



## ENTER REPORT TITLE

INFO Add descriptive sentence on program or slogan

---



YOUR LOGO

<https://Example.com>



YOUR LOGO

August 30, 2019  
ENTER REPORT TITLE

## Opening Message



### INFO

*The opening message is an optional page. Suggestions for this page include: a good program testimonial, personal message, data that highlights impressive results, etc.*



YOUR LOGO



## CONTENTS

|   |          |
|---|----------|
| <b>ENTER REPORT TITLE .....</b>               | <b>1</b> |
| Opening Message .....                         | 2        |
| Event Overview& Programming Details .....     | 4        |
| Education Mix & Programming Touchpoints ..... | 5        |
| Lessons Covered & Educational Resources.....  | 8        |
| Cognitive Rigor Levels .....                  | 9        |
| Financial Educator Overview .....             | 11       |
| Program Measures Overview .....               | 12       |
| Content Knowledge .....                       | 13       |
| Short-term Financial Behaviors .....          | 14       |
| Stage of Change .....                         | 15       |
| Financial Sentiment Measures.....             | 16       |
| Post-training Surveys .....                   | 17       |
| Post-training Feedback .....                  | 18       |
| Organization.....                             | 19       |
| Closing .....                                 | 21       |



YOUR LOGO



## Event Overview & Programming Details

INFO Fill in the remaining area with details of the program. Consider:

### Program Details

Location, dates and times of programming, number of hours for instruction.

### Participant Details

Age range, socio-economic status, life stage, personal challenges.

### Program Goals & Outcomes

Mention measures and outcomes you achieved.



YOUR LOGO

# Education Mix & Programming Touchpoints

## Primary Training Education Mix

The educational mix selected for the program included multiple methods of instruction to engage a variety of learners and to present a variety of methods that align with the users' preferences. Care was taken to ensure that all educational components work together toward a common goal. The educational mix deployed included:

INFO List your educational mix and percentage each method was used. Delete areas that were not used (there should be no 0% items); select from:

- INFO% Live Group Training (describe whether in-person or virtual)
- INFO% One-on-one Training (describe whether in-person or virtual)
- INFO% Online Learning
- INFO% Other Technology-based Learning (email education, social media, mobile)
- INFO% Self-study
- INFO% Add any other delivery methods used.







# Education Mix & Programming Touchpoints (Cont.)

## Added Programming Touchpoints

Besides the education presented in the primary training portion, we also included a focus on pre- and post-programming to ensure a positive learner experience throughout the program. This focus was included to create a positive first impression and to continue supporting participants indefinitely with high-quality ongoing education.



### *Pre-programming*

**INFO** List what you included. Popular options include:

- Benefit-driven marketing & pre-education materials to help learners develop personal reasons to attend the training.
- Communication of important program details to build trust among the learners and help them preview the training.
- A registration process and follow-up communication to give participants timely program updates.
- Learner interest questionnaire to understand the topics that interest them and customize the program to meet their needs.



YOUR LOGO

# Education Mix & Programming Touchpoints (Cont.)

## Post-programming

Recognition for completion of the program by providing them **INFO Popular Options Include: certificate, graduate ceremony, giveaways, matched savings account**, etc. to reward them for their efforts.

Ongoing education to help learners feel supported after the primary training concludes, addressing timely needs to help them extend their learning and apply the lessons to real-life decisions. This program provided:

**INFO Select the ones you used and fill in the details.**

- Extended Learning Plan & Activities. Before students left primary training, they were given assignments.
- DRIP Education. Participant received **INFO weekly, monthly, quarterly, annually** ongoing education via **INFO webinars, emails, training**, etc.
- Calendar-based Education Reminders. Notifications are emailed to participants **INFO weekly, monthly, quarterly** reminding them of timely financial tasks.
- Accountability or Coaching Program. **INFO Details of what you provide.**





YOUR LOGO

# Lessons Covered & Educational Resources

## Lessons Covered

The primary goal of the program was to help them INFO List life event(s) you were focused on – examples – plan for retirement, get out of debt, build long-term savings, prepare to fund college, etc.

