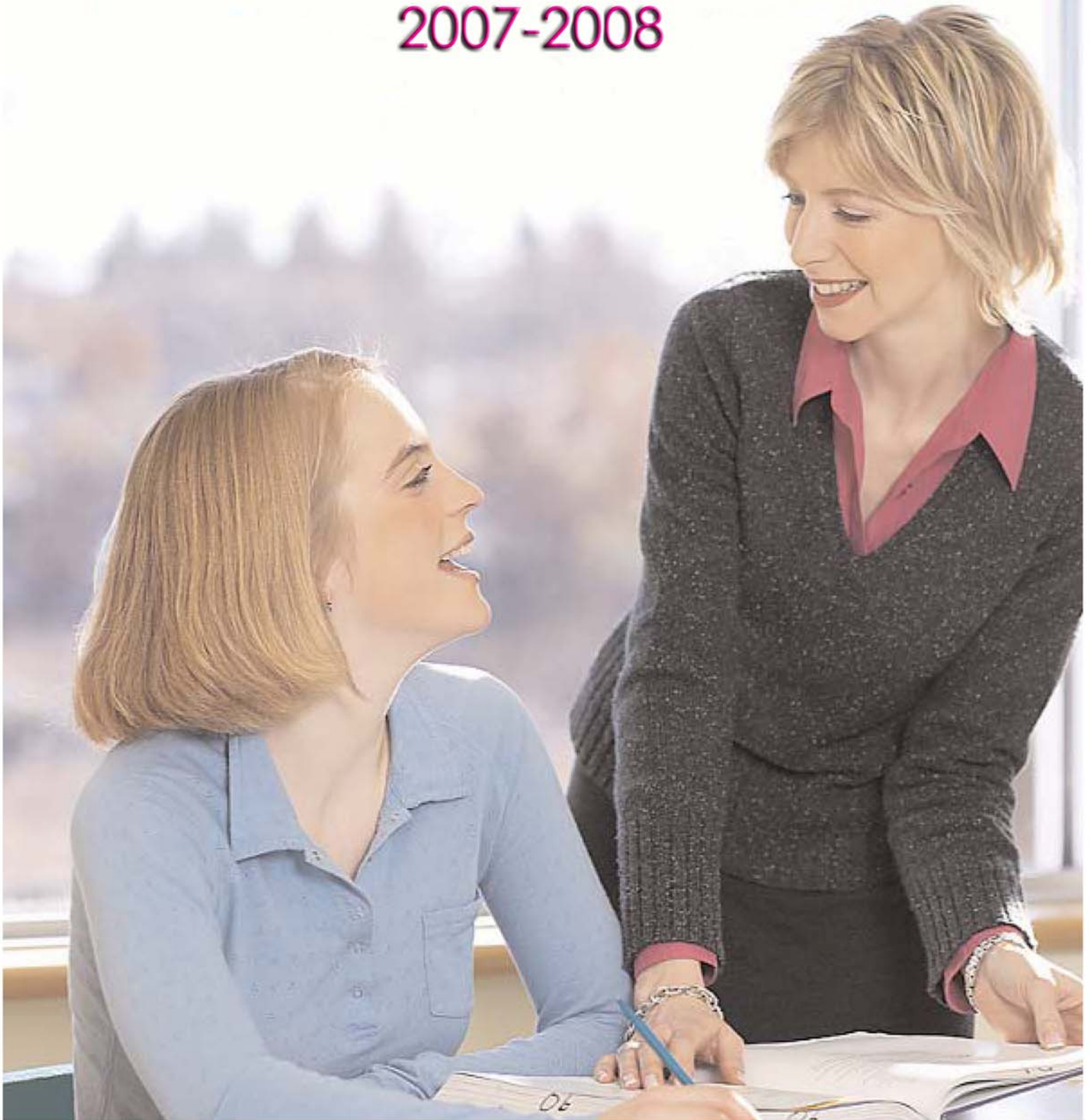




**CSCPA**

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# CPA Career & Financial Literacy Classroom Speakers Guide 2007-2008



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## Working With High Schools

As a student outreach volunteer with the high school CPA career speaker's bureau, it is important to establish good communication with the educator(s) at the school(s) in which you will be speaking.

