EDUCATIONAL MEETING SCENARIO WITH LIBRARY USERS FOR LIBRARIANS-EDUCATORS
INHERITANCE
MODULE NO. 5 / ADVANCED LEVEL OF THE COURSE

--->>> If you will conduct an educational meeting in a stationary mode, use this version of the scenario prepared in black.

--->>> If you are conducting an online educational meeting, use the methodological guidelines prepared in blue.

This is the scenario of a stationary educational meeting on financial education for final recipients, i.e. residents of the commune / region - library users. The scenario is adapted to the corresponding online course module located on the FINLIT platform: https://finlit.eu.

Therefore, financial education in the library will take place in a mixed learning formula. During the on-site training for library users, online educational resources will be used on the FINLIT e-learning platform.

The scenario proposes the use of adult learning methodologies according to David Kolb's concept. The scenario supports the leaders and provides them with methodical inspiration for educational work with library users. Using this scenario, the librarian who had previously completed the training for financial education trainers will conduct an educational meeting.

As an online meeting leader, use the functionality of your chosen remote working platform to guide your course participants through the training content of the module. Participants will also be able to perform certain activities stationary at their place of stay during the online meeting (i.e. they will be able to perform short tasks on their own according to the instructions provided by the teacher, e.g. "write some of your associations with inheritance/ will etc. on a piece of paper and read your answers to other course participants").

Participants will also take part in various online activities proposed by the trainer, such as speaking in front of the camera, asking questions, commenting/ answering in a chat, participating in surveys, working in virtual rooms, performing short tasks alone or in a group. During the online training, educational materials and short exercises from the course screens on the e-learning platform of the FINLIT project will be used.

Caution:
The stages of the educational meeting have been planned for several hours. It may be too long for one educational meeting with the locals. Therefore, you can choose from among the substantive stages and decide which of them you will eventually complete during an educational meeting with a group of participants. It all depends on the specific age group of the students and their personal needs in terms of the knowledge contained in the module and interest in the topic.
Remember, however, that if you decide to carry out a selected stage of the educational meeting - make sure to guide participants through the entire activity described in this stage (do not shorten a given stage of the meeting and do not select only individual parts from it!).
Try to complete all 4 stages of the Kolb cycle, such as: experience, reflection, knowledge / theory and application / implementation) described in the scenario. It is important that the goal of a given stage of the meeting that you carry out with the participants is achieved while maintaining the principle of adult learning in accordance with the Kolb cycle proposed in the scenario.
After selecting the stages of the meeting that you plan to carry out with the participants, do not forget to plan two breaks (15 minutes each) between each stage of the meeting.

TITLE OF THE EDUCATIONAL MEETING

INHERITANCE

EDUCATIONAL GOALS OF THE MEETING

1. Raising the level of knowledge about compiling a personal list of important documents.

2. Raising the level of knowledge about statutory and testamentary inheritance.

3. Acquiring skills in preparing a will.

4. Raising the level of knowledge on how to accept inheritance.

STAGES OF THE MEETING

STAGE 1 (approx. 10 min) - Welcoming the participants, getting to know each other

STAGE 2 (approx. 40 min) - How to prepare for the transfer of property?

STAGE 3 (approx. 40 min.) - Statutory and testamentary inheritance

STAGE 4 (approx. 50 min) - Testament

STAGE 5 (approx. 30 min) - Acquisition of inheritance

STAGE 6 (approx. 10 min) - Summing up and closing

STEP-BY-STEP DESCRIPTION OF THE EDUCATIONAL MEETING

STAGE 1

1.1 Name of the stage: Welcoming the participants, getting to know each other.

1.2 Educational purpose of the stage:

a) getting to know the participants of the educational meeting

b) integration of participants, establishing training rules

c) Introduce the goals and topic of the meeting and the benefits for the participants

1.3 Organizational issues:

1.3.1 Planned time for activity: 10 min.

1.3.2 No. of slides in an online course: the initial online course screens with a description of the module objectives and a screen with the course content structure.