To reach that goal, we focused on teaching these lessons:

INFO Select from these lessons or add your own:

- |                                  |                                    |
|----------------------------------|------------------------------------|
| 1. Financial Psychology          | 2. Savings, Expenses, Budgeting    |
| 3. Account Management            | 4. Income                          |
| 5. Skill Development & Education | 6. Credit Profile                  |
| 7. Loans & Debt                  | 8. Government Influences & Taxes   |
| 9. Risk Management & Insurance   | 10. Investing & Long-term Planning |



## Educational Resources

The program leveraged the National Financial Educators Council's (NFEC's) educational resources. The materials are rooted in research-based educational principles and have been tested by tens of thousands of organizations. The program was developed by a collaborative team comprised of educators, financial professionals, and financial education experts – and we recognize that this collaboration has yielded financial education resources that bridge the gap between theory-based education and practical application.

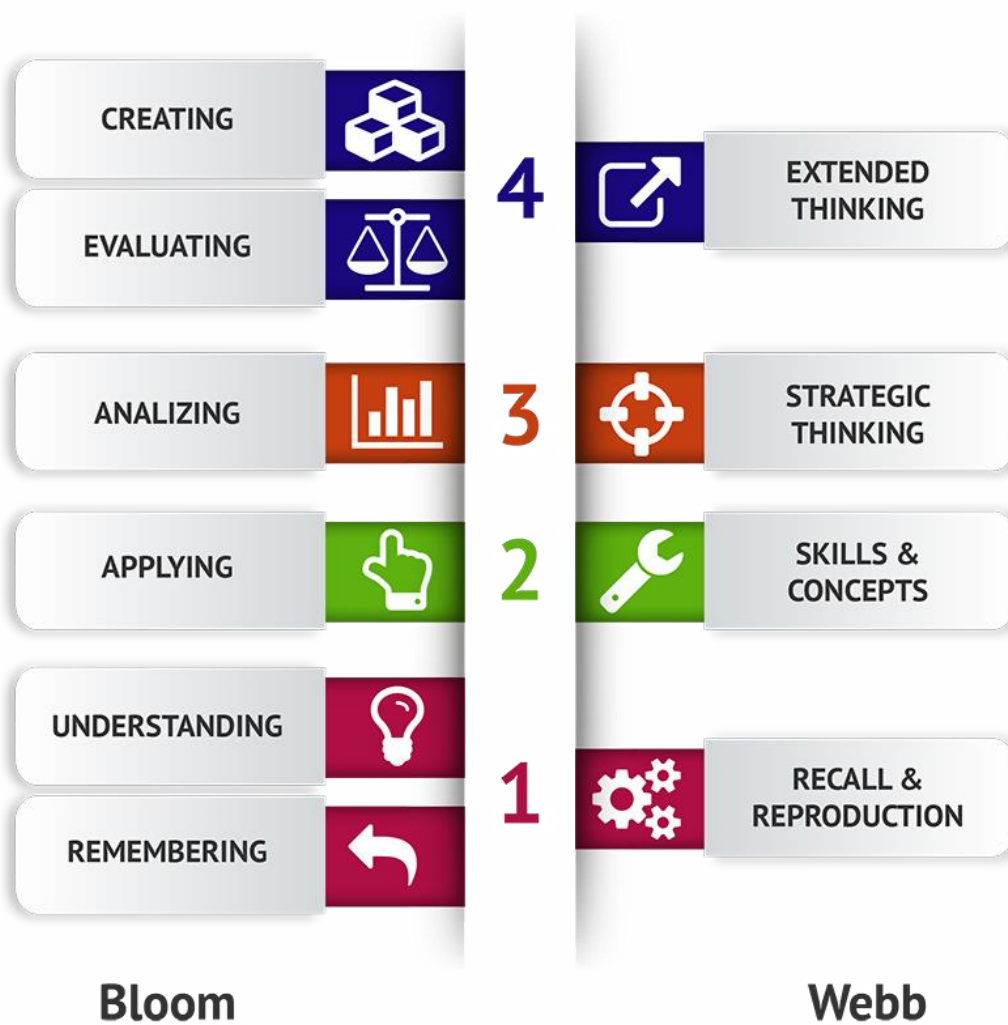
Because every person has different financial habits, emotional connections with money, and current financial realities, we selected material that addresses more than just content knowledge. It includes a focus on establishing positive behaviors, viable money management systems, and financial sentiments in order to help learners work toward positive outcomes.





