



Virtual Resource Fair and Networking

Webinar 4
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NATIONAL CENTER ON
Parent, Family and Community Engagement



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Resources

BUILDING FINANCIAL CAPABILITY
 A Planning Guide for Integrated Services

Prepared by CFED under the ASSET Initiative Partnership for the Administration for Children and Families at the US Department of Health and Human Services

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 Reader suggestions about *Building Financial Capability* are welcome. These may be sent to PlanningGuide@cfed.org.

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Decision #1: What financial capability services will we provide to clients?

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Building Foundations for Economic Mobility

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Cross-Cutting Section: Making the Case

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Decision #2: Who will deliver the identified financial capability services to our target clients?

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Decision #3: How will the financial capability services be integrated?

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Cross-Cutting Section: Making the Case
Tool: Key Stakeholder Support

Ongoing Decisions: How can we convince key stakeholders to support this work?

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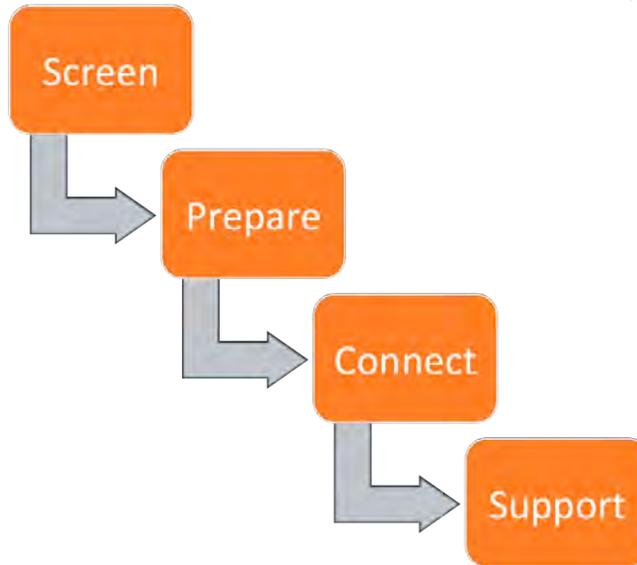
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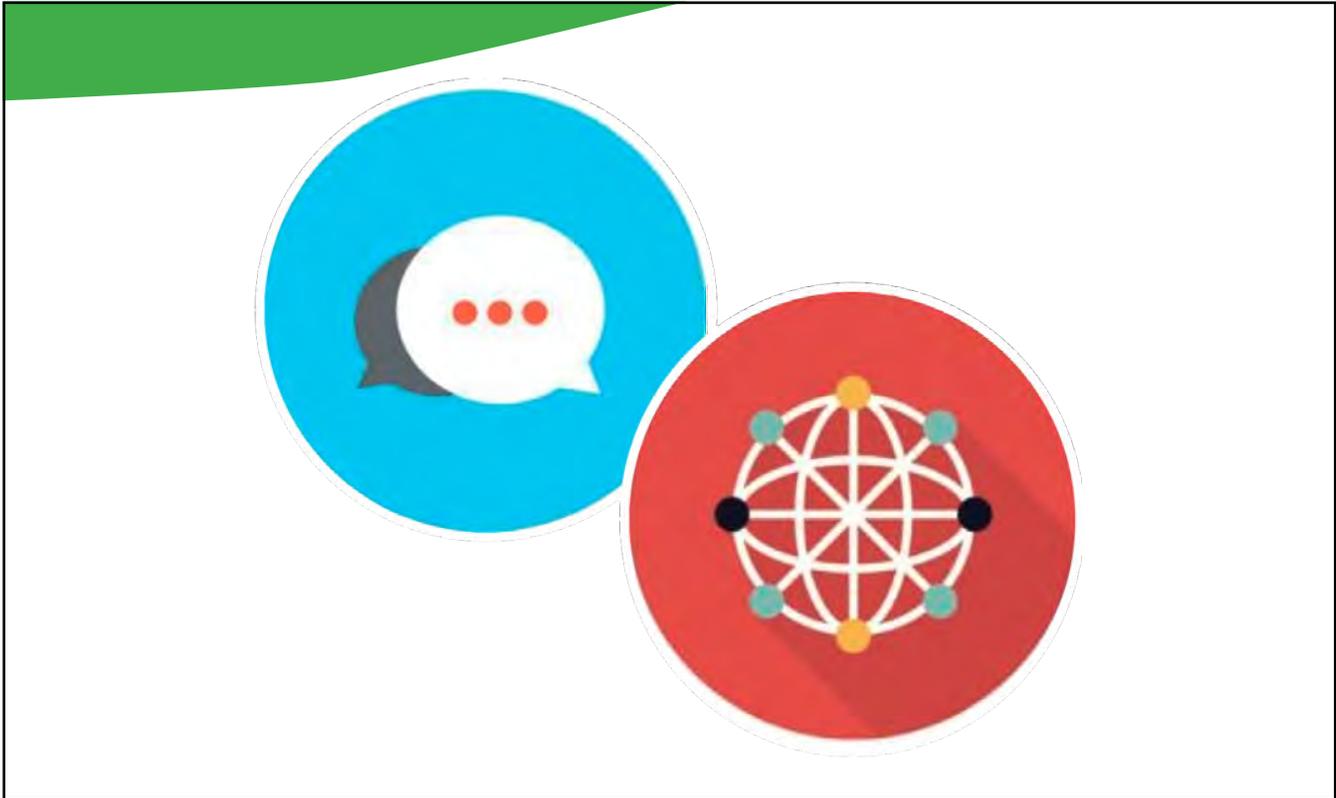
Building Foundations for Economic Mobility



