

 TAKE CHARGE TODAY Financial Education for a Better Future	<h1 style="margin: 0;">GUEST SPEAKER</h1> <h2 style="margin: 0;">Active Learning Tool</h2> <p style="margin: 0;">www.takechargetoday.arizona.edu</p>	 TAKE CHARGE AMERICA Institute For Consumer Financial Education and Research
---	---	---

RECOMMENDED GRADE LEVELS	AVERAGE TIME TO COMPLETE	EACH LESSON PLAN IS DESIGNED AND CONTINUALLY EVALUATED “BY EDUCATORS, FOR EDUCATORS.” THANK YOU TO THE FOLLOWING EDUCATORS FOR DEVELOPING COMPONENTS OF THIS LESSON PLAN.
All	Facilitation: Varies	<ul style="list-style-type: none"> None available

NATIONAL STANDARDS	LESSON PLAN OBJECTIVES
See the lesson plan from which you are integrating concepts for an applicable list of standards.	Upon completion of this lesson, participants will be able to: <ul style="list-style-type: none"> Prepare for a guest speaker or panel Reflect on what they learned from a guest speaker

MATERIALS		
MATERIALS PROVIDED IN THIS LESSON PLAN	MATERIALS SPECIFIC TO THIS LESSON PLAN BUT AVAILABLE AS A SEPARATE DOWNLOAD	MATERIALS TO ACQUIRE SEPARATELY DEPENDING ON OPTIONS TAUGHT
<ul style="list-style-type: none"> Guest Speaker Form 1 worksheet 3.0.22.A1 Guest Speaker Form 2 worksheet 3.0.22.A2 Panel Form worksheet 3.0.22.A3 Sample Panel Invitation Letter 3.0.22.E1 Sample Thank You Letter 3.0.22.E2 	<ul style="list-style-type: none"> None available 	<ul style="list-style-type: none"> Bottled water for speakers Secure speakers

RESOURCES	
EXTERNAL RESOURCES	
External resources referenced in this lesson plan: <ul style="list-style-type: none"> Fisher, D, & Frey, N. “Improving Adolescent Strategies that Work” (2003) 	
TAKE CHARGE TODAY RESOURCES	
Similar lesson plan at a different level: <ul style="list-style-type: none"> None available 	Optional lesson plan resources: <ul style="list-style-type: none"> All personal finance topics

CONTENT
<p>Guest speakers are a great addition to any classroom. Due to the real-life connection of personal and family finance content, the financial education classroom is enhanced by having guest speakers. Educators can help participants receive the most from a guest speaker visit by preparing for the visit, having participants take notes during the visit, and then reflecting on the visit. The <i>Guest Speaker active learning tool</i> 3.0.22 includes resources that assist with bringing guest speakers and panels into the classroom.</p>

LESSON FACILITATION

PREPARE

Visual indicators to help prepare the lesson

INSTRUCT

Instructions to conduct the lesson facilitation

CUSTOMIZE

Potential modifications to lesson facilitation

RECOMMENDED FACILITATION

There are three recommended facilitation options

Facilitation Option 1: Guest Speaker Worksheet

Facilitation Option 2: Discussions

Facilitation Option 3: Panel

Facilitation Option 1: Guest Speaker Worksheet

Approximate time: varies

Materials to prepare:



- 1 *Guest Speaker Form 1* worksheet 3.0.22.A1 per participant
- Bottled water per speaker

1. Give participants the *Guest Speaker Form 1* worksheet 3.0.22.A1.
 - a. Instruct participants to complete the before, during, and after sections of the form at the appropriate times.

Facilitation Option 2: Discussions

Approximate time: varies

Materials to prepare:



- 1 *Guest Speaker Form 2* worksheet 3.0.22.A2 per participant
- Bottled water per speaker

1. Prepare participants by giving them the *Guest Speaker Form 2* worksheet 3.0.22.A2 and by completing the following:
 - a. The day before the speaker:
 - i. Discuss the purpose of the speakers visit and have participants complete the “purpose” section of the form.
 - ii. Have participants prepare three questions they have for the speaker in the “questions” section of the form.
 - b. During the speaker’s presentation:
 - i. Have participants take notes in the “unique experiences” and “connections” section of the form.
 - ii. Have participants record answers to their questions in the “answers” section of the form.
 - c. After the speaker:
 - i. Have participants share what they learned during the presentation.
 - ii. Have participants share what they still have questions about and discuss.

