills. The program also models and teaches the importance of responsibility, accuracy and planning. Participating students learn banking both as an employee and as a customer. They learn the importance of saving, and how interest is accrued. Students use math, reading, writing and listening skills in a mock work environment. All students within a school may participate either as “bank employees” or as “customers”.

Any school with a bank as its business partner may easily participate. One class may run the program, or it may be a school wide project pulling students from a variety of classes and grade levels.

By following the simple procedures outlined in this booklet, you can reap the rewards of this enjoyable and educational program that brings together the talents of community, school and students.



## Glossary

The Bank	The commercial banking or savings institution with whom the school has a partnership.
Bank Liaison	The individual at the partner bank responsible for implementing the School Banking program.
School Bank Advisor	The person who will implement the School Bank. Generally this person is a classroom teacher but it is not essential that this be so.
School Bank	The group of students or class conducting the School Banking program



## Teacher Expectations for Students

Students participating in the Banking Program will:

- a. Have regular school attendance with no more than three (3) excused absences per year.
- b. Have regular banking attendance with no more than three (3) excused absences at all trainings, meetings, school banking days, and all “bank” functions.
- c. Pass all mathematics exams with 75% accuracy or higher. If 75% accuracy is not reached, remediation is required until the concepts being taught are understood. After remediation, the mathematics exam (or an equivalent exam) must be taken and a score of 75% or higher is mandatory.
- d. Turn in homework on time and completed neatly. The amount of homework allowed to be missed is determined by the teacher/school bank liaison.
- e. Learn the importance of being accurate in their schoolwork and in the banking program.
- f. Learn public relations and public speaking skills.
- g. Learn the importance of accountability.



## Partner Responsibilities

The bank partner will be responsible for the following:

- a. To supply a minimum of one (1) bank employee assigned to assist the teacher in the planning and implementation of the banking program for a minimum of one full school year.
- b. Host a minimum of three (3) half-day field trips to the bank where students can observe and be trained in banking procedures.
- c. Host a lunch for the banking students during each of the above field trips.
- d. Send a minimum of one (1) bank employee to assist the teacher with student interview and the selection of students.
- e. Provide prizes for two (2) bank sponsored school wide contests (essay and poster).
- f. Provide judges and display space at the bank for the above poster and essay contest entries. The purpose of the contest is to develop marking material to promote school awareness of the banking program and incorporates Language Arts curriculum in the Bank program.
- f. Work with the teacher to plan one (1) Family Night and host the event at the bank for students and parents.
- g. Host one school party for the banking students at the end of the school year. Year-end party may be at the school or at the bank.



## **School Responsibilities**

The school will:

- a. Initiate the Banking Program in discussion with the Bank partner.
- b. Identify a teacher who will plan and implement the banking program in partnership with the Bank Liaison.
- c. Promote Family Night to parents of students in the Banking Program.
- d. Offer the entire student population the opportunity to participate in the Banking Program as customers.
- e. Schedule time and location for students to participate in the Banking Program as employees and as customers.
- f. Schedule three (3) field trips to the Bank. School and bank liaisons will discuss and determine who will cover the cost of buses for the field trips.
- g. Initiate discussion with the bank liaison as to who will cover the cost of t-shirts other costs to be incurred during the year. T-shirts are essential, as they are the uniforms that identify the student bankers.
- h. Monitor student progress relating to bank and academic skills.

## **Bank Positions**

*President	one student
*Vice President	one student
*Secretary to the President	one student
*Secretary to the Vice President	one student
*Board of Directors	3 – 6 students
**Tellers	4 – 5 students
**Checkers	4 – 5 students
*Security Guards	3 – 5 students

\*These positions are crossed trained to provide back-up assistance in the event of student absence or customer overflow.

\*\*The number of Tellers must equal the number of Checkers. Both work as a team to insure accuracy and accountability.