Tool 9: The Referral Plan



Screen	Prepare	Connect	Support
<p>Good fit: Parent has identified a financial goal / or life goal (e.g. going back to school). Anyone willing to engage in conversation about finances. Anyone who's just recently had an increase in income.</p> <p>Bad fit: In crisis, bankruptcy or interested in debt consolidation</p> <p>Capacity: Redmond has more capacity than Bend proper, but capacity in both.</p> 	<p>***Tell parents:</p> <ol style="list-style-type: none"> 1. There is no limit to the length of engagement, financial counselor will work with you as long as you stay engaged. 2. A financial counselor will contact you. They will set up a meeting with you. They can come to your home during a home visit. You are not committing to anything long-term. 3. First meeting will usually take an hour. 4. It's okay to come with your children, just let the financial counselor know. 5. Financial counselors will keep your info confidential. <p>***Give parents menu of services and description of program workflow.</p>	<p>Advocates will have a referral form that they give to parents that gives HS permission to share HS application with financial counselors.</p> <p>Once form is signed, advocate will scan and send the Head Start application to the financial counselor's data manager.</p> <p>The advocate will tell parent the name of the counselor who will be contacting him/her.</p> <p>Financial counselor will call parent – offer phone, in-home, or in-office meeting.</p> <p>***One financial counselor will be assigned to each Head Start region so advocate will always be referring to same counselor.</p>	<p>To streamline goal setting, the financial counselor will ask if the parent would like his/her goal incorporated into his/her Family Partnership Agreement. (If yes, get permission to share info with HS).</p> <p>Advocates will ask parents how meetings with financial counselors are going.</p> <p>Communications between advocates and financial counselors by: Emails between financial counselors and HS advocates Share spreadsheet summarizing referral data</p>



Family Well-Being Resource Series



Strategies for Increasing Parent Participation in Financial Education Activities
 Family Well-Being and Financial Security Resource Series

Many Head Start and Early Head Start programs struggle to make more time for parents and to provide more strategies for recruitment and engagement. This document provides strategies for increasing family well-being and financial security through financial education activities.

Key Activities to Prioritize

- Consider the feasibility of various activities that address the needs of your families. Using case studies and research, identify activities that are most likely to be successful in your setting.
- Keep the content on financial education relevant to your families and their needs. Use information on the Asset Survey to identify the needs of your families. As a new teacher, you will have a lot to learn from your colleagues.