1.3.3 Required materials to conduct the educational meeting: sheet with the topic and objectives of the meeting (created before the meeting), sheet with the rules of the meeting (created with the group).

1.4 Activity (description and additional comments):

1.4.1 Say hello to the participants. Introduce yourself briefly, but in such a way that participants know that you are the right person to lead the meeting. You can additionally cite some detail that connects you with the group (place of birth, upbringing, place of residence of grandparents/ parents). Thank the participants for coming. Introduce the topic and agenda of the meeting. Prepare a flipchart with the title and agenda in advance, place it in the room so that it is visible throughout the meeting and refer to individual points at the appropriate moments (preferably stick the sheet to the wall).

Access the initial screens of the online course with a description of the objectives and structure of the course by sharing your screen (Share Screen).

1.4.2 Ask participants to introduce themselves briefly. As part of the "ice breaker", suggest that participants when introducing themselves mention the trait that best describes them and begins with the first letter of their name (eg. Paul - positive, Elka - eloquent).

Such a presentation gives each participant the opportunity to speak in the forum and reduces the tension at the beginning of the meeting.

Suggest a short exercise taking into account the technological mobility of the participants:
(1) on the online whiteboard - participants write their name in color and attach a symbol using the available tools of the whiteboard or
(2) write in chat - give their name along with the character trait, starting with the first letter of the name, e.g. Ala - active, Piotr - positive.

STAGE 2

2.1 Name of the stage: How to prepare for the transfer of property?
2.2 Educational purpose of the stage:
a) raising the level of knowledge on compiling a personal list of important documents
2.3 Organizational issues:
2.3.1 Planned time for activity: 40 min.
2.3.2 No. slides in an online course: Chapter no.1 online course.
2.3.3 Required materials to conduct the educational meeting: LIST OF IMPORTANT PROPERTY DOCUMENTS
(to be printed out for participants, the list is attached at the end of this scenario).

2.4 Stages of the Kolb cycle (description and additional comments):
2.4.1 Experience
Introduce participants to the topic of the module. Ask if they have had any experience with the topic of inheritance and transfer of property.
Invite the participants to read the content on the screens of chapter 1 of the course module, in which the LIST OF IMPORTANT PROPERTY DOCUMENTS is discussed.
During an online meeting, you can ask volunteers to share their screen and read the course content aloud to all participants.
It can be done by 2-3 people, several slides each.

Give the most important reasons for creating a LIST OF IMPORTANT DOCUMENTS AND A SEGREGATOR WITH THE MOST IMPORTANT DOCUMENTS, such as:

  (1) gathering all your documents and property information in one place,
  (2) ordering property issues in the event of death,
  (3) making it easier for the closest people to act in emergency and emergency situations (illness, hospitalization, departure or death),
  (4) avoiding problems with inheritance, which often result from the fact that it is not fully known what the deceased person had in terms of goods, especially in terms of liabilities, e.g. loans, private debts,
  (5) protection of our rights when we list loans granted by us to other persons, their amount and the date of return.

Explain that one of the important documents, such as the EMERGENCY MANUAL, is especially useful for people living alone and should contain:
  (1) contact details of relatives,

(2) doctors' data,

(3) a list of medications that a person takes on a regular basis,

(4) our wishes for a funeral and burial place.

Then invite participants to work individually and hand out the printed LIST OF IMPORTANT ASSET DOCUMENTS.

Ask them to try to compile their list of key documents - first, analyze the proposed list and add to it the missing documents that they think would be useful.

Then ask 2-3 willing people to share with the group what they have added to their lists.

Emphasize that the list and the binder with the documents on the list will contain sensitive data and it should be ensured that unauthorized persons do not come into their possession.

In the online meeting, you can send the file "LIST OF IMPORTANT ASSETS" via chat. The task of the participants will be to download the file to their computer. Then each individual verifies the list and checks the documents contained therein and supplements them with those that would be useful in their case. After the end of the exercise, a few people are willing to exchange the documents that have been added to the list.