The positions listed above may be increased to accommodate the number of students in the class with the exception of President, Vice President and the corresponding Secretarial positions. These positions will always remain at one each student per position.

# **Preeesenting...**





## **Job Descriptions**

### **Bank President**

1. Assume administrative responsibility including planning, management and operation of the School Bank in accordance with the rules and regulations of the School Board of Broward County, Florida.
2. Provide leadership for the School Bank under the supervision of the School Bank Advisor.
3. Preside over all meetings including those of the Board of Directors and the Teller and Checker meetings.
4. Attend training conducted by the School Bank Advisor and the Bank Liaison.
5. Attend a half-day training field trip to the Bank.
6. Perform other duties as may be assigned by the School Bank Advisor.

### **Secretary to the President**

1. Assist the President in assuming the administrative responsibility of the bank under the supervision of the President and the School Bank Advisor.
2. Attend training conducted by the School Bank Advisor and the Bank Liaison.
3. Be responsible for taking the Minutes at the Board of Directors meeting and/or at the Teller and Checker meetings.
4. Attend a half-day training field trip to the Bank.
5. Perform other duties as may be assigned by the Bank President or by the School Bank Advisor.



## **Job Descriptions**

### **Vice President**

1. Assume administrative responsibility of the School Bank in the absence of the President. Administrative responsibility includes the planning, management and operation of the School Bank in accordance with the rules and regulations of the School Board of Broward County, Florida.
2. Assist the President in providing leadership for the School Bank under the supervision of the School Bank Advisor.
3. Attend training conducted by the School Bank Advisor and Bank Liaison.
4. Presides over the Security Guard meetings. The Vice President may also responsible for presiding over the Teller and Checker meetings when assigned by the President.
5. Attend a half-day training field trip to the Bank.
6. Perform other duties as may be assigned by the President or the School Bank Advisor.

### **Secretary to the Vice President**

1. Assist the Vice President in assuming administrative responsibility of the bank under the supervision of the Vice President and School Bank Advisor.
2. Attend training conducted by the School Bank Advisor and the Bank Liaison.
3. Take minutes at the Security Guard meetings and/or the Teller and Checker meetings.
4. Attend a half-day training field trip to the Bank.
5. Perform other duties as may be assigned by the Vice President or the School Bank Advisor.



## Job Descriptions

### Board of Directors

1. Assist the President and Vice President in planning the monthly calendar and activities of the School Bank.
2. Attend training by the School Bank Advisor and the Bank Liaison.
3. Attend regular meetings held by the President and/or the School Bank Advisor.
4. Be cross-trained as a Teller and Checker and be prepared to assume the job on an as needed basis.
5. Assist in the production and promotion contests and activities run by the School Bank.
6. Attend a half-day training field trip to the Bank.
7. Perform other duties as may be assigned by the Vice President or the School Bank Advisor.



## **Job Descriptions**

### **Teller and Checker**

1. Responsible for making student deposits and for checking the accuracy of the deposits.
2. Responsible for balancing all deposits at the end of each banking day.
3. Attend training by the School Bank Advisor and the Bank Liaison.
4. Cross-trained as both a Teller and a Checker.
5. Assist in the production and promotion contests and activities run by the School Bank.
6. Attend a half-day training field trip to the Bank.
7. Perform other duties as may be assigned by the Vice President or the School Bank Advisor.



## **Job Descriptions**

### **Security Guard**

1. Responsible for escorting students to and from the bank.
2. Responsible for keeping the line orderly from the classroom to bank.
3. Attend training by the School Bank Advisor and the Bank Liaison.
4. Cross-trained as a Teller and Checker.
5. Have good customer relations with students, faculty and staff.
6. Attend regular Security Guard meetings held by the Vice President or President and/or the School Bank Advisor.
7. Attend a half-day training field trip to the Bank.
8. Perform other duties as assigned by the President, Vice President or School Bank Advisor.



