



“FINANCIAL LITERACY- DEVELOPING EFFECTIVE FINANCIAL OUTREACH PROGRAMS”

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FINANCIAL PROGRAM MUST HAVES

- ◉ Partnerships
- ◉ Plan of Work
- ◉ Captured Audience
- ◉ Ice Breakers
- ◉ Participants' Engagement and Involvement
- ◉ Financial Literacy Tools
- ◉ Outside Assignments
- ◉ Workshop Assessment Tools

PARTNERSHIPS



- ◉ Partner with organizations that meet with groups of individuals on a regular basis
 - Churches
 - Sororities and Fraternities
 - Civic Leagues
 - Senior Centers
 - Community Organizations



- ◉ Let your partner know the educational services you can provide
- ◉ Let your partner know their responsibilities

PLAN OF WORK

- Have a Win - Win plan
- What are the objectives of the workshop?
- How many times will you meet with the group or individual?
- When and where will the sessions be held?
- Who will conduct the marketing?
- Who are the contact individuals for the partnership?



CAPTURED AUDIENCES

- **Know your audience**
 - Educational levels
 - Income levels
 - Age range
 - Estimated number of participants
- **Know the goals of your audience**
 - Money Management
 - Credit Management
 - Protecting and maintaining finances
- **Know participants' reasons for attending session**
 - Mandatory
 - Financial incentive
 - Learn financial skills and strategies



ICE BREAKERS

- Spending Choices - Bean Game
- Talk About Money
- Personal Perceptions
- Money Habitudes
- What Kind of Buyer are You?



AUDIENCE ENGAGEMENT AND INVOLVEMENT

- Allow participants to give feedback
- Allow participants to ask questions
- Have questions ready with questions
- Allow participants to work in groups and present outcome to audience
- Give case studies and allow participants to give their input and feedback
- Role-Play



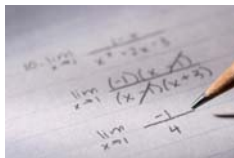
OUTSIDE ASSIGNMENT

- Allow participants to complete some financial tools outside the session
 - Give them an opportunity to apply concepts learned during session
 - Make sure they understand what to do and how to do the tasks
 - Start to implement the process as part of their financial management habits
- Allow participants to summarize information learned during outside assignments.
- Allow participants to summarize information from previous session.



ASSESSMENT TOOLS

- Have participants complete a pre-post workshop evaluation
 - To determine if participants grasp information
 - To determine if participants plan to implement financial strategies and which ones
 - To determine how effective the financial session was for the participants
 - Follow-up tools



EFFECTIVE FINANCIAL OUTREACH PROGRAMS

THANK YOU!



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