

TENNESSEE BANKERS ASSOCIATION

PERSONAL ECONOMICS PROGRAM



Outstanding PEP Banker or Bank Award
2009-2010 Application

Nomination Deadline: Must be received by February 15, 2010

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

Bank Contact Person: _____ Title: _____
Phone: _____ Fax: _____ E-mail: _____
Bank President or CEO: _____
Bank Mailing address: _____
City: _____ State: _____ Zip: _____

GENERAL INFORMATION

(Report listed items below as of December 31, 2009)

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 February 15, 2010.

Outstanding PEP Banker or Bank Award

Tennessee Bankers Association

Attn: T'Lanie Ruegge, Member Services Specialist - truegge@TNBankers.org

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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 and 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