## **Classroom Visitation Presentation Outline**

(Presentation to the class or classes involved in the School Banking Program)

**Presenters:**                      **School Bank Advisor**  
   **Bank Liaison**

**Presentation Time:**              **Approximately one (1) hour**

### **A. Overview of School Banking Program**

1. Why a School Banking Program?
2. Introduction of Bank Liaison, Partner In Education

### **B. Expectations for Student in the School Banking Program**

1. attendance
2. math
3. accuracy / concentration
4. accountability
5. good people skills
6. neatness

### **C. Student Bank Positions**

1. President (1 student)
  2. Vice President (1 student)
  3. Secretary to the President (1 student)
  4. Secretary to the Vice President (1 student)
  5. Board of Directors (3 – 6 students)
  6. Tellers (4 – 5 students)\*
  7. Checkers (4 – 5 students)\*
  8. Security Guards (3 – 5 students)
- \*The number of Tellers and Checkers must match.

### **D. Review Job Descriptions**

### **E. Application**

1. Review the Job Application Memo
2. Review Application

### **F. Interviewing Skills**

1. Discuss proper attire
2. Discuss interviewing techniques
  - a. Establish and maintain eye contact
  - b. Speak clearly
  - c. Use proper volume
  - d. Answer in complete sentences and with proper grammar
  - e. Shake hands before and after interview
  - f. Speak to the interviewers in clearly thought out responses

## **Classroom Visitation Presentation Outline**

### **Page 2**

3. Practice interviewing at home with a parent or guardian and in the mirror.
- G. Interview Questions**
1. Review probable interview questions
  2. Role play in class
- H. Review School Banking Program Time line**
- I. Review School Banking Day Procedures**
- J. Review School wide contest and Family Night co-sponsored by the School and the Bank, Partner In Education.**
- K. Review Bank responsibilities**
- L. Review Student Bank Meeting Agenda sample**



# Sample Student Employment Interview Questions Rating Sheet

Date: \_\_\_\_\_

Candidate's Name: \_\_\_\_\_

Rating Scale: 1 (low) through 10 (exceptional)

**Rating**      **Interview Questions**

---

- \_\_\_\_\_ 1. What Student Bank position would you most like?
- \_\_\_\_\_ 2. Why do you want to be (name position)?
- \_\_\_\_\_ 3. Can you describe what you think you will be doing should you be selected for (name position)?
- \_\_\_\_\_ 4. Do you know what "customer relations" is and why is it important?
- \_\_\_\_\_ 5. If selected, are you willing to keep this position throughout the entire school year?
- \_\_\_\_\_ 6. Are you willing to make up any work and notes you may miss in class?
- \_\_\_\_\_ 7. Why do you feel you are the best person for the job?
- \_\_\_\_\_ 8. Are you willing to keep a journal about what you learn during the banking program this year?
- \_\_\_\_\_ 9. If you are not able to get your first choice in a student bank position, what would be your second choice? \_\_\_\_\_

\_\_\_\_\_ **Total Score for Questions 1 – 9**  
(over)



**Rating Sheet**  
**Page 2**

**Optional Interview Questions for Student Bank President Candidates ONLY:**

Note: You may need to explain the question / guide the student as he/she responds.

\_\_\_\_\_ 10. If you were given the job of School Bank President, describe how you would lead the other bank employees to insure that all were working together as a team and talking with one another so that the School Bank would operate smoothly.

\_\_\_\_\_ 11. If you were given the job as School Bank President, describe what you think a typical school banking day would be like.

**General Comments**

\_\_\_\_\_ Student was dressed appropriately.

\_\_\_\_\_ Student shook hands upon entering and exiting interview.

\_\_\_\_\_ Student made appropriate eye contact and used appropriate body language and gestures.