Family Service Workers and Financial Empowerment: Steps and Resources
 Family Well-Being and Financial Security Resource Series

Many Head Start and Early Head Start (EHS) family service workers, educators, and other staff have a critical role in providing the information and support families need to pay down their "to-do" list, make the most of a limited income, and, in some cases, begin planning for the future. It can be challenging, however, to identify programs to refer where to start when they need to build staff knowledge and skills in these areas. This document outlines a process for getting started and provides additional resources for staff and families.

Overview

Building staff capacity to support families in increasing their financial security is a four-step process:

- 1) Assess your staff's training needs and level of comfort talking with parents about financial topics.
- 2) Train staff on key financial topics and community resources. This can be beneficial both for staff members themselves and for families in the HHS/EC community.
- 3) Create staff with tools and materials that can help guide their interactions with parents.
- 4) Provide state-based training or coaching strategies that set staff up for success. Set goals with parents, and support parents in working toward their goals.

Step 1: Assess staff training needs

- Survey and/or conduct focus groups with family service workers, educators, and other staff to identify areas where staff need support. Managing their own finances, and how staff want financial topics they feel comfortable addressing with parents, and topics about which they feel they need to learn more. Use a survey or focus groups, ask open-ended questions for information staff to collect on their comfort with financial topics. Through a survey, you can also determine the topics staff to focus their comfort level from one to five. But determine, on a variety of financial topics, a sample survey that can be related to your program is included in the Appendix. You can also use the survey tool, such as Survey Monkey (<http://www.surveymonkey.com>), to create your own survey.
- Analyze the results. Compile and analyze the survey results in order to develop an assessment of staff training needs. Consider survey tools, such as Survey Monkey, can provide results for you.

The Importance of Maintaining Confidentiality

When engaging staff and families on financial topics, it is critical to ensure that any personal information discussed and results generated are protected and protected in discussing that financial information.

ADMINISTRATION FOR CHILDREN & FAMILIES ASSET

Published Briefs



Family Well-Being Resource Series

COMING SOON

- **Increasing Family Well Being through Increased Financial Security**
- **Assessing Head Start Families' Financial Capability**
- **Financial Coaching in Head Start Programs: Leading Families on a Path to Financial Security**



Assets & Opportunity Network?



National learning and advocacy community

Lead State & Local Organizations

Member of the A&O Network

- ★ State Network Leaders (38)
- ★ Local Network Leaders (52)
- ★ Native Network Leaders (2)
- Not yet part of the A&O Network

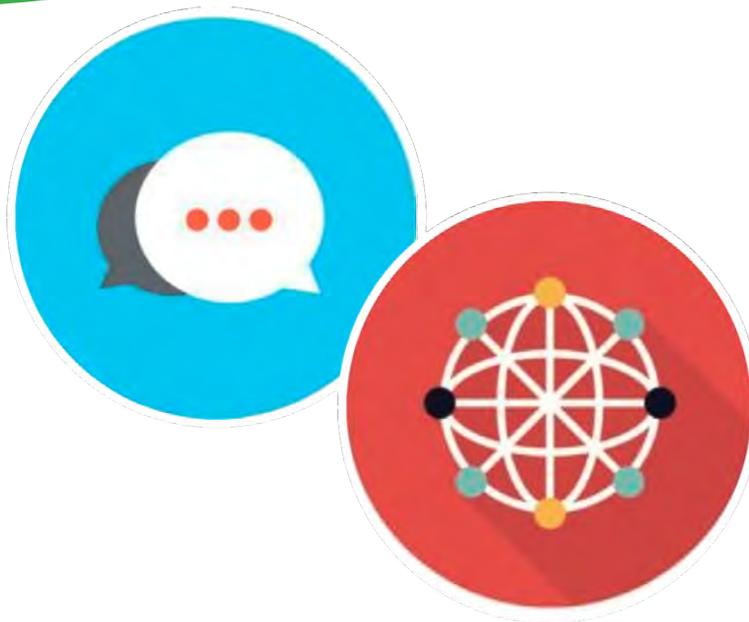
Join the Assets & Opportunity Network as a General Member

