

Suggestions from Educators For Working with Employers

- At the initial planning session, in addition to going through the Planning Checklist, discuss how the company handles employees who have financial issues that spill over to work. Educational sessions may generate “calls for help” from employees. Agree upon a way these can be handled.
- At the planning session, ask the HR representative whether the company has had recent changes in benefits or whether changes are anticipated. How do employees feel about the changes? How might their feelings affect their attitude toward the Money Crunch program? Refer to the end of the planning checklist for additional questions to ask at the planning session.
- As much as possible, engage the employer or HR representative in program planning and delivery.
- Arrange for an HR professional or representative of the company’s pension or 401(k) plan to attend the sessions dealing with employer-sponsored investment opportunities.
- Send reminders a day or two before the first session is scheduled to make sure that the HR representative remembers and to review what each of you has committed regarding preparation.
- If the company’s worksite is secured, make sure you know the process for getting into the worksite.
- Provide a small gift to the HR representative—a mug or pen from your organization perhaps.
- Provide a certificate of recognition to the company for its participation and outstanding support of its employees. Present the certificate at a local Chamber of Commerce meeting.
- Offer to send an article about the company’s offering the program to the business pages of the local newspaper.
- When you teach a program, ask the HR representative for a “testimonial” letter or permission to have HR reps of other companies considering the program phone about the program.
- When you do training at one company, ask the employer it’s OK to invite HR representatives from other companies to attend so that they can become familiar with the program before they sign on.