Facilitation Option 3: Panel

Approximate time: varies



Materials to prepare:

- 1 *Panel Form* 3.0.22.A3 per participant
 - Bottled water per speaker
1. If hosting a panel of multiple guest speakers, the *Panel Form* 3.0.22.A3 is available to assist participants in taking notes on each panel member's contributions. The form includes space to take notes over four panel members. Multiple copies of this form can be printed depending upon the number of panel members present.
 - a. The *Sample Panel Invitation Letter* 3.0.22.E1 is provided to send to potential panel members.
 2. After hosting a guest speaker, many choose to write a thank you letter to that person. The *Sample Thank You Letter* 3.0.22.E2 is provided to assist educators. However, if time allows, educators are encouraged to have participants write personalized thank you letters or notes.
 3. Tips for hosting a guest speaker in the classroom:
 - a. After an appointment/time is set up with a speaker, send the speaker a confirmation email or postcard along with an attached course syllabus and school map.
 - b. Prepare the school's front office for the speaker's arrival, so the speaker is greeted warmly and a parking pass is printed (if needed).
 - c. Print off a seating chart for the guest speaker (if applicable).
 - d. Provide a bottle of water for the speaker.



Guest Speaker Form 1

	Total Points Earned
9 points	Total Points Possible
	Percentage

Name _____

Date _____

Class _____

Directions: Fill out the following form using complete sentences and following the timing of each section.

BEFORE

Name and Title of Speaker:

Purpose of Visit:

Possible Discussion Questions:

DURING

Information Shared:

Questions:

Answers:

AFTER

Three things I learned or found interesting:

1.

2.

3.

Guest Speaker Form 2

	Total Points Earned
11	Total Points Possible
	Percentage

Name _____

Date _____

Class _____

Directions: Fill out the following form using complete sentences. Complete the “purpose of visit” and “questions” section prior to the guest speaker. During and after the guest speaker, complete the remaining sections.

Name of speaker _____ Title _____	
Purpose of visit:	
Unique experiences:	
Connections:	
Questions: 1. 2. 3.	Answers: 1. 2. 3.

Activity Source: (2003) Fisher, D, & Frey, N. “Improving Adolescent Strategies that Work



Panel Form

	Total Points Earned
12 (1 point per box)	Total Points Possible
	Percentage

Name _____

Date _____

Class _____

Panel Member	Name and Title:	Information Shared:	Questions and Answers:
Panel Member	Name and Title:	Information Shared:	Questions and Answers:
Panel Member	Name and Title:	Information Shared:	Questions and Answers:
Panel Member	Name and Title:	Information Shared:	Questions and Answers:



Sample Panel Invitation Letter

[DATE]

Dear [NAME OF PANEL MEMBER],

The [CLASS TITLE] at [NAME OF SCHOOL] is inviting you to be on a class guest speaker panel on [DATE OF EVENT] from [START TIME] to [FINISH TIME].

The purpose of this panel is to [EXPLAIN WHAT YOUR CLASS HAS BEEN LEARNING THAT PERTAINS TO THE PANEL]. The panel will consist of [NUMBER OF PANEL MEMBERS] members of the community. Each panel member will discuss [EXPLAIN SPECIFICALLY WHAT THEY WILL BE SPEAKING ABOUT]. Students will also be able to ask questions to the panel after all the overviews are finished.

We hope that you will be able to participate in this panel and share your expertise. Thank you for your consideration and I look forward to hearing from you. You can reach me at [PHONE NUMBER] or by email [EMAIL ADDRESS] by [DATE].

Sincerely,

[YOUR NAME]
[JOB TITLE]



Sample Thank You Letter

[DATE]

Dear [NAME OF GUEST SPEAKER],

On behalf of the [CLASS TITLE] at [NAME OF SCHOOL], I would like to thank you for taking the time to be a guest speaker in our classroom. The students greatly enjoyed your presentation and learned a lot of valuable information.

The time you dedicated to encourage and show support for the youth of our community was greatly appreciated. Your participation as a guest speaker has made an impact on the future success of these students. Thank you once again for volunteering and sharing!

Sincerely,

[YOUR NAME]

[JOB TITLE]