

## 2014 Financial Education - Six Step Plan of Work



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Vice:		

Committee Members:

Sophia Bera	John Comer	Christine Damico	Mike Erpenbach
Karen Gemmill	Jason Plank	Jeanna Sabers	Lisa Stitzel

### FOSTERING TRUST

We will foster trust by...

- Frequent and scheduled communication within the committee to allow each committee member to accomplish tasks.
- Committee chair and vice chair will help lead committee to move forward on vision.
- Communicate frequently with other FPA MN communities. Through cooperation with other committees, we will drive synergies to help FPA Financial Education Committee fulfill its mission.

### CREATING VISION

Our vision is to...

- Identify, clarify and make visible opportunities to be involved for FPA MN membership.
- Help build a financially educated and empowered community.
- Build awareness of FPA MN within Minnesota consumers.

### DEVELOPING STRATEGY

Strategy	Target Date	Committee Member(s) Spearheading	Critical Success Factors
Volunteer Hub Database <ul style="list-style-type: none"> <li>- Ensure high quality and accuracy of volunteer information in database.</li> <li>- Determine how to best use Volunteer Hub as an effective means of communication with potential volunteers.</li> <li>- Better understand ability of system to help track quantitative metrics.</li> </ul>	First half of 2014	Seth / Sophia	<ul style="list-style-type: none"> <li>- Quality of information in database.</li> <li>- Ability to communicate directly to Chapter members with specific volunteer interests</li> <li>- Ability to track member volunteer activities</li> </ul>

<p>Expansion of working relationship with BestPrep</p> <ul style="list-style-type: none"> <li>- Continue to participate in semi-annual eMentors program.</li> <li>- Determine if we are able / willing to provide expanded resources for other BestPrep programs (e.g. Classroom Plus, Financial Matters, etc.).</li> <li>- BestPrep has communicated that they have several volunteers from FPA outside of our committee as well as people who volunteer through employer, but may be an FPA member. <ul style="list-style-type: none"> <li>o Work to aggregate these names.</li> <li>o Could help with future outreach to members.</li> <li>o BestPrep may also be able to assist with tracking.</li> </ul> </li> <li>- MN Business Ventures will continue to be opportunity for involvement.</li> <li>- Have requested BestPrep reach out to Committee Chair when they have needs. <ul style="list-style-type: none"> <li>o Will then communicate need to FPA membership.</li> </ul> </li> <li>- FPA will continue to support Birdies for Best Prep</li> <li>- May look to have BestPrep come to a Chapter meeting and speak about their organization.</li> </ul>	<p>Throughout 2014</p>	<p>Seth</p>	<ul style="list-style-type: none"> <li>- Frequent communication with BestPrep.</li> <li>- Ability to meet BestPrep needs with FPA resources</li> <li>- Tracking of activity</li> </ul>
<p>Develop quantitative measures to track activity</p> <ul style="list-style-type: none"> <li>- Will look to utilize Volunteer Hub <ul style="list-style-type: none"> <li>o Initial thoughts are to track # of events, # of hours, # of people reached, # of FPA participants, etc.</li> </ul> </li> <li>- Once quantitative criteria established, set goals for 2014. <ul style="list-style-type: none"> <li>o Work with committee to set goals.</li> </ul> </li> </ul>	<p>First half 2014</p>	<p>Seth</p>	<ul style="list-style-type: none"> <li>- Learn capabilities of Volunteer Hub</li> <li>- Begin to use Volunteer Hub to communicate volunteer opportunities</li> </ul>
<p>Determine if we have resources to foster new working relationship with additional CBO(s)</p> <ul style="list-style-type: none"> <li>- Use United Way website or local United Way to source potential partner CBO with a focus on "Income" as defined by United Way <ul style="list-style-type: none"> <li>o Work with committee to determine areas of interest (i.e. students, young adults, seniors, low income, military, etc.)</li> <li>o If it is decided to move forward on this initiative, leverage specific committee member(s) to initiate process, determine involvement, etc.</li> </ul> </li> </ul>	<p>Second half of 2014</p>	<p>Committee as a whole</p>	<ul style="list-style-type: none"> <li>- Assess committee and Chapter's desire / resources to expand outreach</li> </ul>

Continue to build internal working relationships ○ See comments under Energizing Alliances	Throughout 2014	Committee as a whole	- Develop relationships with other committees in order to share resources and help meet stated goals / objectives
Actively seek out 1-2 additional committee members, work to fill Vice Chair position, outline succession planning for leadership of this committee.	Throughout 2014	Committee as a whole	

### ENERGIZING ALLIANCES

Alliance	What do we want?	What do they want?
Pro Bono Committee: Improve communication and working relationship with pro-bono	<ul style="list-style-type: none"> <li>- Work to create synergies with pro-bono (e.g. co-participation in volunteer events (one-on-one counseling with specific education topic breakout))</li> <li>- Periodic attendance for pro-bono committee members</li> <li>- Determine if we should assign committee member as liaison</li> </ul>	- Opportunity to provide FPA pro-bono resources to meet needs of community
Public Relations Committee:	<ul style="list-style-type: none"> <li>- Work with PR to better communicate financial education / pro-bono events and opportunities and share success stories.</li> <li>- Expanded communication of volunteer opportunities.</li> <li>- Continued recognition of volunteer efforts</li> </ul>	- Better communication of FPA activities to membership and other partners

### ACTIVATING TRANSFORMATIONS

- Each committee member will be responsible for specific duties for the committee. Some people will lead contacting members to get volunteers; others will be liaisons or relationship managers with existing CBOs and others will build new relationships.
- Duties will be assigned based on the skills and interests of the committee members. We will find volunteers, committee members and community resources by effectively communicating the benefits to the volunteers and community

**MEASURING PROGRESS, ACHIEVING RESULTS AND RESETTING THE VISION**

<b>Strategy</b>	<b>Monthly Report of Achieved Progress</b>	<b>Current Action Item(s)</b>	<b>Person Responsible (Alliances?)</b>	<b>Deadline for Action</b>
Volunteer Hub Database		Work with pro-bono to get accurate data and input into the Volunteer Hub system.	Seth / Sophia	3/31/2014
Expansion of working relationship with BestPrep		Plan to meet with Samantha at Birdies for BestPrep to discuss opportunities.	Seth	12/31/2014
Develop quantitative measures to track activity		Once Volunteer Hub capabilities are known, learn system's ability to track volunteers and activities	Committee	4/30/2014
Determine if we have resources to foster new working relationship with additional CBO(s)		Re-visit second half 2014	Committee	8/31/2014
Continue to build internal working relationships		Meet chairs of all FPA MN committees	Committee	12/31/2014
Actively seek out 1-2 additional committee members, work to fill Vice Chair position, outline succession planning for leadership of this committee.		Lisa has expressed interest and will likely fill Vice Chair opening	Committee	12/31/2014