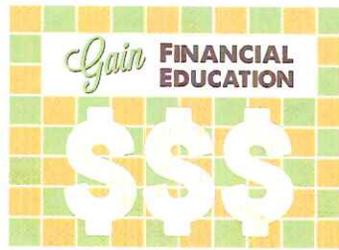


Exhibit A



Smart Investing@your library® Builds Nebraska Communities

*A grant awarded by the
American Library Association and the FINRA Investor Education Foundation
to the Nebraska Library Commission and the Northeast Library System
to provide financial literacy training at 22 libraries across Nebraska*

The Nebraska Library Commission **Marketing Planning Webinar** is set for **September 11, 2014**. This webinar will assist local library marketing teams in planning and implementing an effective marketing strategy for the *Smart Investing @your library® Builds Nebraska Communities* customer training. Plan to attend to learn how to communicate with your local audience and how to influence them to take advantage of your upcoming training activities designed to help them make informed decisions about budgeting, money management, saving for college, buying a home, retirement planning, and more.

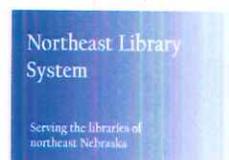
Now is a good time to start planning for how you will reach your target audience (Young Adults—age 20-40, Retirees, or Pre-retirees), who may, or may not, be current library customers. Steps to get started include:

- **Identify the individual(s)**—staff &/or volunteers—that will handle marketing. These staff and volunteers should plan to attend the September 11 Webinar or watch the recorded version. Register at <http://nlc.nebraska.gov/scripts/calendar/eventshow.asp?ProgId=13470>.
- Check out the “**Smart Investing@your library® Media Training Guide**” prior to the September 11 Webinar at <http://smartinvesting.ala.org/wp-content/uploads/2011/08/How-to-Work-with-the-Media-2.0-Training-Guide.pdf>. It has great ideas on how to pitch this story for radio or print. You might find just the right journalist to champion your project—one that wants to retire someday and may need one of your books or DVDs.
- Watch the ALA Webinar “**Taking a Blended Approach to PR**” at <http://smartinvesting.ala.org/pr-webinar/> prior to the September 11 Webinar. This ALA webinar focuses on how to embrace a broader definition of communications...using social media along with traditional media relations to create the right mix for building awareness.
- Plan to attend a **Nebraska Library Commission Webinar** on September 11, 2014 to work on planning your local marketing campaign. At this Webinar, staff and volunteers involved in the *Smart Investing@your library® Builds Nebraska Communities* project will come together via Go to Webinar to plan a local marketing campaign. Participants will initiate a process to select a target market for financial education activities, and will identify strategies and resources to communicate with them.

Thanks so much for working on this important educational project.



Nebraska
Library Commission





Smart Investing@your library®
Builds Nebraska Communities

**Marketing Customer Training
@ Your Library®**
September 11, 2014






Smart Investing@your library®
Builds Nebraska Communities

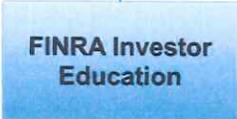
- *This program, administered by the Nebraska Library Commission and the Northeast Library System, is made possible by a grant from the FINRA Investor Education Foundation through Smart Investing @your library®, a partnership with the American Library Association.*
- *(Please also use this acknowledgement when publicizing the customer training at your library)*

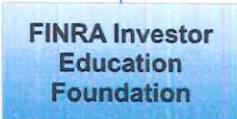
FINRA & the FINRA Foundation 

- Independent
- Regulates brokers/firms
- Writes/enforces rules
- Dispute resolution