2.4.2 Reflection

Say that inheritance is a very life topic that has a big impact on family relationships, unfortunately often negative.

We talk about this topic on purpose to make it more common, "tame".

Inheritance in the legal sense is to ensure the continuity of private property.

Divide the participants into 3 people. groups. Ask them to talk about inheritance and its psychological aspects:

Is the issue of inheritance difficult or easy for them?

Can they talk freely about it or do they prefer to avoid it?

Ask 1 or 2 people to share their findings from the group chats.

You can allow participants to discuss in groups by inviting them to Virtual Rooms (Breakout Rooms).

2.4.3 Knowledge/ theory

Invite participants to view the online course slides and answer the knowledge testing questions on the course screens.

During an online meeting, you can ask volunteers to share their screen and read the course content aloud to all participants.

It can be done by 2-3 people, several slides each. Everyone tries to do the task on their own computer.

2.4.4 Application/ deployment

Invite the participants to calmly review the list of important documents that they created during the meeting at home

and try to complete the documents in a binder or organize the items on the list.

Tell that each person who worked at the meeting on the LIST OF IMPORTANT ASSET DOCUMENTS sent by the chat saves

this document on their computer to come back to it again after the meeting and complete it at their leisure.

STAGE 3

3.1 Name of the stage: Statutory and testamentary inheritance.
3.2 Educational purpose of the stage:
a) Raising the level of knowledge about statutory and testamentary inheritance.
3.3 Organizational issues:
3.3.1 Planned time for activity: 40 min.
3.3.2 No. slides in an online course: Chapter no. 2 online course.
3.3.3 Required materials to conduct the educational meeting: computer, projector.

3.4 Stages of the Kolb cycle (description and additional comments):

3.4.1 Experience
Invite participants to read the screens of chapter 2 of the online course module to find out what is the difference
between statutory and testamentary succession?
Ask the participants: When does statutory inheritance take place?
ANSWER: Statutory inheritance applies to all situations where the testator did not leave a will, or the will he left was
invalid or the person named in the will did not want to accept the inheritance.
Ask participants: Which form of inheritance takes precedence?
ANSWER: Testamentary succession always takes precedence over statutory succession, provided that the will is
valid under applicable regulations.
Ask the same questions in the group forum and encourage them to speak to the camera. If no one is willing to speak,
give the participants the correct answers.

3.4.2 Reflection
Ask participants to share what family and property consequences the selection of each inheritance may have. Tell us that managing assets and
preparing for their transfer requires planning like any other financial matter in our lives and should not be left to other people.
Ask participants in the group as a whole what they think about the different forms of inheritance and encourage them to comment in front of
the camera.

3.4.3 Knowledge/ theory
Invite participants to work in pairs. Ask them to think about the Pluses and minuses of each inheritance option.
You can use Etherpad or Jamboard for online group work in virtual rooms (Breakout Rooms) for this exercise.
As an online meeting leader, you need to prepare in advance and then provide participants with a link to the application during
the meeting so that they can work together.

In your Etherpad document (Jamboard), write:
(1) LEGAL INITIATION - ADVANTAGES AND DISADVANTAGES
(2) TESTAMENT INHERITANCE - ADVANTAGES AND DISADVANTAGES
Each group's task is to list the advantages and disadvantages of each type of inheritance.
Then collect the answers - each group shares their screen with the document and shows their records.

3.4.4 Application/deployment
Ask the participants to discuss again in pairs which option they would choose for themselves and why - testamentary or statutory inheritance? Ask people willing to share their conclusions.
You can ask participants to save their responses in the chat. Enter the chat posting rules:
- people who are "in favor" of statutory inheritance (SI) enter in the chat: SI - i ...... (short justification),
- people who are "in favor" of testamentary inheritance (TI) enter in the chat: TI - i ... (short justification),

STAGE 4

4.1 Name of the stage: Testament.
4.2 Educational purpose of the stage:
a) Acquisition of skills in the preparation of a will.
4.3 Organizational issues
4.3.1 Planned time for activity: 50 min.
4.3.2 No. slides in an online course: Chapter no.3 online course.
4.3.3 Required materials to conduct the educational meeting: computer, projector, printed sample wills.