### High Schools Today

Typically when we think of high schools we envision our local public school system. However, today there are far more choices and types of high schools than ever before. Not only are public high schools (which themselves include everything from inner city to small rural regional schools) an option, but secondary educational institutions also encompass parochial, private, independent, technical, magnet, academies, and charter schools. In addition, many students have opportunities within their schools for students to earn college credit while still in high school and work as interns for local businesses. Here's a brief description of some of these schools:

*Charter Schools* - A charter school is a public nonsectarian school organized as a nonprofit corporation and operated independently of a local or regional board of education. Charter schools offer a range of educational programs, small classes, and enhanced teacher-parent communication. (source: CTDE)

*Interdistrict Magnet Schools* - Magnet schools are public high schools designed to voluntarily reduce racial, ethnic and economic isolation. They seek to attract students from school districts by offering a special high-quality curriculum. They provide educational opportunities for students who benefit from a range of themes or teaching philosophies that include performing arts, math, science and technology, international studies, early childhood and multicultural education. Admission to these schools is open to all students in participating school districts. (source: CTDE)

*Academy of Finance (AOF)* programs aim to prepare students for post-secondary education and careers through academic learning and hands-on work experiences within a theme-based, contextualized curriculum. Students are exposed to broad career opportunities in the financial services industry, creating new options for the future. Also as part of the curriculum, students are required to complete an internship. (source: NAF)

*Independent schools* are private, nonprofit schools governed by elected boards of trustees. Strong emphasis is placed on mastery of basic skills - reading, writing, mathematics, and the arts. Tuition and other fees range from a few thousand dollars at some elementary day schools to over \$20,000 for boarding schools. (source: CAIS)

*Vocational/Technical High Schools* - Public high school where students receive a Connecticut high school diploma as well as a certificate in a specific trade technology. Tech high schools aim to assist students in finding employment upon graduation and/or seeking a post-secondary education. (source: CTTECH)

*Connecticut's Tech Prep Program* consists of at least two years of secondary and two years of post secondary education and leads to an associate degree or a bachelor's degree in a specific career field; established upon the signing of an articulation

agreement between a specific high school and/or vocational-technical school and specific college and/or university. (source: CTDE)

### **Class Schedules**

The "typical" school day runs from about 7:30 a.m. – 2:30 p.m. with most class periods lasting about 45 minutes. Some schools use rotating schedules so each day a class may be held at a different time. Also, some schools use "block scheduling" which means a class period may be as long as 90 minutes but only meets 2-3 times a week.

Try to arrive about 10-15 minutes before your scheduled start time. Often you will check in at the main office and perhaps be escorted by a teacher, student, or security personnel to the class.

Business or business casual dress is fine. You should dress the way you normally dress for work.

### **Contacting the Schools**

In order for school visitations to take place most efficiently, making a strong initial contact with a school is important. With the Society's student outreach program firmly in place, you will most likely be working off of requests sent to the CSCPA Student Relations Specialist, who in turn will disseminate a request to you based on your location preferences. Your job will be to follow up on the request and contact the teacher via email and/or phone. You may wish to include the following in your introductory conversation:

- Introduction of yourself
- Explain that you are a volunteer CPA with the CSCPA career speaker outreach program and that you are following up on the request sent to the Society.
- Ask questions such as what times/days the class(es) meet, what the teacher would like you to discuss, how many students there are, what they are currently covering in class, etc. and arrange a mutually convenient time for your visit.
- Most often your contact at the school will be a business/accounting teacher or a career or guidance counselor.
- If a teacher/school is unresponsive to your correspondence, the general rule of thumb is to follow up again in two weeks with a phone call. Often the best time to reach a teacher is at about 2:30 when class is over.

\*\*\*Important -- Once you have scheduled or completed a speaking engagement at a school, please let Jill Brightman, CSCPA Student Relations Specialist know by contacting her with a quick email ([jillb@cscpa.org](mailto:jillb@cscpa.org)) or phone call 800-232-2232, ext. 239.

## High Schools Students Today....Some Perspective

When addressing teenagers and in order to better connect with them, it's valuable to try to see their view of the world. Enclosed are some items from the annual "mind set list" that may help put into perspective the world that today's teens have grown up in.

