



Guidelines for participation in “Financial Education Month” - October 2020 and procedures for granting of use of the official logo of the initiative

The Committee on the Planning and Coordination of Financial Education Activities promotes from 1 to 31 October 2020 the third edition of “Financial Education Month”, with information and awareness-raising activities and events on financial, insurance and social security education.

Why participate in “Financial Education Month”?

Participation in “Financial Education Month” allows you to take part in the major national event on financial, insurance and social security education of Italy, now in its third edition.

Partners who participate are allowed to use the specific logo that distinguishes the annual edition of the “Month” and to be included in the official calendar of the event on the www.quellocheconta.gov.it portal, taking advantage of various promotion activities at national and local level, designed by the Committee for all the events in the calendar.

Who can participate in “Financial Education Month”?

“Financial Education Month” is a project open to:

- Central and peripheral public administrations;
- Non-profit institutions, such as trade associations and professional associations, foundations, schools, universities and research centres, non-governmental organisations (NGOs), consumer associations, cultural associations, teacher/parent associations;
- Private organisations and companies, including operators in the insurance, social security and banking-financial sectors, excluding
- individuals, individual professionals and sole proprietorships, which propose initiatives in line with the participation criteria indicated below.

To maximise the effectiveness of the initiatives and to avoid duplication of efforts, as well as to ensure an adequate dissemination of the activities throughout the national territory, the Committee may intervene to better coordinate the initiatives of the applicants, facilitating synergies and collaborations between them, as well as supporting their communication in an integrated and coherent way.

Which initiatives are eligible for inclusion in the official calendar of “Financial Education Month”?

Eligible for applications are in-person events or online events held from 1 to 31 October 2020 that, in response to these Guidelines, are considered by the Committee to be of institutional importance, of certain social utility and in line with the National Strategy for financial, insurance and social security education and with the Programme available on the www.quellocheconta.gov.it website.

The promoters of the initiatives will be able to submit their applications from 10 June to 30 September 2020, using the appropriate online form available on the www.quellocheconta.gov.it website.

The proposed initiatives, presented independently or in collaboration with other applicants, may include, by way of example:

- training programmes dedicated to specific segments of the population: young people, women, the elderly, small entrepreneurs, workers, migrants;
- conferences, seminars, events, days/weeks for financial, insurance and social security education or other communication projects;
- cultural initiatives (e.g., shows, guided tours, thematic exhibitions, etc.) to raise awareness on the issues of financial, social security and insurance education.

In the calendar, also in light of the context deriving from the current health emergency, in addition to in-person events that comply with the norms in force on health safety being eligible, remote events are also eligible (in streaming or through the various video-conference platforms available on the market), allowing them to be followed via Internet, through the most recent browsers, through platforms that don't require subscription or payment services.

The platform used for remote events must allow the participation of a minimum of 50 connections simultaneously.

Themes at the centre of the 2020 edition:

For the 2020 edition, the applicants are in particular invited to organise initiatives also aimed at increasing the financial, insurance and social security skills helpful for better dealing with the personal and family financial choices in this period of the COVID-19 emergency, as well as initiatives in the context of social security education: these two themes will indeed be at the centre of the 2020 edition.

Social Security Education Week - 26-31 October 2020

In the context of the 2020 edition of “Financial Education Month”, particular attention will be paid to social security themes, with Social Security Education Week. The initiative, in its first edition, was created with the aim of increasing the social security culture of citizens, promoting a better understanding of the functioning of the Italian social security system, both mandatory and complementary. Interested applicants are therefore invited to plan events and initiatives on the themes of welfare in the last week of October, on the occasion of Social Security Education Week.

The applicant’s responsibilities in organising events

The applicant must be able to organise and promote the event (in presence or online) independently, with its own resources and using its own means, including its own platforms.

The applicant undertakes, under its sole responsibility, to promote and carry out the initiatives in accordance with current legislation, including - by way of example - rules on workplace safety and the processing of personal data.

In particular, in the impossibility of knowing - at the time of publication of these Guidelines - if and how in-person events will be made possible through Government and Regional provisions concerning health prevention, the applicant hereby undertakes to ensure that any in-person events are executed in full compliance with the measures for public health protection provided by the national and local authorities or by the employer who promotes the initiative.

Participation criteria

The initiatives recommended by the applicants must follow the following criteria.

1. Free of charge and without conflicts of interest

In order to participate in “Financial Education Month” the proposed initiatives:

- must not be commercial in any way and must not pursue promotional or advertising purposes;
- must not provide for charges to be borne by the final recipients or by the Committee, not even in relation to the purchase of licenses or software in the case of online events.

The content and format of the material provided during the “Financial Education Month” initiatives must guarantee objectivity, that is, they must not be attributable to any commercial purposes of the applicants. In particular, the information materials related to the initiative and disseminated to participants must not advertise paid products or services. The visibility of any brand, logo or reference to the applicants, even if permitted, must be reduced to the minimum.

2. Quality of the resources and trainers

The proposed financial, insurance and social security education materials must be developed in the interest of the recipients and must be:

- provided to participants free of charge;
- suitable for the social, economic, cultural and linguistic context in which they will be disseminated and appropriate to the knowledge level of the recipients;
- accurate and up-to-date;
- easily accessible also to people with disabilities;
- developed without the use of technical terms and jargon, unless these are appropriate for the intended audience.

The speakers/trainers/trainers involved in the initiatives must:

- have proven adequate knowledge of the topics covered;
- have teaching skills adequate to address the target audience, in particular to children and young people (inside or outside schools);

- in the event of initiatives carried out in cooperation with schools, work under the supervision of teaching staff, also in the case of online events.

Procedures of granting of use of the logo and inclusion in the “Financial Education Month” calendar

All proposals to participate in “Financial Education Month” must be received through the appropriate online form available on the www.quellocheconta.gov.it website and they must comply with these Guidelines.

At the end of the registration process and following the communication regarding the admission of the initiative to the 2020 edition of “Financial Education Month”, the applicants will receive authorisation for the use of the official logo of the initiative - which will be sent to the contacts provided in the online form - and the initiative will be published in the calendar of the “Month”.

The logo of the event cannot be modified and it can only be used by the authorised party and strictly for the period and the activity/event in the “Financial Education Month 2020” calendar.

The logo can be used together with the logos of the applicant, but it must be graphically independent, not confusing and not associated with any other logo.

The logos of the event's participants remain the property of their legitimate owners, who grant the right of use to the Committee for the purposes of sponsorship also successively at the end of the event and, in particular, for the activity of sponsorship and promotion of the edition of the “Financial Education Month”.

The Committee reserves the right to monitor the materials of “Financial Education Month” and the websites of the applicants, reminding them of the correct use of the logo if required. The reproduction and use of the logo in ways that differ from what is prescribed involves the immediate cancellation from the official calendar of the “Month”.