# Cognitive Rigor Levels

The main focus of our program was on helping participants work toward higher levels of learning. We use Webb's Depth of Knowledge (DOK) framework to guide learner achievement goals, outline the cognitive rigor of the material, and provide a clear context for assessments.





## Cognitive Rigor Levels (Cont.)



### Extended Thinking

At this level, participants can answer questions that require complex reasoning and analysis; they possess the ability to connect lessons with other concepts.

**INFO:** Adjust, augment, or delete to reflect your own program's components.

This program included advanced case method lessons and project-based learning where participants created: List outcomes that they accomplished that meet extended level standards – ex: completed a personal investment plan, researched and selected a health insurance policy.

### Strategic Thinking

Lessons that meet this learning objective require higher cognitive rigor like planning, reasoning, and explaining the process used to derive the answer.

**INFO:** Adjust, augment, or delete to reflect your own program's components.

This program featured lessons to help learners develop their strategic thinking, including: case method approach, lesson activities, and project-based learning.

### Skill & Concept

Activities have participants connect information in the Recall group and apply it to solve problems. Lesson plans at this level ask participants to develop relationships between concepts and interpret data.

**INFO:** Adjust, augment, or delete to reflect your own program's components.

Lecture, connecting with existing knowledge, visual education components, games, mental imagery.

### Recall

These assessments test students' ability to recall information like a name, fact, quote, or other basic piece of information.

**INFO:** Adjust, augment, or delete to reflect your own program's components.

The training did not focus on the recall level, but rather focused on the middle levels of the DOK framework. Through higher-order thinking activities, a secondary benefit was helping participants recall information.



YOUR LOGO

# Financial Educator Overview

## Personal Notes

See Examples

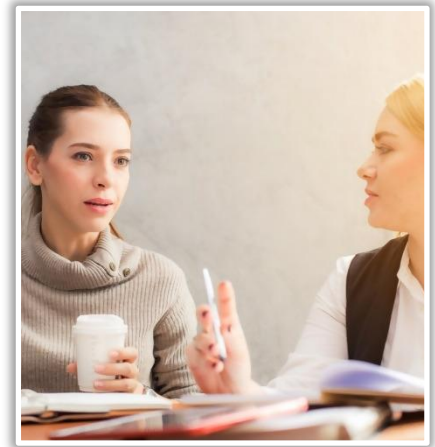
<https://www.financialeducatorsCouncil.org/steven-hughes/>

<https://www.financialeducatorsCouncil.org/patty-gale/>

<https://www.financialeducatorsCouncil.org/a-cecile-watson/>

<https://www.financialeducatorsCouncil.org/james-brisley/>

Add your personal photo – event shots are great; professional headshots work too.



## Instructor Bio

See Examples

<https://www.financialeducatorsCouncil.org/steven-hughes/>

<https://www.financialeducatorsCouncil.org/patty-gale/>

<https://www.financialeducatorsCouncil.org/a-cecile-watson/>

<https://www.financialeducatorsCouncil.org/james-brisley/>

### **Certified Financial Education Instructor (CFEI)**

[Instructor(s) NAME] holds the Certified Financial Education Instructor (CFEI) designation and meets the standards set forth in the Framework for Teaching Personal Finance. Certification holders have demonstrated their competency in teaching methods (pedagogy, teaching techniques & educational best practice) and in content knowledge of personal finance topics.



