Your Money, Your Goals

AN IMPLEMENTATION GUIDE

Consumer Financial Protection Bureau

April 2014

Tool 4:

Training planning tool

Use this tool to make sure you cover all of the bases as you plan your *Your Money, Your Goals* training for case managers.

✔ when complete	Task	Planning notes
	Describe organizational staff or volunteers to be trained.	Which financial topics do they need to learn so they have the knowledge, skills, and confidence necessary to use *Your Money, Your Goals* with clients?
	Who are the people they will be serving? Which programs do the people served participate in?	
	List three to five results you want to achieve with the training.	1. 2. 3. 4. 5.

	Explain how *Your Money, Your Goals* will be integrated organizationally. *NOTE: Use Tool 1: Finding opportunities to introduce financial empowerment.*	
	How much total training time will you have with staff or volunteers?	☐ 1 hour ☐ 2 hours ☐ 3 hours ☐ 4 hours ☐ 5 hours ☐ 6 hours ☐ 7 hours ☐ 8 or more hours
	How will the training be delivered?	☐ At one time ☐ Over two sessions ☐ Over more than two sessions
	Secure a training location.	

	Read through the toolkit. Rank the content modules from most important to least important based on the needs of your target audience, the people they serve, and your desired results for the training.[7] *NOTE: Ranking is only important if you know you will not have a full 8-hour time block to train staff.*	____ Setting Goals and planning for large purchases ____ Saving for Emergencies, the Unexpected, and Goals ____ Tracking and managing Income and Benefits ____ Paying Bills and Other Expenses ____ Getting through the month ____ Dealing with Debt ____ Understanding Credit Reports and Scores ____ Money services, cards, accounts, and loans: finding what works for you ____ Protecting your money
	Identify a financial empowerment trainer. In your conversations with trainers, make sure that you: ▪ Provide information about the target audience. ▪ Share your analysis of *Tool 1: Finding opportunities to introduce financial empowerment*. ▪ Explain training time constraints. ▪ Describe priority modules. ▪ List expectations for the trainer including that they do a detailed reading of the toolkit to learn its contents.	

[7] Note that module titles reflect those included in the toolkits that have been released for Community Volunteers and for Legal Aid and Worker Organizations. An update to the Social Services toolkit available at www.consumerfinance.gov will be released in late 2015.

	Customize the training using the *Your Money, Your Goals* training slides. There will probably be more slides and interactive exercises than you have time to use. Choose material that best meets your training objectives. Note that some exercises have worksheets that need to be copied for use in small and large groups. The trainer should add notes, stories, and examples based on her own experience or what would be most relevant to the case managers and other frontline staff being trained. *See http://www.consumerfinance.gov/your-money-your-goals. When you open this PowerPoint file, look for the trainer notes in the Notes Pane beneath the slide. There is also an option for printing the slides so that the speaker notes are visible.*	
	Secure commitments from executive- or supervisory-level staff in organizations sending case managers or other frontline nonprofit staff to training. Engage the staff or volunteer coordinator if you are planning to train volunteers.	List those from whom you have commitments:
	Develop invitations to the training. Invitations should include logistical information.	

	Order training supplies and develop training props. *See the trainer notes for Slide 1 of the Your Money, Your Goals training slides.* Set up the training room to provide for interactive participation. It is ideal to have round tables or to configure tables and seats to accommodate smaller groups of up to 8 participants. Include flip charts, markers, an LCD projector, microphone, if needed.	
	Other:	
	Other:	

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