**Overall Ratings:**

\_\_\_\_\_ **Total Score Questions 1 – 9**

\_\_\_\_\_ **Total Score Optional Questions 10 – 11**

\_\_\_\_\_ **Total General Comments**

\_\_\_\_\_ **Grand Total WITH Optional Questions 10 – 11**

\_\_\_\_\_ **Grand Total WITHOUT Optional Questions 10 – 11**

**Committee Signatures:**

**School Bank Advisor** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Bank Liaison:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Administrator Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

## Sample Job Application Memo

Date:

TO: Students  
School Banking Program

FROM: Your Name, Your Title  
Bank Partner's Name, Title, Bank Name

VIA: Name and Title of School Administrator

**SUBJECT: JOB APPLICATION PROCESS  
(YOUR SCHOOL) BANK**

The following Student Bank positions are available:

President (1 student)	Board of Directors (3 – 6 students)
Vice President (1 student)	Tellers (4 – 5 students)
Secretary to the President (1 student)	Checkers (4 – 5 students)
Secretary to the Vice President (1 student)	Security Guards (3 – 5 students)

All students must complete the attached Job Application. Please indicate which jobs you would most like to have. List your first choice by the number 1; your second choice by the number 2; and, your third choice by the number 3. You must indicate three choices or your Job Application will be returned and you will not be interviewed.

Job Applications must be completed and returned to (School Bank Advisor Name and Title) on or before (Month, Day, and Year).

Interviews will be held on (Month, Day, and Year) at (insert location and room). Job applicants must come appropriately dressed for the interview.

Candidates for the Student Bank positions will be interviewed by (insert name of Student Bank Coordinator, Bank Liaison and School Administrator). All interviews will last approximately ten (10) minutes.

Assignments will be announced on (insert name of your school's closed circuit TV station) on (Month, Day, and Year) and will be posted in the classroom.

# Sample Employment Application

## APPLICATION FOR EMPLOYMENT STUDENT BANK

Date

**PLEASE PRINT**

POSITIONS APPLIED FOR: (1) \_\_\_\_\_  
(2) \_\_\_\_\_  
(3) \_\_\_\_\_

NAME: \_\_\_\_\_  
Last First Middle

ADDRESS: \_\_\_\_\_  
Street City State Zip

TELEPHONE NUMBER: ( \_\_\_\_\_ ) \_\_\_\_\_  
Area Code Telephone Number

PLEASE CHECK ONE OR MORE OF THE FOLLOWING ON WHICH YOU HAVE EXPERIENCE:

- \_\_\_\_\_ Typewriter
- \_\_\_\_\_ Calculator
- \_\_\_\_\_ Computer NOTE: If yes, check which type of computer(s)
  - \_\_\_\_\_ Macintosh, Apple, I-Mac
  - \_\_\_\_\_ IBM or Equivalent PC

PLEASE CHECK ONE OR MORE OF THE FOLLOWING WORD PROCESSING PROGRAMS WITH WHICH YOU ARE FAMILIAR:

- \_\_\_\_\_ Microsoft Word/Microsoft Works
- \_\_\_\_\_ Claris Works or Apple Works
- \_\_\_\_\_ Note Pad
- \_\_\_\_\_ Other (Please list the other programs)  
\_\_\_\_\_  
\_\_\_\_\_

**Sample Employment Application**  
**Page 2**

PLEASE LIST ANY FOREIGN LANGUAGES THAT YOU KNOW: \_\_\_\_\_

\_\_\_\_\_

LIST ANY SPECIAL AWARD(S) OR CERTIFICATE(S) THAT YOU RECEIVED AND  
WHAT YOU DID TO RECEIVE THE AWARD(S) OR CERTIFICATE(S):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

SUMMARIZE ANY QUALIFICATIONS AND/OR CHARACTERISTICS THAT YOU HAVE  
THAT WILL QUALIFY YOU FOR THE POSITIONS FOR WHICH YOU APPLIED:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

STATE WHY YOU BELIEVE YOU ARE THE BEST PERSON FOR THE JOB: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**DATE RECEIVED:** \_\_\_\_\_

## **Student Interview Skills**

The School Bank Advisor and the Bank Liaison teach the following student interview skills. Each interview skills listed below must be explained and modeled for students participating in the School Bank project. All banking students should be given the opportunity to practice these skills by role playing in class using various scenarios. Students should also practice these skills at home with parents or other adults and in the mirror until they feel comfortable performing the skills.

