

**PENNSYLVANIA Credit Union Foundation**  
**"Carrying on the Tradition"**  
**FINANCIAL LITERACY PROJECT**  
**APPLICATION/QUESTIONNAIRE**

**1. Introduction:**

- a. *Name of Credit Union/Organization*                      *Milton Hershey High School  
(through Members 1<sup>st</sup> FCU)*
- d. *Name & Title of Contact*                                      *Matt Bergman & Lauren Podolsky*
- f. *Contact's Day Telephone #*                                      *(717) 520-2860*
- g. *Contact's Email Address*                                      [\*mattbergman14@gmail.com\*](mailto:mattbergman14@gmail.com)  
[\*podolskyl@members1st.org\*](mailto:podolskyl@members1st.org)

**2. Type(s) of Financial Literacy Projects (Mark "X" next to appropriate box)**  
**(YOU MAY CHOOSE MORE THAN ONE TYPE OF PROJECT)**

- a. *Classroom Education Component?*                      *X*
- b. *Literature/Audio Visual*                                      *X*
- c. *Scholarships (etc)*    *X*

**3. Cost and Inputs**

**A. SCHOOL/ADULT/WORKPLACE EDUCATION COMPONENT**

- i. *Name of School District Firm or Institution? Milton Hershey HS*
- ii. *Type of Trainer? (Mark "X")*
- (1) *Credit union volunteer(s)?*                                      *X*
- (2) *Teachers?*    *X*

**B. LITERATURE/AUDIO-VISUAL**

- i. *Titles?*
- Books?                      National Endowment of Financial Education (NEFE) for  
High School Textbooks (free)*
- ii. *Numbers Purchased?*
- Teachers guides?                      2 (free)*
- Student guides                      30 (free)*

<b>iii. Cost? (Purchase &amp; Distribution)</b>		
(1) iPads (Quantity = 10)	\$	4790.00
(2) iPad Cases (Quantity = 6)	\$	499.90
(3) Money for Aps	\$	200.00
<b>Total Cost B?</b>	\$	<b>5489.90</b>
(SUBMIT INVOICES)		

**Grand Total Cost Inputs (A+B+C)** \$ **5489.90**

**Foundation Request** \$ **5489.90**

**4. ANTICIPATED ANNUAL RESULTS (Monitoring & Evaluation)**

**A. SCHOOL/ADULT/WORKPLACE EDUCATION COMPONENT**

**Financial Literacy Challenge (Matt and Lauren)**

(1) Number of Teachers/class?	2
(2) Number of Classes/year?	15
(3) Duration of classes (hrs.)?	1 hr.
(4) Number of Students?	60
(5) Number of students/class	15
(6) Person hours - Teachers? (1 x 2 x 3)	30
(7) Person hours – Students? (2 x 3 x 4)	900

**Lauren’s Financial Literacy Classes with Transitional Living and Rising Senior Transition Program in May/June 2012**

(1) Number of Teachers/class?	1
(2) Number of Classes/year?	12
(3) Duration of classes (hrs.)?	1 hr.
(4) Number of Students?	198
(5) Number of students/class	varies
(6) Person hours - Teachers? (1 x 2 x 3)	12
(7) Person hours – Students? (2 x 3 x 4)	2376
(8) Total Person Hours (900 + 2376)=	3276

In the second year of the MHS Financial Literacy Challenge, we noticed several things:

- a) We need to continue to offer the after school Financial Literacy Challenge to students at MHS. Lauren and Matt have made changes to the programming this year, to make it more relevant to students. With these changes in mind, we have found that there is a need for flexible and portable technology to enhance already existing programming.
- b) There is a need for Financial Literacy programming on breaks like Christmas, Thanksgiving, Easter, and summer. The school has an existing program called the

Year Round Experience (YRE) program for our students. Matt is currently working with YRE to establish short financial literacy tutorial classes. There is a large population of students who do not go home and stay on campus for various reasons. Due to this need, the opportunity to teach financial literacy programs is available, which Matt is willing to do. Due to the nature of the programming needed for these breaks, a more interactive and technological approach is needed to motivate students and add to the already existing hands-on programming.

- c) We need to establish a stronger relationship between the MHS community and Members 1ST . We are currently working with administration to make the shift of student accounts from PNC to Members 1ST a reality. We are working with administration to make changes that seem to have slowed due to red tape. Matt, Lauren, and George had a meeting with administration to come up with an action plan. Currently all seniors at the school have Members 1ST accounts. However, underclassman accounts seem to be an area of challenge. We suggested a test pilot program, where certain house parents and their students will shift their accounts over to Members 1ST during this school year. The plan is to make this a requirement starting next school year for all house parents and students in grades 9 – 11.
- d) In order to develop more of an emotional connection to the branch and to foster use, Matt and Lauren will be creating a “Name the Branch” Contest, where students will compete to create a new name the Members 1ST branch. This will provide an emotional buy in for students.
- e) Lauren has been consistently working with our senior class in the Transitional Living Program since 2010. She offers financial literacy workshops once a month to students at the school. She will continue offering these services throughout the next year.

**5. TIME LINE For Implementation Activities as follows:**

<u>Activity</u>	<u>Mo./Yr. to Mo./Yr.</u>
.Education Component	November 2011 – Dec. 2012
.CU Branch Use (Provide Members & Nos. Members Services)	September 2011 – Dec. 2012
.Purchase of Literature/Licensing	
.Purchase of iPads	November 2011 – Dec. 2011
.Use of Literature/Licensing	November 2011 – Dec 2012
.Use of iPads	November 2011 – Dec. 2012
.Project Monitoring/	May 2012 – Jan. 2012
.Project Evaluation	Jan 2012

=====  
**Provide the Foundation with all requested invoices.**

**THE FOUNDATION WILL AWARD GRANTS UP to \$10,000 per GRANTEE**

**If you have questions, contact:**

Joseph C. Wambach Executive Director

**Tel: (800) 932-0661 ext. 5244**

**Email: [joseph.wambach@pcua.coop](mailto:joseph.wambach@pcua.coop)**