- Monitors trading
- Educates brokers
- Educates investors
- Protects investors



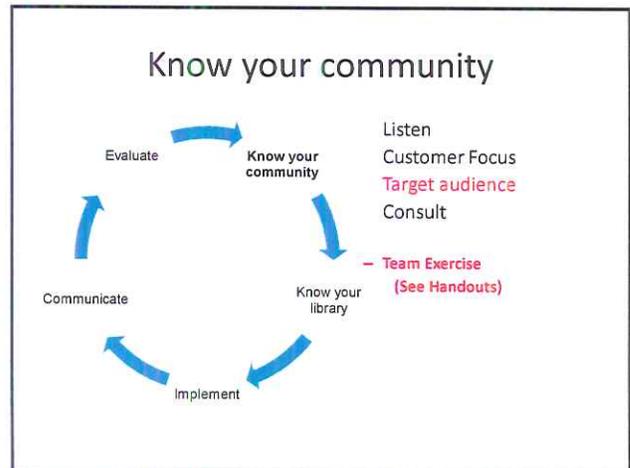
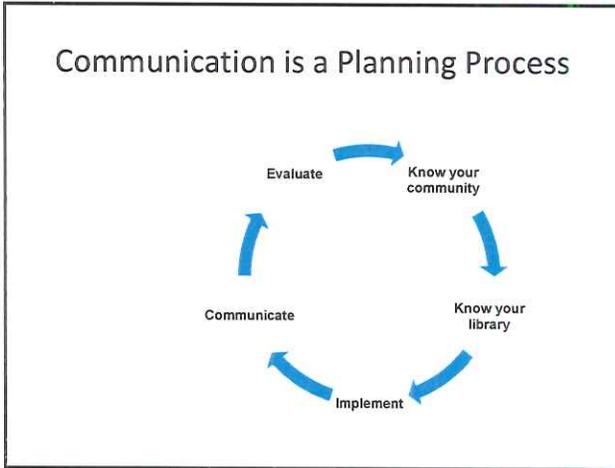






Steps for Communicating about
Library Customer Training

- Assemble a Team
- Select Target Audience
- Plan Communication Efforts
- Implement Communication Strategies
- Evaluate Communication Effectiveness



Communication:
Getting the Word Out about Customer Training

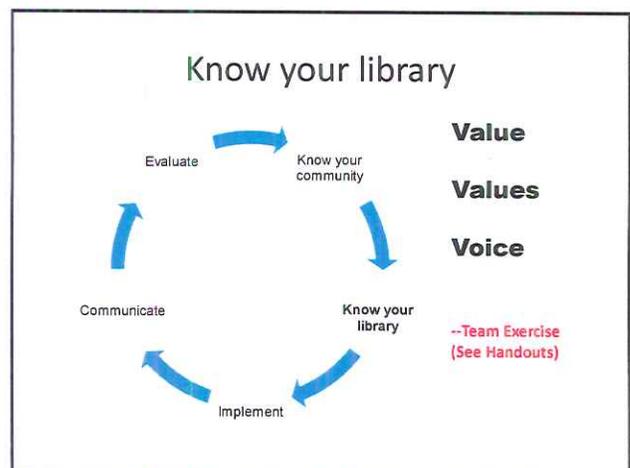
Know Your Community Exercise for Marketing Teams

Make a list of seven to ten organizations (clubs, agencies, groups, businesses, etc.) that are potential library partners or represent potential library customers in the target audience for the training.

Use your local newspaper, telephone directory, other local directories, or other appropriate resources for this assignment.

For each of the organizations you listed above, provide the following information:

- Name, address and telephone number for a contact person in the organization.
- Connection between *Smart Investing @ your library® Builds Nebraska Communities* library services and products and benefit to their organization.
- Possible activities that would communicate—or market—the library’s services and products to the organization. (For example, offsite demonstrations or training, speaking engagements, etc.)
- How would an association with this organization benefit the library?