Interview Skills:

### **Eye Contact**

Students learn to establish eye contact with the person or persons to whom they are speaking and meeting.

### **Voice Projection and Modulation**

Students practice speaking at proper volume and enunciating clearly.

### **Facial Expressions**

Students learn appropriate facial expressions when speaking.

### **Body Language**

Students learn appropriate body language, including hand gestures, while speaking.

### **Hand Shaking**

Students learn the importance of shaking hands and giving a personal acknowledgement of each person present at the start of the interview and again at the conclusion of the interview.

## School Banking Program Time line

**August (Date)**

### **Initial School - Partner Meeting**

Teacher, School Administrator and Bank Partners In Education discuss the Student Bank as a partnership learning activity.

**September (Date)**

### **Student Orientation**

School Bank Advisor and Bank Liaison present the idea to the class or group of students selected to participate in the Student Bank.

**September (Date)**

### **Parental Permission & Student Applications**

Letter sent to parents and job applications given to all students eligible to participate in the Student Bank.

**September (Date)**

### **Job Application Deadline.**

Job applications are turned in to the School Bank Advisor.

**September (Date)**

### **Student Interviews**

A half-day is scheduled. Interviewers are: School Bank Advisor, Bank Liaison and a School Administrator.

**September (Date)**

### **Applicants Notified**

Applicants are notified of their selection on school's closed circuit TV station and posted in the students' classroom(s).

**October (Date)**

### **Field Trip #1**

A half day field trip to the Bank with a working lunch for Student Bank Officers. Officers receive training by Bank personnel on their job functions and Bank operations. Officers are the following positions:

- President
- Vice President
- Secretary to the President
- Secretary to the Vice President
- Board of Directors

## School Banking Program Time line

### Page 2

**October (Date)**

#### **Field Trip #2**

A half day field trip to the Bank with a working lunch for Tellers and Checkers. They receive training by Bank personnel on their job functions and Bank operations.

**October (Date)**

#### **Field Trip #3**

A half-day field trip to the Bank with a working lunch for the Security Guards. They receive training by Bank Personnel on their job function as well as on the Teller and Checker positions.

**September or October (Date)**

#### **Board of Directors Meeting**

Board of Directors, President, Vice President and two Secretary positions meet to discuss the Student Bank Opening.

**October (Date)**

#### **Tellers and Checkers Meeting**

President, Secretary to President, Tellers and Checkers meet to discuss the Student Bank Opening.

**October (Date)**

#### **Security Guard Meeting**

Vice President, Secretary to the Vice President and Security Guards meet to discuss the Student Bank Opening.

**October (Date)**

#### **First School Bank Day**

School Bank Day is generally held the second week of each month in the Media Center or Cafeteria.

**October (Date)**

#### **Board of Directors Meeting**

Board meets to review School Bank Opening and begins planning school wide Banking Contest and Family Night. These events are co-sponsored by the School and the Bank.

**NOTE:**

**STUDENT BANK PERSONNEL MEET TWICE PER MONTH ON AN ON-GOING BASIS THROUGHOUT THE SCHOOL YEAR. AGENDA ARE SET BY THE STUDENT BANK PERSONNEL IN COORDINATION WITH THE SCHOOL BANK ADVISOR AND THE BANK LIAISON, WHEN APPROPRIATE.**

