

Financial Education Program Planning Guide

STEP 1 – The Big Picture: Creating Your Organization’s Vision for the Future

1. What is your mission with respect to financial education?
2. At the end of the day, what do you want to be known for?
3. What do you want to show with your programs?
4. If resources were not a constraint, what would your ideal financial education programs look like?
5. Who are your key target audiences? What clients need financial education the most? Who can you best help?
6. What are your primary delivery methods (e.g., in-person, telephone, Internet)?

STEP 2 – Identifying Your Organization’s “Signature Programs”

1. What are your strengths with regards to financial education?
2. What financial education programs/materials do you already have that are working for you?
3. Which ones aren’t working for you and why?
4. What programs/materials can be updated or improved?
5. What programs/materials have been developed by other organizations that you have adopted or may want to adopt in the future?
6. What critical gaps in programming need to be filled?
7. Are there materials that you need to develop to fill these critical gaps in programming?

STEP 3 – Defining Program Success

1. What is your evaluation action plan?
2. How are you going to define program success?
3. What outcomes do you want to accomplish?
4. How are you currently tracking your progress to know if you’ve reached your goals?
5. What indicators are you currently using to measure program success? What indicators should you be using?
6. What types of evaluations do you have in place to capture these indicators?
7. What types of evaluations should you be using to measure program impact?

STEP 4 – Identifying Resources

1. What financial and non-financial resources do you need to put your programs into action (i.e., time, money, staff, equipment, expertise)?
2. What resources do you currently have?
3. Where can you look for additional resources?
4. Who are your potential partners?
5. How can you gain support from potential partners?

STEP 5 – Identifying and Overcoming Challenges

1. What challenges do you face in providing financial education to your clients?
2. What can you do to provide financial education given the challenges you face?
3. What can you do to overcome some of your challenges?

STEP 6 – Taking Action!

1. What vision do you now have for your financial education programs?
2. What steps can you take immediately to change how you are providing financial education to your clients?
3. What steps do you need to take in the future?
4. Where do you go from here?