Know Your Library

Exercise for Marketing Teams

You all know your own library pretty well, don't you? Even those of us who have worked in our libraries for a very long time can sometimes learn something new by taking a systematic look at it. Select one (or more) of the following exercises:

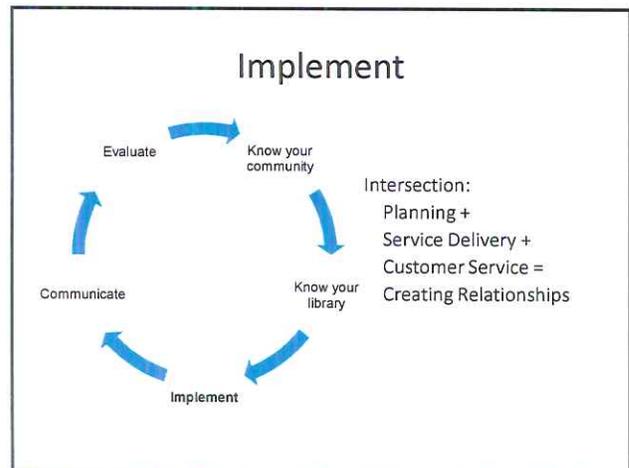
Guided Visualization
Try to approach this with a fresh eye.

Photo Safari and Analysis
One way to really get to know your library is to try to see it through the eyes of a stranger by studying photographs of your library.

Mystery customers
Involve others in this assessment.

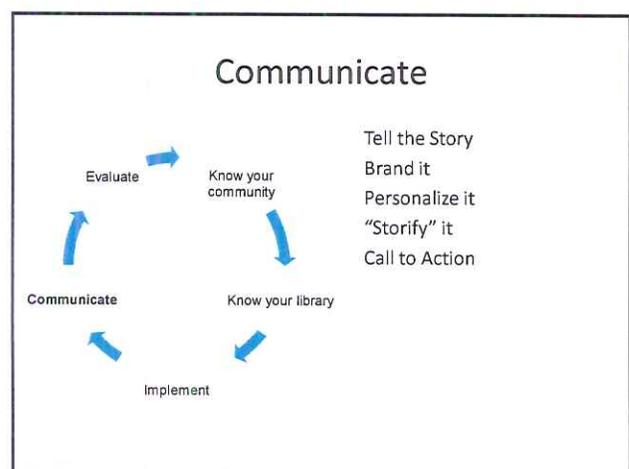
What's the point of these exercises?

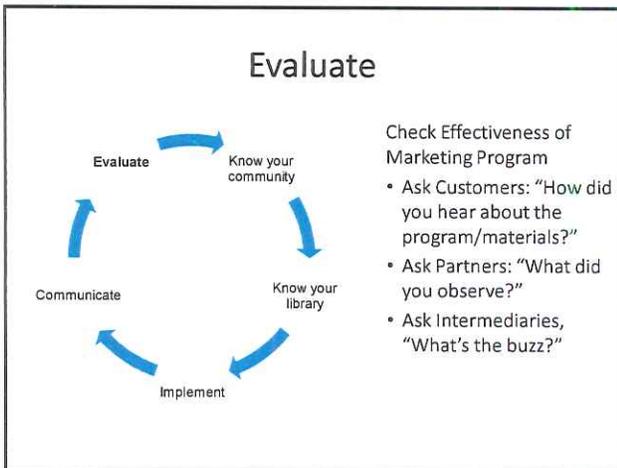
- Assess the curriculum and the collection as to how they will meet the needs of the target audience.
- Determine what you need to learn to sell the product (training, and resources) to the target audience.



Event Planning Form

Event	Location	Staff Contact
Planned Attendance	General Public	Subscribers/Partners
Program	The business/audience's benefit	
Marketing/Outreach	Phone	Direct Mail
Partnership	Shared space, shared program, shared resources	Who will coordinate and support?
Promotion/Advertising	Who will create and distribute?	Who will coordinate and support?
Staff/Personnel	Who will coordinate and support?	Who will coordinate and support?
Supplies	Material, program, service	Who will provide?
Budget	General Public	Subscribers/Partners
Follow Up	Thank you	Special appreciation for partnering
Other	Notes	Other





Determine the Marketing Mix

Create Ambassadors. Create Word of Mouth.

- Staff
- Customers
- Intermediaries
- Others?