### For those born in 1987 or after:

(From the Beloit College's Class of 2009 Mindset List)

[http://www.jumbojoke.com/beloit\\_colleges\\_2009\\_mindset\\_list\\_481.html](http://www.jumbojoke.com/beloit_colleges_2009_mindset_list_481.html)

- Boston has been working on the "The Big Dig" all their lives.
- They don't remember when "cut and paste" involved scissors.
- Pay-Per-View television has always been an option.
- Voice mail has always been available.
- Iran and Iraq have never been at war with each other.
- Al-Quaida has always existed with Osama Bin Laden at its head.
- The federal budget has always been more than a trillion dollars.
- "Whatever" is not part of a question but an expression of sullen rebuke.
- They may have fallen asleep playing with their Gameboys in the crib.
- For daily caffeine emergencies, Starbucks has always been around the corner.
- They do not remember "a kinder and gentler nation."
- Money put in their savings account the year they were born earned almost 7% interest.
- Bill Gates has always been worth at least a billion dollars.
- American Motors has never existed.
- They learned to count with Lotus 1-2-3.
- They have grown up in a single superpower world.
- They never saw the shuttle *Challenger* fly.
- They never saw Pat Sajak or Arsenio Hall host a late night television show.
- Digital cameras have always existed.
- Tom Landry never coached the Cowboys.
- They have always been challenged to distinguish between news and entertainment on cable TV.
- "America's Funniest Home Videos" has always been on television.
- Pixar has always existed.
- They never saw a Howard Johnson's with 28 ice cream flavors.
- Jimmy Carter has always been an elder statesman.

For today's 17 year-olds - - those born in 1990

- The World Wide Web/Internet protocol (HTTP) and WWW language (HTML) has always existed.

## How to Give a Dynamic Presentation

Here are some tips for a successful presentation:

- Before the presentation, talk to the teacher about the class, student interests, etc. **Communication is key.**
- **Personalize your presentation** as much as possible. Students like to hear stories about your experiences rather than just the facts about 401(K)s or compounding interest. [Note: Stories involving fraud, crime, celebrity, etc. often go over very well with students.]
- Make your talk as **interactive** as possible by including the students in your presentation. Start off with an icebreaker, provocative question, or an unusual fact or story related to current headlines that you can tie into your broader discussion on financial literacy.
- **Ask students questions.** Perhaps go around the room and ask them their names, what kind of career they are interested in, etc. Try to get them involved in the conversation by discussing topics familiar to them such as school, part-time jobs, music, etc.
- **Narrow your focus** to a few easy-to-understand points that they can relate to and have fun with, rather than telling them everything you know about the accounting profession.
- When answering student questions always try to **emphasize the positive.** There are negative aspects to every profession and our role is to not only help better educate students about the importance of fiscal responsibility but also to help to positively promote the diversity and opportunity available in the CPA profession.
- When possible visual aids and **little giveaways** (pens, small items with company logo, etc.) can really be of help with students.
- Use any materials (power point, etc) you feel comfortable with and **create a format that suits YOU.**
- **Relax!** Try to keep your tone conversational and non-threatening. Don't be monotone or speak as if you are reading directly off of a piece of paper.
- **Be yourself.** Smile often, maintain eye contact, and don't take yourself too seriously. Have fun!

## Some Dos and Don'ts

### DO.....

- *Treat students with respect and speak to them as young adults.* This doesn't mean using lots of jargon or introducing concepts that may be beyond their knowledge base, but just not speaking to them like they are still in junior high school.
- *Stay positive.* Most professions have such things as busy seasons, long hours, continuing education, etc. and the students will encounter negative aspects of the working world soon enough. Try to discuss the positive aspects of your career choice.
- *Be Honest* in your answers and never lie to students. It's important to be sincere in your comments. If giving an honest answer appears negative, try to also balance it with the positive side.
- *Stay in your own comfort zone.* Students may on occasion ask a question that makes you uncomfortable. The most common is asking about your salary. If you are not ok with giving that information, you don't have to. You can answer the question by providing a general salary range based on experience.
- *Utilize your own knowledge base and your own good judgment!*

### DON'T.....

- *Prejudge the students based on school location or economic factors.* Even though teens are essentially the same, every school and every class is a different experience. A bad experience with one school, teacher, or student should not prevent you from speaking to other students, classes or at similar schools.
- *Lecture.* If there's one thing students detest, it's monotone lectures! You are much better off getting students involved, asking them questions, calling on people, or handing out little "rewards" (pens, etc.) for those who ask questions, or answer a question correctly.
- *Call the students "children".* "Students" or even "kids" are fine, but calling them "children" can come off as condescending.
- *Try to act cool or say, "I'm not your typical CPA."* This is a mistake because even if you are the coolest, you can look foolish when you

are trying too hard to be "all that." Second, saying you are not a typical CPA can sound like a put down to the profession and hence, make it seem unappealing.