

## Financial Literacy Program

### Program Documentation (Summary Sheet)

*(To be completed by the staff who deliver your financial literacy program)*

Organization Name \_\_\_\_\_

Program Name \_\_\_\_\_

Staff Contact Name \_\_\_\_\_ Email \_\_\_\_\_

Course Date(s) From: (dd/mm/yr) \_\_\_\_\_ To: (dd/mm/yr) \_\_\_\_\_

Forms collected	# of forms collected
<input type="checkbox"/> Consent and Release	
<input type="checkbox"/> Intake	
<input type="checkbox"/> Demographics and Pre-assessment	
<input type="checkbox"/> Exit and Post-assessment	
<input type="checkbox"/> Workshop Evaluation (satisfaction survey)	

**How did you deliver this program?** (Please check all that apply)

One-on-one support and information for participants       Self-directed and/or distance learning (computer- or Internet-based)  
 Group-based workshop(s)       Other Please specify \_\_\_\_\_  
 Income tax clinic

**Was the financial literacy programming *embedded* into another activity, program or service?**

Yes     No    If yes, what was the activity, program or service? \_\_\_\_\_

**What supports to participation did you offer?**

Child minding services       Adapted program hours  
 Ticket/tokens for public transit       Special program location  
 Translation/interpretation services       Other Please specify \_\_\_\_\_  
 Snacks/food

<b>Did you deliver financial literacy programming in partnership with others?</b>	
<input type="checkbox"/> Yes <input type="checkbox"/> No    If yes, who were your partners? _____	
<b>Training statistics</b>	
Total number of <b>workshops/activities</b> delivered	_____
Number of different staff delivering the course	_____
Total delivery <b>hours</b>	_____
Number of participants <b>enrolled</b> in the course	_____
Number of participants <b>completing</b> the course <i>(Those who completed at least 70% of all sessions)</i>	_____
Other? Explain _____	_____
<b>What did you like about the program design and/or curriculum?</b>	
<b>Was the delivery process/schedule for this course altered in any way from the normal or prescribed approach? Please elaborate. (E.g. shortened schedule, re-sequencing of activities, turnover in delivery staff part way through course, etc.)</b>	

Record of curriculum used			
<i>(Note: insert your program outline here)</i>	I used this module	I did <u>not</u> use this module	Comments/Notes: What kinds of changes did you make to the curriculum? (e.g., challenges for a specific client group; language usage; workshop design)
Exploring your relationship with finances	<input type="checkbox"/>	<input type="checkbox"/>	
Budgeting – developing a money action plan	<input type="checkbox"/>	<input type="checkbox"/>	
Savings	<input type="checkbox"/>	<input type="checkbox"/>	
Banking	<input type="checkbox"/>	<input type="checkbox"/>	
The educated consumer	<input type="checkbox"/>	<input type="checkbox"/>	
Credit and credit cards	<input type="checkbox"/>	<input type="checkbox"/>	
Debt and financial woes	<input type="checkbox"/>	<input type="checkbox"/>	
Exploring credit bureaus, ratings, scores and reports	<input type="checkbox"/>	<input type="checkbox"/>	
Investing basics	<input type="checkbox"/>	<input type="checkbox"/>	
In future programs, what would you change about the program design and/or curriculum?			

Questions for one-on-one/coaching programs:

Coaching statistics (Quarterly)	
Total number of staff offering one-on-one FL coaching	_____
Total staff hours spent in delivery of coaching this quarter	_____
Number of <u>new</u> coaching participants this quarter	_____
Number of <u>repeat</u> coaching participants this quarter	_____
Total number of <u>distinct</u> coaching participants <u>this calendar year</u> (to date)	_____
What do you think is going well with your financial literacy coaching?	
What would you like to change about your financial literacy coaching work?	

<b>Matched Savings Program Stats (e.g. IDAs, Saving Circles, ILAs, etc.) (Quarterly)</b>	
<b>To be completed in conjunction with FL training statistics (above)</b>	
Number of participants enrolled in the overall program (this period)	_____
Number of program graduates (this period)	_____
Number of participants who opened savings accounts (this period)	_____
Total number of graduates to date	_____
Average target (\$) for savings	_____
Total participants' savings to date	_____
Match funds released for asset purchase	_____
Average length of time to achieve savings target	_____

**Questions for all programs:**

<b>Priorities for action: What external factors or trends are holding participants back and contributing to participants' money problems and financial exclusion? What key financial literacy issues have your participants encountered this period? E.g. government and/or private sector policies, regulations, procedures etc. (please explain using examples from your work)</b>
<b>Going forward, what kind of support do you need to deliver this financial literacy program?</b>

<b>Staff reporting of immediate outcomes that have resulted from your financial literacy activity (this period)</b>	
# Participants completing and filing their taxes	_____
# Participants receiving tax refunds	_____
Value of those tax refunds this period	_____
# Participants applying for and receiving ID	_____
# Participants opening an RESP	_____
# Participants accessing a CESG	_____
# Participants accessing social assistance (welfare, public disability, CPP etc.)	_____
# Participants opening a bank account	_____
Other? Explain _____	_____
# Participants	_____
<b>Please share your stories about results... Please note any specific changes of behaviour and/or attitudes that you observed in your participants over the course of your work with them (e.g., getting credit report; increased savings; creating a personal budget).</b>	

Thank You!