Work together on Communication Strategy Menu
Make it easy
Make it fun

Communication Strategy Menu

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Persons Responsible	Results
<p>Outreach Share the message directly. Go where the customers are. Partner with organizations. Speaking engagements Interview shows Sponsorship of community events/activities Offsite seminars Offsite workshops Service club membership Other club memberships Offsite delivery of library services Offsite demonstrations Offsite displays Other</p>					

Marketing @ your library™

Communication Strategy Menu

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Persons Responsible	Results
<p>Word of Mouth Create Word of Mouth: Talking Points and Fact Sheets</p> <p>Online and Social Networking: Creating the Buzz: Library/Partner Website Library/Partner Facebook Library/Partner Twitter Library/Partner YouTube Other</p>					

Marketing @ your library™

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Person Responsible	Results
<p>Paid Advertising Radio Television Outdoor billboards Direct Mail Letters Newsletters product/service announcements Flyers Postcards "Special customer" offers Brochures Direct response Coupons Bill stuffers Other</p>					
Marketing @ your library™					

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Person Responsible	Results
<p>Collateral (not as powerful as people) Print: Newspaper Magazines "Shoppers" (free or classified ad magazines) Yellow Pages Special directories (regional, seasonal, Chamber) Trade or industry directories (e.g., <i>Thomas' Register</i>) Cooperative ad support from your library vendors Flyers Posters Handouts Other</p>					
Marketing @ your library™					

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Person Responsible	Results
<p>Public Relations News releases Articles in magazines, journals, etc. Open houses, coffees, etc. Other</p>					
<p>One-On-One Selling Presentation materials Personal letters Customized proposals Telemarketing Library personnel training Other</p>					
Marketing @ your library™					

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Person Responsible	Results
<p>Sales Promotions Discounts Loss leaders Coupons "Buy one fine, get one free" Other</p>					
<p>Specialty Advertising Credit Card Flash Drives Matchbooks Key-chains Novelties Calendars Datebooks Bookmarks Other</p>					
Marketing @ your library™					

Resources to help with team marketing efforts.

- "MEDIA TRAINING GUIDE FOR SMART INVESTING@YOUR LIBRARY PROJECT LEADERS" at <http://smartinvesting.ala.org/wp-content/uploads/2011/08/How-to-Work-with-the-Media-2.0-Training-Guide.pdf>
- "A Blended Approach to PR in a Web 2.0 World" at <http://smartinvesting.ala.org/pr-webinar/>
- Tools to Connect at <http://smartinvesting.ala.org/building-awareness/>
 - Multimedia Downloads: Multimedia for Publicizing Programs at <http://smartinvesting.ala.org/building-awareness/media-tools/>
 - Scripts, Documents & Plans: Tools & Documents for Publicizing Programs at <http://smartinvesting.ala.org/building-awareness/pub-tools/>

Left out Merchandising?

Why? Because you already started...kits distributed with materials and resources.

What is merchandising?

Systematic process of effectively positioning, presenting, and displaying library products

- Traffic-way,
- Point of Purchase
- Point of Use

Attention to place and presentation!



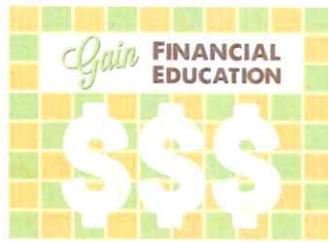
Questions



Thanks for Participating
and
Thanks to



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Nebraska Library Commission,
The Atrium, 1200 N St., Suite 120
Lincoln NE 68508-2023,
402-471-3434, FAX 402-471-2083
e-mail: maryjo.ryan@nebraska.gov



Communication: Getting the Word Out about Customer Training

Know Your Community

Exercise for Marketing Teams

Make a list of seven to ten organizations (clubs, agencies, groups, businesses, etc.) that are potential library partners or represent potential library customers in the target audience for the training. Give special considerations to organizations that serve customers who are unserved or underserved by the library. Use your local newspaper, telephone directory, other local directories, or other appropriate resources for this assignment. Be sure to follow instructions (below) for each of the organizations you list here:

List of Organizations

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

For each of the organizations you listed above, provide the following information:

- Name, address and telephone number for a contact person in the organization.
- Connection between *Smart Investing @ your library® Builds Nebraska Communities* library services and products and benefit to their organization.
- Possible activities that would communicate—or market—the library's services and products to the organization. (For example, offsite demonstrations or training, speaking engagements, etc.)
- How would an association with this organization benefit the library?