## Field Trip Procedure

1. Three (3) field trips to the Bank are planned and need to be arranged by late September or early October after all the interviews are completed and student job placements are made. The field trips are a half-day in length and should include lunch provided by the Bank.
2. Students must have a signed field trip form prior to the trip to the Bank. Parents should be notified that the field trip is a part of the School Bank Program when they give permission for the student to participate.
3. Participants in each of the three half-day field trips are divided by job functions:  
Day #1            President, Vice President, Secretary to the President, Secretary to the Vice President, Board of Directors  
  
Day #2            Tellers and Checkers  
  
Day #3            Security Guards
4. Each half-day field trip will consist of hands-on demonstrations and practical experience for each of the banking students. Students will learn firsthand how a bank operates and how each job at the bank is performed. Each banking student will be given a chance to shadow appropriate bank employees. Students will also be given a brief overview of the workings of a bank and be given a chance to ask questions during lunch. Students will be required to maintain a journal in which they will record their experience and what they learned during the field trip to the Bank.



## School Banking Day Procedure

1. School Banking Day is held at the school usually in the Media Center or in the Cafeteria one day per month. What day of the week the School Banking Program is to operate should be decided in conjunction with the Bank Liaison. School Banking Days generally are held in the morning and last approximately 30 – 45 minutes depending on the number of students banking and the number of students operating as Tellers and Checkers.
2. On the morning of School Banking Day, Tellers and Checkers proceed to the pre-arranged banking location and prepare the room to operate as the Student Bank. This may require arranging tables and chairs, and creating space for the customers to line up in front of each Teller/Checker position. The following will be needed at each School Banking Day:
  - 3 – 4 Tables (any shape)
  - 6 – 8 Chairs (two per table/student size)
  - 3 – 4 Hand-held calculators
  - 3 – 4 Adding machines with tape (supplied by the Bank)
  - 3 – 4 Moneybags (supplied by the Bank)
  - 6 – 8 Pencils (supplied by the School Bank Advisor)
  - Banking signs (made by the Board of Directors)
3. Each table represents a Teller's Window. Each Teller Window will have one Teller and one Checker who work as a team.
4. The Security Guards are responsible for keeping the Student Bank customer lines orderly. One student is allowed at the Teller Window at a time. Security Guards also escort younger students (Kindergarten and First Grade) to and from the Student Bank location.
5. Main Office staff, using the PA system, call students to the Student Bank by grade level. Communication between the Student Bank and the Main Office is maintained by the School Bank Advisory through the walkie-talkie. Grade levels are called to the Student Bank when the previous grade level has returned to their class.
6. The School Bank Advisor and the Bank Liaison must circulate during School Bank Day to troubleshoot any problems the Tellers and Checkers may be experiencing; answer questions that arise and, in general insure the safety of students and accuracy of the day's deposits.
7. When the last class has completed their deposits, the Student Bank is closed. The Tellers and Checkers must now balance out their cash drawers. Balancing out is supervised by the Bank Liaison to insure that all money is accounted for and placed in the proper student accounts. This procedure was taught to all banking students by the Bank Liaison during the half-day training.

## **School Banking Day Procedure**

### **Page 2**

8. When all Teller drawers are balanced, the bank is closed and the Bank Liaison returns to work to deposit the funds in the actual student accounts. Security Guards, Tellers and Checkers put all the equipment and supplies away and return the room to its original configuration.
9. All Student Bank personnel record the experience in their journals. Student Bank personnel return to class.
10. Regular Student Bank meetings are held twice a month. Either the President or the Vice President presides at the meetings and the corresponding Secretary of the presiding officer records minutes of all meetings. Minutes are filed in the student journals. See page 29 for a sample meeting agenda.

## **Student Savings Accounts**

The Bank Liaison will determine whether student savings accounts can be opened at the school or if they must be opened at the Bank facility. In either case, posters and articles in the School Newsletter must announce where, when and how new student accounts are opened.

If it is determined that Bank policy allows for new accounts to be opened at the school, it is recommended that students be given the opportunity to open new accounts once each semester. Announcements should be made to students and parents through school wide posters made by the Student Bank participants and through the school newsletter. Announcements should be made at least two weeks prior to the day that accounts are to be opened.

