30/20/2 Reference and User Services Association (RUSA) Projects Smart Investing @Your Library Grant Files, 2006-2016

<u>Box 1:</u>

Program Administration from 2007 to 2016 All Programs Program Descriptions, c.2015 State Libraries Background & Initiatives, 2011, 2016 Number of Programs, 2014-15 **Board Reports** ALA Advisory Committee, 2007-14 RUSA Board Reports, 2007-15 Timelines (I, II, III) Expansion, 2009, 2013 American Library Association and Financial Industry Regulatory Authority (FINRA) Transition, 2015-16 ALA Continuation, 2013-15 Robert Drake Contact, c. 2012 Publications Meeting the Need for Library-based Financial Literacy Education articles, 2015 Library Journal Movers, 2011 Public Libraries, 2012 Library Champions, 2013 American Libraries Article, 2013 Extension Journal, 2013 State of America's Libraries, 2012 Searcher Article, 2009 ASAE Award, 2009 ALA Annual Reports, 2012-14 Communications Plan and Report Video Invitation, 2013 Website Upgrade, 2014 Communication Plan, 2011-13 Media Training Guide, c. 2011 Librarian Training Initiative Design Team Members and Tasks, 2014 6 Fun & Easy Programs, 2014 Model Programs, 2011, 2014 Marketing Plan and Focus Group, 2013-14 Chicago Meeting – March 28, 2014 Library Training Initiative, Knowledge Acquisition #2 & Knowledge Transfer, 2014 Library Training Institute Webinars #3 Knowledge Acquisition & Knowledge Transfer, 2014 Participant Survey Summary and Responses, 2014

Evaluation – Online, c. 2014 **Conference** Presentations San Francisco Program Content, 2015 Indianapolis Program, 2014 Program in Las Vegas, 2014 Presentation ALA Chicago, 2013 Alabama Program, 2013 Anaheim Program, 2012 ALA Conference Proposals PLA, 2012 ASEC Presentation, 2010 Public Library Association National Conference Planning, 2011-12 Annual Conference Connect/Dates (RUSA), 2010-12 Smart Investing@Your library Grantee Seminar Binder Philadelphia, PA, January 24, 2014 Chicago, IL, January 20, 2015 Program Evaluation and Training Manuals Grantee Training Evaluation, 2012 Fast Fact Surveys Fast Fact Surveys Reports, 2012 FF Survey Responses Reports, 2010-2011 Fast Fact Surveys Forms, 2011 Focus Groups, 2011-13 **Evaluation Reports** Evaluation Report, 2014 Survey Monkey & Site Evaluations, 2011 Supplemental Data Form, 2012 Site Evaluation IV, 2011-12 Site Evaluations V, 2013 Box 2: Evaluation Report, 2013 Evaluation Report & Site Evaluations Evaluation Report, 2012 Site Evaluations, 2010-12 Site Evaluations, 2009-11 Evaluation Report, 2009-11 Pilot Project Evaluation Pilot Project Evaluation, 2007-09 Evaluation Process, 2007-11 Site Evaluations Pilot Project, 2007-10 Smart Investing@Your library Grantee Seminar Binder Dallas, TX, January 20, 2012 Seattle, WA, January 25, 2013 Round I Project Summaries from 2007 to 2009 Sacramento Public Library

Sacramento Bee Article, 2010 Grant Reports, 2008-10 Proposal and Correspondence, 2007-10 Schaumburg Township Library Reports 2008-09 Project Reports, Correspondence, and Financial Informational Brochures, 2007-09 Southeastern Libraries Cooperating (SELCO) Reports, 2008-09 Correspondence, 2008-09 Grant Proposal, 2007 Articles, 2008-09 Timberland Regional Library Correspondence, 2008-10 Your Money: A Guide to Reaching Your Financial Goals DVDs, 2010 Foundation Grant Proposal, 2007 Grant Reports, 2008-10 Financial Informational Brochures, 2006-09 Your Money: A Guide to Reaching Your Financial Goals Workbook Binder Winfield Public Library Grant Reports, 2008-09 Marketing Plan and Correspondence, 2007-09 Articles and Workshop Folders, 2008-09 Financial Informational Brochures, 2007-09

Box 3:

Winfield Public Library Kansas Small Business Development Center Workshop Folders, 2007-09 Public Library of Youngstown Mahoning County Grant Reports, 2009 Financial Informational Packets, 2008-09 Correspondence and Local Publicity, 2007-09 (2 folders) Round I Project Summaries from 2007 to 2009 Alliance Library System Grant Reports, 2008-09 Correspondence, 2008 Grant Proposal and Correspondence, 2007 Second Life Correspondence, 2008-09 Ames Public Library Correspondence, Local Publicity, and Grant Proposal, 2007-10 Advertisements and Local Publicity, 2008-09 Grant Reports, 2008-09 Milwaukee Public Library Foundation Grant Reports, 2008-09 Correspondence and Grant Application Drafts, 2008-09