Know Your Library

Exercise for Marketing Teams

You all know your own library pretty well, don't you? Even those of us who have worked in our libraries for a very long time can sometimes learn something new by taking a systematic look at it. Select one (or more) of the following exercises:

Guided Visualization

Try to approach this with a fresh eye. Pretend that you are a member of your target group, a person with no experience with the library. Put yourself in their shoes and record your observations as you walk up the sidewalk to the library, through the door and all through the library. Start at the street or in the parking lot. Notice the exterior signage and condition of your library. How are customers greeted when they enter the library? Is the library arrangement convenient, easily accessible? Is your library signage easy to read? Is it easy to spot library staff? Are the staff members approachable? What barriers to the library's staff and materials do library users face?

Photo Safari and Analysis

One way to really get to know your library is to try to see it through the eyes of a stranger by studying photographs of your library. Work with your team to take photographs of your library. Take the photographs from the point of view of the customer. Go outside and enter the library through the door that your customers use. Try to look at everything you see with fresh eyes and take pictures from the perspective of someone who has never been in the library before. As much as possible, it is important to analyze the photos from the point of view of someone who is not familiar with the library. Try to involve individuals who are not current library customers in this analysis.

Mystery customers

Involve others in this assessment. Involve some of the folks you identified earlier and if possible, involve people who represent the target group. Ask them to “mystery shop” the library. Ask them to critique your library photos.

What's the point of these exercises?

- Assess the curriculum and the collection as to how they will meet the needs of the target audience.
- Determine what you need to learn to sell the product (training and resources) to the target audience.

Merchandising in the Library

What is merchandising?

Merchandising is a systematic process of effectively positioning, presenting, and displaying library products and services (books, magazines, cds, talking books, videos, audio, computer access, etc.) in the traffic-way, at the point of purchase, or the point of use. It is the organization of the library—how you place materials to best serve your specific customers, how you organize your library to make it easy to find what they need.

What are the goals of merchandising?

Cut through the clutter—customers are bombarded by visual clutter.

Ease customer negotiation.

Save customer time.

Save customer embarrassment (“in-group” vs. “out-group”).

Move the product.

Hints for Library Merchandising

- Remember that merchandising is visual communication. It is not about personal taste or style. It is about following the principles of simple, clear graphic communication.
- Use bold graphics with large, crisp type. **Sans serif** type is best. Make it big and then double the size.
- Avoid all caps.
- Avoid acronyms and library jargon.
- Avoid visual clutter, the “bulletin board” look of many little items/elements clustered.
- Avoid italics, except for a single word here and there for emphasis.
- Imitate bookstores. You can copy their displays and signage. We strongly suggest “topic-specific” signs on top of shelving that holds your financial education materials.
- Beware the temptation of too many props. Edit. Use a few props and photographs (or enlarged book covers) as backdrop and then stack up the books (face-out) with a note (call-to-action) that says:

**Take these books.
Check them out now.
Tell your friends.**

- Take advantage of impulse pick-up.
- Change displays every month or more often.
- Cover all surfaces as much as possible, increasing merchandise intensity.
- Use cross-merchandising. For example, a financial education display featuring books, magazines, videos, cds, free copies of brochures, training registration sheets, and printouts of our **NebraskaAccess** list of **Money and Investing** Internet sites (nebraskaccess.ne.gov/moneyandinvesting.asp).
- Think of each of your library departments as a shop within a store. Use visual cues to direct people to the shop within a store. Copy the way department stores do this. Use the flooring, walls, flags, signs, etc.
- Good merchandising moves goods quickly. Consider it a success if you have to keep replenishing it!
- Check out Republican Valley Library System Director Denise Harders Pinterest Board for displays related to finance and money at <http://www.pinterest.com/repvalley/displays-about-finance/>. She will continue to add to it. Please share photos of your merchandising efforts so the Pinterest Board continues to grow.