YOUR LOGO

# Program Measures Overview

## Measurements

Data were gathered on important factors that influence a person’s financial situation. Through testing and surveys, we examined participants’ content knowledge, financial behaviors, sentiment, and willingness to work toward an improved financial situation.

### Essential Measurements to Quantify Programming Impact



## Data Collection Details

Data was collected from:

| Dates                              | Methods   | Participants                    |         |                                  |         |
|------------------------------------|---|---------------------------------|---------|----------------------------------|---------|
|                                    |   | Pre-test Number of Participants | INFO ## | Post-test Number of Participants | INFO ## |
| INFO Date Range of Data Collection | INFO Include how data were collected – online, in class, etc. |                                 |         |                                  |         |



YOUR LOGO

# Content Knowledge

Tests were conducted before and after the programming to measure improvement in content knowledge. The questions were designed in alignment with higher-order thinking frameworks and with a focus on the practical application of the lessons.



Number of test questions:

**INFO ###**

**Pre-test Average Score**

##%

**Post-test Average Score**

##%

**Pre-test High Score**

##%

**Post-test High Score**

##%

**Pre-test Low Score**

##%

**Post-test Low Score**

##%



YOUR LOGO

## Short-term Financial Behaviors

Because people’s finances are influenced by their behaviors, this self-assessment survey has students reflect upon and identify any changes to their financial behaviors since starting the program.

INFO: Enter % of participants results based on the survey results for your group.

| Short-term Financial Behaviors  | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|---|-------------------|----------|---------|-------|----------------|
| Since the training began, I have started putting things I learned into use.   | ##%               | ##%      | ##%     | ##%   | ##%            |
| The training has helped me improve some of my financial behaviors, so they are in better alignment with my long-term financial goals. | ##%               | ##%      | ##%     | ##%   | ##%            |
| Since the start of the program, I feel more motivated to adopt financial behaviors that will help me reach my personal goals.         | ##%               | ##%      | ##%     | ##%   | ##%            |
| The way I manage my money has changed for the better since I started the program.   | ##%               | ##%      | ##%     | ##%   | ##%            |
| Since the training started, I have been more thoughtful about how I manage my money.  | ##%               | ##%      | ##%     | ##%   | ##%            |





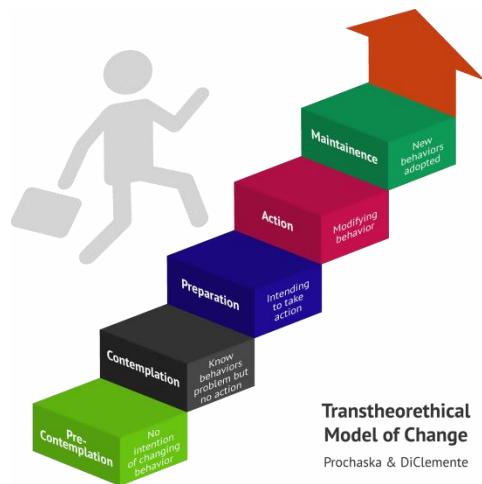
YOUR LOGO

# Stage of Change

The Transtheoretical Model of Behavior Change was used as a framework for assessing a person’s willingness to change or adopt positive financial behaviors. Surveys were provide before and after the training to assess whether participants were moving in a positive direction.



INFO: Enter % of participants results based on the survey results for your group.



| Pre-training Stage of Change Survey |                   | Post-training Stage of Change Survey |                   |
|-------------------------------------|-------------------|--------------------------------------|-------------------|
| ##%                                 | Maintenance       | ##%                                  | Maintenance       |
| ##%                                 | Action            | ##%                                  | Action            |
| ##%                                 | Preparation       | ##%                                  | Preparation       |
| ##%                                 | Contemplation     | ##%                                  | Contemplation     |
| ##%                                 | Pre-Contemplation | ##%                                  | Pre-Contemplation |



# Financial Sentiment Measures

Financial sentiment measures were conducted to understand participants' feelings/attitudes toward money, and level of confidence when making financial decisions.

