

Project / Beneficiary Title: **Vocational & Life Skills Training Program**

1. Briefly describe the project. What will be done, when and where will project activities take place, and who will be the beneficiaries?

The Irvine Rotary Club will develop a series of vocational and life skills training workshops, to prepare college-aged persons in our community for better career and life management decision making.

We will deliver vocational skills training in the format of at least one Vocational / Career Skills Summit Day. This summit will stage a series of skill-set trainings provided by Rotarians of the Irvine Rotary Club, various Rotary clubs in District 5320 district, human resource, business professionals and professionals from other relevant occupations.

The event will provide training in the areas of:

- 1) Mock-Interviews train students regarding proper attire- responses to interview questions, presentation, etc.
- 2) Instructing students on networking and proper questioning techniques for Informational Interviews-which is questioning someone in their potential field of study-to learn about a particular profession
- 3) Discussion around the value of volunteering and strategies for acquiring internships
- 4) Face-to-face networking and communication skills
- 5) Effective resume creation
- 6) Networking online (LinkedIn and other tools)
- 7) Creating a brand for yourself (learning to identify yourself and your strengths as a base)

Beyond the 1-Day Summit, the Irvine Rotary Club will extend its collective knowledge in the development of a series of financial skills workshops aimed at preparing project beneficiaries to make good financial decisions. The club will do this by aggregating and customizing materials from banks and other financial institutions, and incorporating viewpoints of mortgage lenders, investment advisors, real estate professionals, insurance advisors, accountants and trust/estate planning attorneys.

Workshops will be offered in 50, 60 or 75 min workshops on the following topics, presented by members of our club in relevant vocations or with relevant experience, or by professionals in our networks that volunteer with us to be facilitators of the training:

- Creating and Managing a Household Budget
- Smart Credit and Debt Management
- Buying Your First Home
- Investment Workshop (Basics, Retirement, College Planning)
- Insurance & Asset Protection
- Wills, Trusts and Estate Planning
- Other sessions, or combinations thereof, as need may determine

Beneficiaries of the first stage of the financial skills program will be young veterans and other students recruited to participate by the Irvine Valley College Veteran's Center, Brandman University (heavy veteran population), and Working Wardrobes (as part of their return-to-work programs). Workshops may be offered in a classroom or other training room on the campus or in off-campus locations, such as training rooms in executive/professional/non-profit office buildings. Beyond the first stage, beneficiaries will be young veterans and emerging professionals that sign-up for the workshops via collegiate, community, and non-profit partner websites and publications.

2. What opportunities do you foresee to make this project more impactful over time than you have described above.

Through documentation of our activities and new partnerships, Vocational Skills Summits can become a semi-annual or quarterly offering of our club and we can train others on delivery of the same topics such that collegiate clubs and other organizations can leverage summit content.

Stage 1 of the financial literacy component comprises the design and pilot the program in partnership with Irvine Valley College Veterans Center, Brandman University, Veteran's First, and Working Wardrobes. Stage 2 will involve modifying materials for non-college audiences (e.g., teens, young adults, displaced families) based on feedback gathered in Stage 1, and expansion of

the program. Stage 3 will involve building awareness and then distribution of a turnkey financial literacy project to all Rotary Clubs in the United States. Finally, there are opportunities for non-Rotarians in financially oriented programs to be recruited initially as volunteers, use the project as a social responsibility effort for their businesses, and then transition into Rotary as new members.

3. How many Rotarians will participate in the project?

We anticipate that at 15-20 Rotarians will be involved in the planning and delivery of content at the Vocational Summit.

At least 46 of the 70+ Rotarians in the Rotary Club of Irvine currently have vocations that would be well suited for involvement in the financial literacy component of this project. We anticipate that most will take advantage of the opportunity to get involved in this project.

Financial Planners / Investment Advisors (5), Insurance (2), Accountants (5), Mortgage Consultants (3), Real Estate (3), Senior Bank Officers (1), Trust Attorneys (2), Project / Budget Managers (8), Business Owners (12), Educators / Education Administrators (5).

Beyond our club, there are expansive opportunities for Rotarians around the District and nation to adopt and be involved in the longer-term implementation of this initiative.

4. What will Rotarians do to participate?

Rotarians will participate in small group project sub-committees to design curriculum and materials. Rotarians will recruit and train other Rotarians and non-Rotarian professionals in their vocational networks to lead training sessions.

Rotarians will create and coordinate project resources, including (1) design, printing and distribution of curriculum, train-the-trainer, and marketing materials, (2) arrangement of training facilities, and (3) management of trainer/workshop schedules, and (4) creation of an attendee feedback system.

Rotarians will identify and communicate with external project partners (e.g., collegiate administrators) to identify and inform beneficiaries of the opportunity to participate in the program.

Rotarians will solicit project sponsorship dollars from financial institutions and develop public interest articles for dissemination to local press outlets and community publications.

5. How many non-Rotarians will benefit from this project? List beneficiaries and how each will benefit.

At the first Vocational Summit, we expect to host up to 90 students.

Potentially, hundreds of persons will benefit directly from Stage 1 of the project, as will professionals that provide related services to these persons. Once the program is refined and modified as a turnkey Rotary project, thousands of persons may benefit.

6. What are the expected long-term community impacts of the project, and what can be done to make this project more self-sustainable?

By addressing financial literacy, we build a stronger long-term economy and build skill sets that young veterans and emerging professionals need to sustain their lives. Project sustainability will be attained by developing a turnkey system that our Rotary club and other clubs can adopt in their own communities. Furthermore, as the program grows, we will seek sponsorship of financial institutions and other businesses.

7. If a cooperating organization will be involved, what will be its role?

Irvine Valley College will provide facilities for the summit and the first workshops. Working Wardrobes also has facilities that could be used. Both of these organizations and others (Veteran's First, etc.) will help disseminate information about the workshops and post the opportunities on their organizational calendars.

8. How will you, the club, and others raise funds from non-Rotarians to fully or partially support this project?