Smart Investing @your library® Builds Nebraska Communities Event Planning Form

Event		Date
Location		Staff Contact
Planned Attendance	General Public	Stakeholders/Partners

Program		
Performers/Speakers Involved	Cost	In-kind Services
	Contract Signed? <i>NLC Contract signed w/ UNL Extension Educators/trainers</i>	
Performer Contact Info:	Phone	Email
Room Set-up:	Tables/Chairs/Etc.	Format

Technical What is needed?	Sound equip. needed	Who will provide and operate?	Cost
	Projector/Laptop/Screen	Who will provide and operate?	Cost
	Other	Who will provide and operate?	Cost

Publicity/Advertising Who will create and distribute?	Poster		Cost
	Newspaper	Date Sent	Cost
	Library Website	Date Sent	
	Radio	Date Sent	Cost
	Other		Cost

Refreshments What is needed?	Food	Who will provide?	Cost
	Drinks	Who will provide?	Cost
	Napkins/plates/tableware/etc.	Who will provide?	Cost

Supplies	Special program needs	Who will provide?	Cost
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Final Attendance	General Public	Stakeholders/Partners	Total Cost	
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Follow Up With Partners/ Stakeholders & Speakers	Thank you:	Discuss opportunities for partnering:
	<input type="checkbox"/> Note <input type="checkbox"/> Call <input type="checkbox"/> E-mail	<input type="checkbox"/> Volunteer <input type="checkbox"/> Training <input type="checkbox"/> Funding <input type="checkbox"/> Other

Communication Strategy Menu

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Persons Responsible	Results
<p>Outreach</p> <p>Share the message directly. Go where the customers are. Partner with organizations.</p> <p>Speaking engagements</p> <p>Interview shows</p> <p>Sponsorship of community events/activities</p> <p>Offsite seminars</p> <p>Offsite workshops</p> <p>Service club memberships</p> <p>Other club memberships</p> <p>Offsite delivery of library services</p> <p>Offsite demonstrations</p> <p>Offsite displays</p> <p>Other</p>					

Communication Strategy Menu

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Persons Responsible	Results
<p>Word of Mouth Create Word of Mouth: Talking Points and Fact Sheets</p>					
<p>Online and Social Networking: Creating the Buzz: Library/Partner Website Library/Partner Facebook Library/Partner Twitter Library/Partner YouTube</p>					
<p>Other</p>					

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Person Responsible	Results
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Paid Advertising

Radio

Television

Outdoor billboards

Direct Mail

Letters

Newsletters

product/service announcements Flyers

Postcards

"Special customer" offers

Brochures

Direct response

Coupons

Bill stuffers

Other

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Person Responsible	Results
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Collateral (not as powerful as people)

Print:

Newspaper

Magazines

"Shoppers" (free or classified ad magazines)

Yellow Pages

Special directories (regional, seasonal, Chamber)

Trade or industry directories (e.g., *Thomas' Register*)

Cooperative ad support from your library vendors

Flyers

Posters

Handouts

Other

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Person Responsible	Results
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<p>Public Relations News releases Articles in magazines, journals, etc. Open houses, coffees, etc. Other</p>	<p>One-On-One Selling Presentation materials Personal letters Customized proposals Telemarketing Library personnel training Other</p>
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Strategy	Library Customer Target	Ideas for Our Library	Target Date	Person Responsible	Results
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Sales Promotions Discounts Loss leaders Coupons "Buy one fine, get one free" Other		Specialty Advertising Credit Card Flash Drives Matchbooks Key-chains Novelties Calendars Datebooks Bookmarks Other			
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Communicate about:

Financial Education Event at the library

Audience	What	Who	When	Results
Adults: 20s and 30s	Business Cards	Circulation Staff/vol.	Every day f/ 1 month	50% more workshop participants