- Stay informed
- Share your experiences
- Participate in intensive learning opportunities
- Engage in national dialog on asset-building solutions
- Access responsive technical assistance
- Be eligible for event scholarships
- Build your communications skills

To join or learn more, go to assetsandopportunity.org/network

Head Start Financial Capability Learning Community

COMING SOON





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Human Resources Data & Development
Coordinator



Haley Atherton
Content Specialist

Our Family's Partnership Plan

Oregon Child Development Coalition

Family Name: _____ Family Advocate: _____ Date: _____

Parenting Education Finances Health & Safety

Wellbeing

Community & Peers Transitions

Programs and People that Support Our Family

Family

Leadership

Child Development

Is there a plan with any other service or program?
 No Yes, please name: _____

What gets in the way?

What do my family and I want to know more about? What interests me and my family?

What's next for us (who will do what by when)?

What will be helpful right now?

Supports pre-existing plan? N/A Yes No

Family Signature: _____ FA Signature: _____

Distribution: White: PARENT - Yellow: FAMILY FILE

FHS905ENG-Our Family's Partnership Plan-2013



Guide to the Conversation

We are going to start at the circle in the middle of the page and from there work outward and down using the questions below.

Let's fill this partnership plan in together.

1. Who do you consider your family?
2. From where does your family receive support or services (people, programs, organizations, groups)?
3. Does your family already have a plan with any other service or program? No Yes
 - a. If yes, with whom?

We can support you in the accomplishment of a plan you already have. Tell me more about the plan you have with _____.

These smaller circles represent the different areas of your family's life. Think about what you wish for your family and what is most important to you during this time. The circles with words have some ideas of what we can talk about. We can use these ideas or not, change them, and we can add into these other blank circles any other topics on which you want to focus. You might want to talk about something that is going well for your family that you want to nurture and maintain. There might be something that is stressing, concerning, or difficult for your family that you want to talk about or do something about. We can talk about either or both.

4. What would you like to talk about today? Tell me more about that.

There might be some obstacle getting in the way of your family's development that we can problem solve together.

5. What is getting in the way of what is most important to you during this time?

Every family has strengths and uses strategies and resources to help them grow or in difficult times. Based on what we have talked about today:

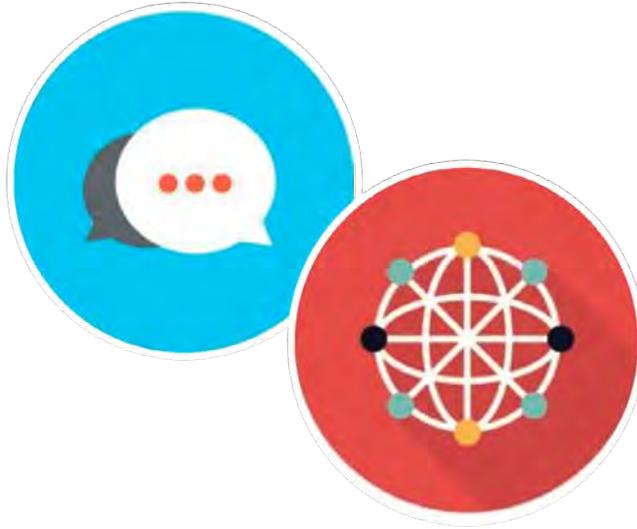
6. What / who do you think might help right now?
7. What do you and your family want to know more about? What interests you and your family?

This is what's next for you and your family as you grow. We can be your partner in this next step, as you use the resources available or find new ones that help. There are many areas of family life, and as we develop our partnership we can adjust or make changes as your family grows.

8. What's next for you and your family (who will do what by when)?
 - a. Does this support a plan with another service or program? N/A No Yes If yes, please describe how so:



OPEN CHAT



NETWORKING



Early Childhood
National Centers



Building Foundations
for Economic Mobility

PFCEwebinars@ECETTA.info

or call (toll-free) 1-866-763-6481

<http://eclkc.ohs.acf.hhs.gov/hslc/tta-system/family>