4.4 Stages of the Kolb cycle (description and additional comments):
4.4.1 Experience
Invite the participants to read the screens of chapter 3 of the online course module.
You can use the following questions to moderate discussions:
Does anyone present have a will or are planning to prepare one?
In what situations is it worth preparing a will?
Does a handwritten will have the same legal force as a notary will?

Explain that a personal will is more often challenged by dissatisfied family members, so every effort should be made to ensure that our will is respected and that there are no formal grounds for challenging it.

Invite participants to work in pairs.

Ask them to discuss the ADVANTAGES AND DISADVANTAGES OF A PERSONAL AND NOTARY TESTAMENT from their own perspective.

You can use a virtual flipchart for this exercise, e.g. the Jamboard application, in which you can save on separate cards:
(1) PERSONAL TESTAMENT - ADVANTAGES AND DISADVANTAGES
(2) NOTARIAL TESTAMENT - ADVANTAGES AND DISADVANTAGES
Each group in the Breakout Rooms is tasked with listing the advantages and disadvantages of each type of will.

4.4.2 Reflection

Ask 1-2 people who want to share their thoughts on working in pairs in the group forum.

Then collect responses - have each group share their screen and discuss their records.

4.4.3 Knowledge/theory

Invite the participants to go through the content of chapter 3 of the course module and solve the problem there.

During an online meeting, you can ask volunteers to share their screen and read the course content aloud to all participants.
However, each person tries to solve the task on their own.

4.4.4 Application/ deployment

Invite participants to an individual exercise, during which they will prepare a TEMPLATE FOR THEIR TESTAMENT.

The aim of the exercise is to consolidate the information that a handwritten will can only be prepared in person - handwritten, signed and dated. Suggest that participants prepare their own will at home, using a template/ template that can be found on the Internet.

Reiterate that the entire will must be handwritten, signed by the person who draws it, and dated.

You can say that you don't die from the preparation of your will, on the contrary - you live in memories forever!

You delegate the same homework assignment to participants in an online meeting.

STAGE 5

5.1 Name of the stage: Acquisition of inheritance.
5.2 Educational purpose of the stage:
a) Raising the level of knowledge on how to adopt inheritance.
5.3 Organizational issues:
5.3.1 Planned time for activity: 30 min.

5.3.2 No. slides in an online course: Chapter no. 4 online course.

5.3.3 Required materials to conduct the educational meeting: computer, projector.

5.4 Stages of the Kolb cycle (description and additional comments):

5.4.1 Experience

Ask participants if they have been in a situation where they have had to make a decision to accept or reject inheritance.

Moderate the discussion so that the conclusion appears that the decline is not only assets, but also inheritance debts,

for which the heir is responsible.

You can use the following questions to moderate discussions:

- What comes to mind when we hear the words "inheritance" or "someone got an inheritance"?

- What is really part of the inheritance?

- When do liabilities exceed assets in decline?

- Who is responsible for the testator's debts?

- What decisions can we make when we inherit the inheritance?

Say that according to the inheritance law, we can accept the inheritance directly or with the benefit of inventory,

i.e. up to the amount of inheritance debts. We can also reject the decline.

We have 6 months to decline the inheritance from the date of death of the person from whom we inherit.

 If we decide to reject the inheritance, we should also do so on behalf of minors and children who are conceived but not yet born.

We do this at the notary's office when the child is born.

Conduct an online discussion. Ask the participants the above questions, you can write them one by one in the chat.

Encourage speech to the camera. Summarize the statements.

5.4.2 Reflection

Ask participants to report on what situations you need to be especially careful when deciding whether to accept or reject inheritance.

You can use the following questions to moderate discussions:

- Is simply accepting an inheritance from a long unseen family member a good decision?

- Are we in some way protected by law so as not to be liable with our assets for the debts of the deceased?