INFO: Enter % of participants results based on the survey results for your group.



| Pre-training Sentiment Survey |         | Post-training Sentiment Survey |         |
|-------------------------------|---------|--------------------------------|---------|
| ##%                           | 0 - 11  | ##%                            | 0 - 11  |
| ##%                           | 12 - 24 | ##%                            | 12 - 24 |
| ##%                           | 25 - 37 | ##%                            | 25 - 37 |

Participants add up their totals from each survey page and then calculate a grand total score. Based on this calculation, they determine one of the following three levels into which they fall:

**Zero to 11 points** – these participants feel confident and secure about their ability to make financial decisions, and about their current and future financial situations; financial matters cause them little stress. Their direction is to continue monitoring a true picture of their finances and maintain good financial habits.

**12 to 24 points** – participants at this level are not completely confident about their ability to make financial decisions, or about their current and future financial situations. However, they are not overly anxious about money. Financial matters may cause them a modest amount of stress, but typically do not interfere with their ability to enjoy life. They may not always feel that their finances are under their control, so the guidance is for them to identify exactly why they don't feel confident about managing their money, and address the systems they're lacking.

**25 to 37 points** – these individuals lack confidence in their ability to make financial decisions and often feel anxious about their current and future financial situations. Financial matters cause them a great deal of stress. They may feel out of control because they don't have a budget or because they don't know where their money is going each month. These participants would benefit from learning how to create a budget so every dollar they earn has a job to do, and committing to a plan for achieving financial health.



YOUR LOGO

# Post-training Surveys

This survey is designed to get feedback from participants after the programming concludes. This information is used to understand their thoughts about the program and instructor, and what they would like to learn more about.

INFO: Enter % of participants results based on the survey results for your group.

| Short-term Financial Behaviors  | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|---|-------------------|----------|---------|-------|----------------|
| The information presented is something that will benefit me and my finances.        | ##%               | ##%      | ##%     | ##%   | ##%            |
| I feel more confident about the financial topics that were covered in this program. | ##%               | ##%      | ##%     | ##%   | ##%            |
| The information presented in the program is something I will use in my life.        | ##%               | ##%      | ##%     | ##%   | ##%            |
| I would like to participate in future personal finance education programs.          | ##%               | ##%      | ##%     | ##%   | ##%            |
| I would recommend taking this personal finance program to others.                   | ##%               | ##%      | ##%     | ##%   | ##%            |



**What personal finance topics would you like to learn more about in future programs?**

INFO:

Enter select entries from the survey here.



YOUR LOGO



## Post-training Feedback

*Include testimonials & comments from participants, partner organizations, and other stakeholders.*

*Participant Name*

*Include testimonials & comments from participants, partner organizations, and other stakeholders.*

*Participant Name*

*Include testimonials & comments from participants, partner organizations, and other stakeholders.*

*Participant Name*





YOUR LOGO

# Organization

## Our Mission

### INFO

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Quick Styles gallery on the Home tab. You can also format text directly by using the other controls on the Home tab. Most controls offer a choice of using the look from the current theme or using a format that you specify directly.



## Success

### INFO

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document.

You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Quick Styles gallery on the Home tab.



## Moving Forward

### INFO

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Quick Styles gallery on the Home tab. You can also format text directly by using the other controls on the Home tab. Most controls offer a choice of using the look from the current theme or using a format that you specify directly.



## Partner Organization Details

### INFO

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Quick Styles gallery on the Home tab. You can also format text directly by using the other controls on the Home tab. Most controls offer a choice of using the look from the current theme or using a format that you specify directly.



# Closing

*On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.*

*You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.*



**INFO** Include a heartfelt message that aligns with your mission.

**INFO Add your contact information:**

00 Flower Street City, AA  
00000, PK  
000.123.45678  
YourEmail@gmail.com  
<https://Example.com>