Money Smart Week Promotional Handouts and Resource Guide, 2008-09 Naperville Public Library Foundation Grant Reports, 2009-10 Correspondence, 2008-09 Grant Proposal and Correspondence, 2007-08 Natrona County Public Library Grant Reports, 2009-10 Proposal, Correspondence, and Local Publicity, 2007-09 Newton Free Library Correspondence and Local Publicity, 2008-09 Retirement Planning Club for Women Publicity and Informational Booklets, 2008-09 (2 folders) Informational Booklets, 2001-08 Final Report and Promotional Fliers, 2009-10 Retirement Planning Club for Women, 2009-10

Box 4:

Final Report and Attachments, 2009-10 Handouts, 2006-10 Orange County Library System Grant Reports, 2009-11 Smart Investing Workshop Modules, 2009 Correspondence and Grant Proposal, 2008-10 Loveland Public Library Grant Reports, 2011 Correspondence, 2008-10 New Haven Free Public Library Grant Reports, 2011 Correspondence, 2008-11 Grant Report Form, 2009-10 Pioneer Library System Grant Reports, 2010 Correspondence, 2008-11 Recruit Notebook for Physically Fit Bootcamp Program, 2011 Publications and "Smart Money" Compact Disc, 2009-10 Includes Press Releases, Promotional Flyers, and a backup of a USB Drive prepared by Pioneer Library SMART Money Consultant Inger Giuffrida **Riverside County Library System** Grant Reports, 2009-11 Correspondence, 2008-11 **Round II Project Summaries** Glendale Public Library Minding Your Money Program Report, 2009

Minding Your Money Program Report, 2010-11
Athens-Clarke County Library
Grant Report, 2009
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<u>Box 5</u>:

Fargo Public Library Grant Reports, 2008, 2012 Correspondence, 2009-11 Senior Program and Foreign Language Publications, c. 2009 Includes English, Arabic, Kirundi, Nepali, and Somali Fond du Lac Public Library Grant Reports, 2008-10 Correspondence, 2009-10 Glendale Public Library Grant Reports, 2009-10 Includes 2010 Oklahoma Society of CPAs Financial Fitness Kit Correspondence, 2008-10 Minding Your Money Digital Video Discs (DVDs) Includes Teen Money Management, Capacidad Financiera 101; Usted Y Su Dinero Los Fundamentos, Financial Fitness 201: Investing Boot Camp, Financial Fitness 301: Retirement Planning Greenville County Library System Grant Reports, 2010 Correspondence, 2008-10 Digital Video Discs, c. 2007 Includes Money Track: A Public Television Series and Smart Investing Round III Project Summaries from 2010 to 2012 Albany Public Library Grant Reports, 2011 Correspondence, 2009-11 Alliance Library System Correspondence, 2009-10

Grant Reports, 2010-11 Bolivar County Library System Grant Reports, 2012 Correspondence, 2010-11 Brooklyn Public Library Grant Reports, 2012 Correspondence, 2009-11 Estes Valley Public Library District Grant Reports, 2012 Interim Grant Report, (2 folders), 2011 Correspondence, 2009-10 Seminars, 2011 Newspaper Articles and Fliers, 2011

<u>Box 6</u>:

Round III Project Summaries from 2010 to 2012 Georgetown Public Library Grant Reports, 2011 Application and Correspondence, 2009-11 Digital Video Disc History Series Great Depression Interviews Includes Bertha Cole, Archie Rodgers, Jeff Lewis, June Hora, Bob Hendrick, Edgie Huggins, Jamie Constance, Mary Reynolds Greensboro Public Library Grant Reports, 2012 Correspondence and Grant Application, 2010-12 Houston Public Library Grant Reports, 2012 Correspondence and Grant Application, 2009-11 Round III Project Summaries from 2010 to 2012 Jacksonville Public Library Correspondence and Grant Application, 2009 Grant Reports, 2012 Publications, 2006, 2012 Includes Calendar, Florida \$aves in Jacksonville Packets, and Kid\$Wealth Money Tracker Activity Book Grant Final Report Form, (2 folders), 2012 Libraries of Eastern Oregon (LEO) Grant Reports, 2012 Correspondence and Grant Application, 2009, 2011 Lewiston City Library Grant Reports, 2011 Correspondence and Grant Applications, 2009-11 Retirement Ready Program Reports, 2010 Publications, 2011

