

Excellence and Access – the innovative project that has sought to raise the confidence and competence of teachers in secondary schools in England in the field of personal finance education

“**Excellence and Access** has shown how personal finance education can be relevant, meaningful and enjoyable for students in a variety of curricular, cultural and organisational contexts.”

Jan Campbell, Head of Diversity and Inclusion Team,
Qualifications and Curriculum Authority

“The FSA has actively supported **Excellence and Access** from the outset of the project. The regional seminars will provide a great opportunity for schools to hear about the good practice in personal finance education developed through **Excellence and Access** and will give businesses an opportunity to explore the role they can play.”

The Financial Services Authority

“Personal finance education has an important role to play in helping break the cycle of financial exclusion and in enabling children to become more self sufficient. DfES welcomes this series of regional seminars which will provide all those with an interest with the opportunity to hear more about **Excellence and Access**.”

Department for Education and Skills

Regional Seminars

Derby 04.02.04	Newmarket 12.02.04	Bolton 03.03.04
Leeds 10.03.04	Reading 17.03.04	Taunton 20.04.04
Newcastle Upon Tyne 28.04.04	Wolverhampton 19.05.04	
London 26.05.04		

Financial Capability in the Classroom – The Way Ahead
Regional Seminars
February – May 2004



pfeg’s mission is to ensure that all young people are equipped with the confidence, skills and knowledge they need in financial matters so that they can participate fully in society. Join us at one of our seminars to explore the lessons learnt from **Excellence and Access** – a project designed to raise the confidence and competence of teachers in personal finance.

pfeg would like to thank the following companies for their generous support in funding **Excellence and Access**.



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pfeg Helping teachers to develop
financial capability in young people

The seminars

What are they?

This programme of seminars aims to give participants the opportunity to:

- Learn how **pfeg's** flagship project **Excellence and Access** supported teachers in integrating personal finance education in the classroom.
- Contribute to the debate on the importance, development and future of personal finance education in today's society.
- Discuss how education, industry and government are working together and taking an active collective responsibility for ensuring that young people leave school with personal finance skills.
- Find out what they can do to help educate and empower successive generations of financially aware young people.

Who should attend?

The seminars will be of interest to head teachers, senior management teams, LEA advisory staff, educational and enterprise organisations, business representatives, community leaders and key regional influencers from the nine Government Office Regions in England. Delegates will have an active and passionate interest in promoting financial capability in young people.

Why should I go?

The seminars are a great opportunity to:

- Explore ways of meeting learning objectives around financial literacy, citizenship and PSHE.
- Gain first hand insights from others on how personal finance education can work in the classroom.
- Discuss with pilot schools issues surrounding personal finance education.
- Explore ways to utilise and work with external organisations.
- Be part of a network of key stakeholders who have pledged to help ensure the dissemination of **Excellence and Access** throughout the UK.
- Take away good practice guides and information packs which will help you to make a case for personal finance education after the event.

A plan of your day

Workshops will vary according to local circumstances. The following are examples of workshops that are likely to be offered. All will be participative and aim to explore a variety of ways to integrate personal finance teaching into the classroom. Teachers and students from schools supported by **Excellence and Access** will play a key role.

Key Stage 3

Look at the experience of pupils and teachers from a school that has planned and delivered a programme of personal finance set within citizenship and the wider Key Stage 3 strategy.

need not be a difficult task. See how one school tackled the issue with personal finance lessons. School planning, classroom delivery and the testimony of pupils will all be included.

Professional Development for Teachers

So how are teachers trained to deliver financial capability? This workshop will consider the various strategies that can be employed.

Sample Programme

10:00 am	Registration
10:30 am	Welcome – Government Office representative to chair Excellence and Access in Practice – lessons and implications. Wendy van den Hende, Chief Executive, pfeg
11:05 am	Keynote address
11:20 am	Presentation from a local school on developing financial capability
12:00pm	Workshop 1
12.50pm	Lunch
1:30pm	Workshop 2
2:15pm	Workshop 3
3:10pm	Financial Capability – The Way Ahead LEA representative
3:20pm	Informal networking

Key Stage 4

This workshop looks at the development and implementation of a programme to support the development of independent living skills. Hear the pupils' views of their experience.

16-19

Listen to the views of post-16 students as they describe their financial expectations of the future and the work they have been doing to develop the necessary skills to deal with the decisions that lie ahead.

Working with the World of Finance

Meet teachers and representatives from the finance world to hear how productive relationships are built and how the finance professional can help teachers' classroom delivery.

Working in a Diverse Community

Dealing with cultural diversity

Reply slip

I would like to attend one of the **Financial Capability – The Way Ahead** regional seminars.

There is no charge. Places will be allocated to ensure a broad representation from the various interest groups.

Please tick the appropriate box and return to:

Sarah Curtis, **pfeg**, Third Floor South, Lector Court, 151-153 Farringdon Road, London EC1R 3AF

Tel: 020 7833 2184 Fax: 020 7833 1998 email sarah.curtis@pfeg.org

Derby	04.02.04	<input type="checkbox"/>	Leeds	10.03.04	<input type="checkbox"/>	Newcastle Upon Tyne	28.04.04	<input type="checkbox"/>
Newmarket	12.02.04	<input type="checkbox"/>	Reading	17.03.04	<input type="checkbox"/>	Wolverhampton	19.05.04	<input type="checkbox"/>
Bolton	03.03.04	<input type="checkbox"/>	Taunton	20.04.04	<input type="checkbox"/>	London	26.05.04	<input type="checkbox"/>

Confirmation of your booking, a full programme and details of workshops will be sent to you upon receipt of your reply.

Name:

Position:

Organisation:

Address:

Telephone No.:

Email address:

☐ Please tick if you would like to receive regular updates on the work of **pfeg**.

www.pfeg.org