

Outstanding PEP Banker or Bank Award Checklist

In addition to the application, entries must include a written narrative explaining the content, in two pages or less, using the following components: original presentations/programs, leadership, creativity, public relations, results. ALL evidence, except videos, must fit in ONE three-ring binder. This checklist is a guide line and suggests what to include in your portfolio rather than what is required.

1. ORIGINAL PRESENTATIONS/PROGRAMS — If it is an ongoing program, how did it change or grow during the current PEP year?

- a. Title of original program
- b. Statement of goals and objectives
- c. Presentation/program outline
- d. List of elements covered and methods used
- e. List or description of creative features
- f. Age range of target audience

2. LEADERSHIP – In the community, bank school

- a. Specific role played by nominee in motivating and organizing others to achieve program goals
- b. Training and preparing others to participate in the program
- c. Serving as a role-model
- d. Establishing relationships and networks
- e. Building support for the program and initiating participation in the program — at bank, in community, in schools, etc
- f. Other evidence not listed above

3. CREATIVITY

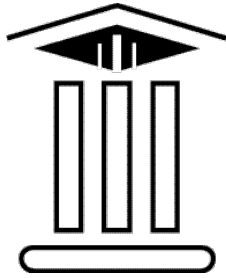
- a. Activities created to reinforce the topic
- b. Integration of existing materials to message
- c. Tailoring materials to target audience
- d. Use of materials that engage participants
- e. Visual aids — overheads, puppets, computer graphics, etc
- f. Photographs to document elements of program
- g. Other evidence not listed above

4. PUBLIC RELATIONS

- a. Program(s), presentation(s), award(s), or other publicized activity—description of event or activity
- b. A written public relations plan
- c. Press releases and other contact with media—copies of correspondence
- d. Participation in community group meetings/activities—letters of acknowledgements
- e. Photos of public appearances
- f. Brochures/flyers/posters—photo of poster is acceptable
- g. Copies of magazine/newspaper articles, videotapes of TV coverage, and/or scripts or cassettes from radio
- h. Other evidence not listed above

5. RESULTS

- a. Results achieved—tie-in with statement of goals/objectives
- b. Evaluation method used
- c. Letters from partners/teachers/students—should reflect program content and what was learned
- d. Estimated number of people reached
- e. Number of bankers participating
- f. Other evidence not listed above



TENNESSEE BANKERS ASSOCIATION
Personal Economics Program
Outstanding PEP Banker or Bank Award
2006-2007 Application

NOMINEE

Enter full name of bank or banker (as it should appear on award)

Bank Contact Person: _____ Title: _____

Telephone: _____ Fax: _____ E-mail: _____

Bank President or CEO: _____

Bank Mailing address: _____

City: _____ State: _____ Zip: _____

GENERAL INFORMATION

(Report listed items below as of December 31, 2006)

Total bank assets (in millions of dollars): \$ _____

Number of communities in your market area delineated for CRA purposes: _____

Number of schools in the area your bank serves : _____

Number of years bank/banker has been involved with consumer education: _____

Number of full-time employees at the bank: _____

Number of bank employees active in the Personal Economics Program : _____

Please note: Complete this form and submit along with supporting documents or portfolio. Your entry must arrive in the TBA office by March 6, 2007.

Send entries: Tennessee Bankers Association
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