Includes Organize Your Important Papers, Investment Fraud: Protect Your Nest Egg, Identity Theft: Prevention and Detection, 360 degrees of Financial Literacy: A Primer on Financial Literacy Los Angeles Public Library Correspondence and Grant Application, 2009-12 Includes Compact Discs: The Language of Money @ Los Angeles Public Library (1 CD English Version), (2 CD Spanish Version), and Fraud Detection Grant Reports, 2011 Middle Country Public Library Grant Reports, 2011-12 Correspondence and Grant Application, 2009-11 Multnomah County Library Grant Reports, 2011-12 Correspondence and Grant Applications, 2010-12 Pike County Public Library District Grant Reports, 2012 Correspondence and Grant Application, 2009, 2012 Queens Library Grant Reports, 2010-11 Correspondence and Grant Application, 2010

<u>Box 7</u>:

Smart Investing@Your Library Content Modules Publication, 2012 State Library of Iowa Grant Reports, 2010-11 Correspondence, 2010-11 Grant Application and Correspondence, 2009 Virginia Beach Public Library Grant and Financial Reports, 2012 Grant Reports, 2011-12 Application and Correspondence, 2009-11 York County Library System Grant Reports, 2010-11 Application and Correspondence, 2009-10 Round IV Project Summaries from 2011 to 2013 Expansion Grants, 2010 Apache Junction Public Library Correspondence and Project Updates, 2011-13 Grant Reports, 2012-13 Application, 2010 **Burlington County Public Library**

Grant Reports and Correspondence, 2012-13 Final Grant Report, 2013 Grant Application and Correspondence, 2010-12 Workshop Presentations, Surveys, and Advertisements, 2011-12 Camden Public Library Project Overview and Description, 2012 Grant Reports, 2011-12 Application and Correspondence, 2010-12 Carmel Clay Public Library Project Overview and Description, 2013 Grant Reports, 2012-13 Application, Correspondence, and Fliers, 2010-13 Chesterfield County Public Library Final Report Attachments, 2012-13 Includes F.U.N. @ CCPL USB Drive and Compact Disc Grant Reports, 2012-13 F.U.N. @ CCPL Session Plans and Folder, 2011 Grant Application, Correspondence, and Interim Report Attachments, 2010-13 Interim Report Attachments, 2011 F.U.N. @ CCPL Final Report Attachments, 2012 (2 folders) Lesson Plans, 2014

Box 8:

Curtis Memorial Library Project Overview, Description, and Community Survey Results, 2012 Grant Reports, 2011-12 Application and Correspondence, 2010-11 "Money Works for Women" Fliers, Surveys, and Newspaper Articles, 2011-12 Binder, 2011 Emmet O'Neal Library Project Overview and Description, 2012 Grant Reports, 2011-12 Application and Correspondence, 2010-11 Round IV Project Summaries from 2011 to 2013 Martin County Library System Project Overview and Final Report, 2012 Grant Reports and Correspondence, 2011-12 "Money Smart" and "Budget Smart" DVDs, c. 2011 Press Releases, Presentations, and Handouts, 2011

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Includes Books and Beyond, Financial Literacy DVD, October 2010
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Mid-Term Report, 2012 Marketing Plan, Advertisements, Newspaper Articles, and Photographs, 2011 Publications, 2007, 2011 Includes Savings Fitness: A Guide to Your Money and Your Financial Future, and FINRA Smart Savings for College – Better Buy Degrees Investment Planning Folders, 2007-10 Includes English and Spanish, and Tricks of the Trade: Outsmarting Investment Fraud DVD Photographs, Handouts, and E-Newsletters, 2011-12 Santa Clara County Library Grant Reports, 2010-13 Application and Correspondence, 2010-13 Final Grant Report, 2013 Schaumburg Township District Library Project Overview, 2012 Grant Reports, 2011-12 Application, Correspondence, and "It's Your Money: Get Smart" Workshop Folders, 2009-11 Includes "It's Your Money: Get Smart" USB Drive "It's Your Money: Get Smart" Training Manual, 2011 Program Evaluations, 2011-12 "Dollar Wise" E-Newsletter and Website, 2011-12 Press Releases, Newspaper Articles, and Publications, 2010-12 List of Service Providers Trained, 2012 Advertising, 2012 Includes "Movie Ad" Compact Disc "It's Your Money: Get Smart" Train-the-Trainer Manual Binder, 2011 Washington-Centerville Public Library Project Overview and Description, 2012 Grant Reports, 2011-12 Application and Fliers, 2010-11 Box 10: Public Library of Youngstown and Mahoning County Grant Reports, 2011 Final Grant Report and Attachments, 2010-12 Grant Application, 2010 Interim Grant Report Attachments, 2010-11 Round V Project Summaries from 2012 to 2014 Ada Community Library