The Bank Liaison will determine the best time of day and day of the week to open new savings accounts as Bank staff will need to be present.

Newsletter articles and all posters should include the day, time and location for new accounts to be opened. They should also include the documentation that will be needed to open an account. For example, most Banks require a social security number and the signature of a parent or guardian. The Bank Liaison will provide the school with the requirements and forms to be completed.

## **School wide Contests and Family Night Activity**

The school and Bank sponsor contests and Family Nights. Student Bank employees coordinate these events in conjunction with the Student Bank Advisor and Bank Liaison. Contests and Family Nights can be held at any time that is good for the school and the Bank.

The following are suggested ideas for the Contest and Family Night activities:

### **Contests**

#### **Primary Grades (K – 2)**

At the Primary level, students may be asked “Whose face would you put on a \$100 bill and why?” They may also be asked to draw a \$100 bill and paste that person’s face on the money. The Bank partner may display the student projects.

#### **Intermediate Grades (3 – 6)**

At the Intermediate level, students may be asked to participate in an essay contest. For example, students may be asked, “If you could put anyone’s face on a \$100 bill, whose would it be and why would you choose that person?”

#### **Judging and Prizes**

The Bank employees should be responsible for judging contests and awarding prizes. Prizes for the above listed Contests can be Savings Bonds donated by the Partner, gift certificates or various other awards or trophies donated by the Bank. Winners of any contests should be announced on the school’s closed circuit TV and in the Newsletter

### **Family Night**

Family Night should be held at the Bank with whom you are working. At Family Night, faculty, staff, students and parents should be invited to visit the Bank and learn how a bank is run. Refreshments should be served. The Partner may wish to hire entertainment for the students. Partner’s facility should be decorated by the School Banking Students and student work should be displayed. This may be an opportunity to display the Contest run in conjunction with the School Banking Program. A Mini-Art Festival or Academic Fair may be held in conjunction with Family Night.

## Sample Student Bank Meeting Agenda

**Name of School**  
**School Banking Program Meeting**  
**Day of Week, Month, Date, Year**  
**Time of Meeting**  
**AGENDA**

- I. Meeting called to order by the President of the Board
  - A. Self-Introductions
  - B. Welcome
  
- II. Minutes of the prior meeting approved
  
- III. Student Accounts
  - A. Incentives for students to open accounts
  - B. Marketing the start of School Banking Program
  - C. Time line for start-up
  - D. Costs involved in start-up
  
- IV. School Banking Process
  - A. Legal issues and procedures of the Bank, Partner In Education
  - B. When and how often should the School Bank be open
  
- V. Advertising
  - A. Amount needed per month
  - B. How much notice do students need before Student Banking Days
  - C. Assign Advertising as an ongoing task
  
- VI. Banking Uniform
  - A. Develop ideas for a logo or T-shirt
    1. Assign; hold contest; give to an art class
  - B. Timeframe for ordering
    1. Contact the Partner In Education for vendor recommendations, cost perimeters
    2. Contact vendors for time line, cost estimates, color choices
  
- VII. Cross Training
  - A. Should all Board of Directors be cross-trained in Teller/Checker jobs duties
  - B. When would cross-training take place
  - C. Who would cross-train
  
- VIII. Contest
  - A. Discuss topic of contest at each grade level contest
  - B. Decide whether essay or poster

1. Primary
2. Intermediate
- B. Time line
- C. Rules
- D. Recognition/Prizes
  1. Ask Partner to sponsor
  2. What prizes
  3. What levels; how many
  4. How are they presented
  5. Will they be displayed
- IX. School Bank Vice President remarks
- X. Student Bank President remarks
- XI. Student Bank Board remarks
- XII. Questions and Answer session
- XIII. Meeting Adjourned – note time