You can use a virtual flipchart for this exercise, e.g. the Jamboard application, in which you can save on separate cards:

(1) WHEN DO I NEED TO TAKE CARE WHEN DECIDING TO TAKE A FALL?

(2) WHEN SHOULD YOU TAKE CARE OF WHEN DECIDING THIS DECISION?

Then you divide the participants into groups for discussion in the Breakout Rooms.

The task of each group in the Breakout Rooms is to collect answers to the above questions.

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5.4.3 Knowledge/ theory

Invite the participants to go through the content of chapter 4 of the course module and solve the problem there.

During an online meeting, you can ask volunteers to share their screen and read the course content aloud to all participants.

However, each person tries to solve the task on their own.

5.4.4 Application/ deployment

Ask participants to individually consider and write down the status of their property matters and consider what steps they can take now so that their assets are accepted rather than rejected in the future.

You delegate the same task at home to participants in an online meeting, or - if there is time - they can do it individually in a meeting, reflect and write down their comments on a traditional piece of paper.

STAGE 6

6.1 Name of the stage: Summary and conclusion.

6.2 Educational purpose of the stage:

 a) Consolidation of the content, evaluation and thanks to the participants.

b) Summary of changes in the competences of people participating in the meeting and their consolidation.

6.3 Organizational issues:

6.3.1 Planned time for activity: 10 min.

6.3.2 No. slides in an online course: trainer's decision, assessment tool.

6.3.3 Required materials to conduct the educational meeting: assessment tool.

6.4 Activity (description and additional comments):

6.4.1 Ask participants to point out the most important thing they remember from the meeting (suggest a round).

You propose the same round online, encouraging the final statements of the participants to the camera.

Summarize the substantive content, indicating the most important issues, such as:

- the need to plan the transfer of property

- conscious decision to accept the inheritance

- drawing up a list of important documents

- appropriate preparation of the will so that it is not questioned

- statutory inheritance of property

6.4.2 Encourage participants to take care of their own affairs. As homework, ask participants to talk to at least 2 people

(e.g. a neighbor, a family member) and share their knowledge with them and encourage them to participate in others meetings

organized by the library.

6.4.3 Thank you for actively participating in the meeting and closing them.

7. Methodical materials:

7.1 List of materials and equipment needed to conduct an educational meeting: training room equipment - computers with internet access, projector and screen, flipchart; materials for participants - A4 sheets and small colored cards, writing implements, printable list for distribution to participants (attached at the end of this scenario): LIST OF IMPORTANT PROPERTY DOCUMENTS.

7.2 List of sources for expanding knowledge - additional resources for this topic are available in each language version of the module.

8. Structure of the educational meeting:

Course issue / module:	Meeting stage (no.):	Chapter in online course (no.):	Number of slides in the course:	"From ... to" slides:
How to prepare for the transfer of property?	2	1	all screens	all screens
Statutory and testamentary inheritance	3	2	all screens	all screens
Testament	4	3	all screens	all screens
Acquisition of inheritance	5	4	all screens	all screens

Place for notes:

……….

……….

……….

LIST OF IMPORTANT PROPERTY DOCUMENTS

Prepare a list of documents that relate to your financial situation. Create a folder with these documents and keep everything under control!

➔ MANUAL IN AN EMERGENCY SITUATION - STEP BY STEP

➔ LIST OF PEOPLE WHO WILL HELP IN AN EMERGENCY WITH THEIR PHONE NUMBERS

➔ TESTAMENT

➔ INSURANCE POLICY

➔ LIST AND NUMBERS OF BANK ACCOUNTS

➔ LIST OF BANK DEPOSITS

➔ LIST OF FUNDS, SHARES, BONDS

➔ WORK CERTIFICATES

➔ LIST OF CREDIT CARDS

➔ ALL LIABILITIES

➔ LOGIN FOR THE CREDIT INFORMATION OFFICE (BIK)

➔ LOANS GRANTED AND TAKEN FROM PRIVATE PERSONS

➔ CONTRACTS FOR MEDIA SUPPLY

➔ PROPERTY PROPERTY NOTARIES