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2012-13 New Seminars and Basic Seminars, 2012-13 Correspondence, 2013 Grant Application, 2012 Final Report, 2015 (3 folders) Fayetteville Public Library Model Program, 2015 Grant Reports, 2014-15 Application and Correspondence, 2012-14 Includes Saving Money Makes Cents! Smart Choices Publication Georgetown County Library Correspondence and Middle School Lesson Plan, 2013-14 Grant Reports, 2014-15 Application, 2012 Hartford Public Library Grant Reports, 2013-15 Application and Correspondence, 2012-15 Housatonic Community College Library Grant Reports, 2013-14 Application and Correspondence, 2012-14 Huntsville-Madison County Public Library Model Program, c. 2015 Final Report, 2015 Grant Report and Correspondence, 2013-14 Interim Report, 2014 Public Relations Samples, 2013-14 Grant Application and Correspondence, 2012-14 Ida Rupp Public Library Grant Reports, 2014-15 Correspondence, 2013-14 "From Wall Street to Main Street: Myths, Miscues and Investment Fundamentals" Presentation, 2013 Grant Application, 2012 Jefferson County Library Grant Reports, 2013-14 Application and Correspondence, 2012-14 Multnomah County Library Correspondence and Newspaper Articles, 2011-13 Grant Reports and Financial Literacy Evaluation, 2012-14

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Grant Reports, 2015-16 Application and Monthly Updates, 2013-16 Newspaper Articles, Handouts, and Loud & Clear Newsletters, 2014-15 F.U.N. @ CCPL Financial Literacy Program Curriculum, 2014-16 Idaho Commission for Libraries Grant Reports and Evaluations, 2015-16 Grant Application, Marketing Plan, and Project Updates, 2013-14 "Stash Your Cash" Financial Literacy Project Training Binder, 2014 Middle Country Public Library Grant Reports, 2014-15 Application, 2013 New Hanover County Public Library Grant Reports, 2014-15 Application and Correspondence, 2013-15 Round VII Project Summaries from 2014 to 2016 Glen Carbon Public Library Correspondence, 2015-16 Interim Report, 2015 Grant Application and Project Updates, 2013-14 Final Report and Evaluations, 2016 Pelham Public Library Correspondence, 2015 Grant Application and Reports, 2013-15 "Bank on Books" Project Overview and Correspondence, 2014-15 Smart Investing@Your Library Events Binder, 2012 (3 folders) Includes Delores Hydock Promotion Compact Disc Box 13: Piscataway Public Library Project Update and Drafts, 2015 Grant Reports, 2014-15 Application and Correspondence, 2013-14 Central Library of Rochester & Monroe County Final Grant Report, 2016 Grant Application and Correspondence, 2013-15 Round VII Project Summaries from 2014 to 2016 Santa Fe College Final Grant Report, 2016 (spiral-bound) Grant Application and Correspondence, 2013-15 Activities, 2015 (spiral-bound) Includes Financial Literacy Grant, 2014 Annual Report, 2015 Annual

Report, Timeline, Status Report, Budget, Resources
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Saratoga Springs Public Library
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- Pioneer Library System Correspondence, Grant Application, and Grant Reports, 2015-16
- Salt Lake County Library Services Correspondence, Grant Application, and Grant Reports, 2015-16
- San Diego Public Library Correspondence, Grant Application, and Grant Reports, 2014-15
- San Francisco Public Library Correspondence, Grant Application, and Grant Reports, 2015-16
- Virginia Beach Public Library Correspondence, Grant Application, and Grant Reports, 2015-16
- Washington-Centerville Public Library Correspondence, Grant Application, and Grant Reports, 2015-16
- Building Native Communities: Investing for the Future, First Nations Development Institute and FINRA Investor Education Foundation, 2012
- Building Native Communities: Investing for the Future Instructor's Guide, First Nations Development Institute and FINRA Investor Education Foundation, 2012
- Nightly Business Report: Get Your Finances Ready for Retirement: Matters to Consider Before You Retire, (1 DVD), 2008

Publications

- Get More Money Now: How to Have Better Credit and More Money for Things That Matter, Better Business Bureau, 2006, 2008
- Mas dinero ya: Como tener mejor credito y mas dinero para las cosas que importan, (Spanish), Better Business Bureau, 2006, 2008
- Fighting Fraud 101: Smart Tips for Older Investors, saveandinvest.org, 2009
- *Como combatir el fraude financiero: Consejos inteligentes para los inversionistas mayores, 2008*
- Money and Mobility: For Military Personnel and Families, Revised Edition, 2008
- Saving Fitness: A Guide to Your money and Your Financial Future, Revised September, 2008
- Investors Guide to Securities Industry Disputes: How to Prevent and Resolve Disputes with Your Broker, Pace Law School Investor Rights Clinic, Jill Gross and Alice Oshins, undated
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- American Society of Association Executives (ASAE) Associations Advance America Award of Excellence, 2009
- Box 14 is 0.10 Empty