


CCCCO System-wide  
Financial Education Project

October 14, 2014

# Financial Literacy

California Community  
Colleges Chancellor's  
Office



Ruby Nieto - CCCCCO  
and  
John Pierson - Parker, Pierson  
and Associates (PPA)

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## CCCCO's DPI Overview



NEFE  
CashCourse

Financial Literacy

PPA  
- Private consultants

Services &  
Tools  
- Default  
prevention

CCCCO's  
Default  
Prevention  
Initiative  
objectives

Tier 1 initiative

Tier 2 initiative

Default  
Prevention

CCCCO's Default  
Prevention Initiative

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## In This Session

- Project Goals
- Three Phases
  - Phase One: Activities/Timeline
  - Phase Two: Activities/Timeline
  - Phase Three: later...
- Financial Education Plan Template and Other Resources
- Assistance Available

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## Financial Education Project Goals

- System-wide
- Tying things together: Identifying the cross-walks
- Specific Financial Education (FE) goals:
  - Increase financial competency of all students
  - Increase Student Success
  - Reduce Loan default (see it's third on the list!)
  - Creating Institution-wide Effort

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## Three Phases

- Phase One (Now)
  - Dissemination of FE information on Campus
  - Institution-wide involvement
- Phase Two (Soon)
  - Building FE Capability
  - Integrating FE onto the campus
  - Classroom, workshops, special instruction
- Phase Three (Later)
  - Delivering FE to your community
  - Elementary/Secondary Schools and local community

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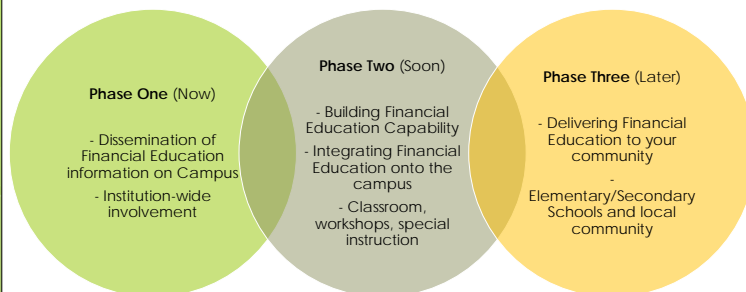
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## Three Phases



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## Phase One

- Its All About "Integrative" Dissemination of Financial Education on your Campus
- Establishing FE Team
  - Leadership
  - Members
- Role
  - Create, Manage and Tracking Financial Education initiative
  - Identifying institutional opportunities and/or partners
  - Establish collaboration with Student Success Effort
  - Establish collaboration with Default Prevention Effort
    - Where applicable
  - **Timeline: Beginning Fall 2014 and continuing**

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## Phase One

- Making FE a part of important campus activities
- Review list of enrollment cycle opportunities listed in template.
- Choose select opportunities with goal of increasing list as opportunities arise in normal course of academic year
- Find partner associated with that activities and explain goal of disseminating FE material on that occasion
- Choose material from Tool Kit and provide that to Partner/Collaborator for dissemination
- Record this in your plan: Who, what, when, how, and mechanism for reporting back to Team that task was completed

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## Phase One

- Making FE a routine part of campus operations
- Finding Campus partners to disseminate FE materials
  - Review Template for partial list of campus partners.  
You are not limited this list
- Meet face-to-face
- Explain goal of disseminating FE information through 'any and all' routine interactions with students
- Explore what they do and how, looking for ideas about how they may be able to disseminate FE 'routinely'
- Together review Tool Kit. Let them choose one or more things they think appropriate
- Establish an implementation plan: Who, what, when, how, and mechanism for reporting back to Team on progress

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## Phase One

- Collaboration with student success team
  - Establish Meeting with Student Success team
  - Review current student success initiatives
  - Explore how to integrate FE materials and activities into current student success effort
  - Review CashCourse and Tool Kit to match resources with opportunities
  - Written...even if brief...implementation plan to be made part of school FE plan

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## Phase One

- Collaboration with default prevention team
  - Establish Meeting with DP team or individuals charged with default prevention (if there are any)
  - Review Current Default Prevention Activities
  - Discuss how to integrate FE materials and activities into current default prevention effort
  - Review CashCourse and Tool Kit to match resources with opportunities
  - Written...even if brief...implementation plan to be made part of school FE plan

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## Phase Two

- Integrating FE onto campuses
  - This is where the effort separates from the usual...
- Classroom/Workshop/Special Initiatives
- Training CC system and school staff to become FE trainers
  - Process
  - Identify system-level and school-level volunteers
  - Training
  - Certification

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## Phase Two

- Training Materials
- CCCCCO will establish curriculum team
  - Development of 'turn-key' materials that schools can use in classroom, workshops, special initiatives
  - Available to all schools
- Material will be added to toolkit...more to come
- **Timeline: 11/2014 – 12/2015**
- All schools can participate
  - Level of participation...your choice
- **Late November Webinar: More About Phase Two**

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## Phase Three

- External FE Efforts
  - Utilizing new FE capacity to benefit your local community
  - FE for Secondary Schools in your CC district
  - FE in your local community
- Timeline
  - Initiate once Phases one and Phase two are fully implemented (2016-17)
  - Identify community partners/partnerships
  - CCCCCO curriculum team will develop FE training materials
  - Community FE materials to be added to toolkit
- **Most Important: Don't give it a second thought right now**

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# Living Toolkit

- Resources for administrators
  - Administrative guidance
  - Promotional material
  - Basic financial education materials
- Template
  - Checklist
- In the works!

CCCCO's Financial Literacy Initiative Webpage
  - Survey link for tracking
  - Host Financial Literacy resources
- More to come in the future

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Toolkit

# CashCourse Resources for Administrators

40 Money Management Tips Booklet	CashCourse Logos	Facebook Posts	How-To Documents	Marketing Templates
Online Scavenger Hunts	Reimbursement Program	TRIO Resources	Twitter	Web Analytics Guide
Worksheets	Workshop Kits			

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## Workshop Kits

- Customizable Power Points
- Facilitator's guides
- Student evaluation forms
- Pre-test and post- test
- Worksheets

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## New: Resources by Topic

- Recently created document by CashCourse
  - Provides an overview of selected CashCourse resources by topic
  - Use this guide to pick and choose resources to integrate into your financial education programming
  - Embedded hyperlinks takes you to online tools underlined in this guide

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## New: Resources by Topic

### 6 Key Topics

- Budgeting
- Financial Aid & Student Loans
- Credit & Debit
- Saving & Investing
- Working & Earning
- Shopping & Spending

### 7 Resource Sections

- Coursework
- Videos
- Calculators
- Quizzes
- Worksheets
- Key Articles
- Workshop Kits

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## Summary

### Phase One: CashCourse Promotion

- Activities
  - Dissemination of Financial Education information on Campus
  - Institution-wide involvement
- Timeline
  - Beginning Fall 2014

### Phase Two: Train-the-Trainer

- More information and a Webinar coming soon
- Timeline
  - Beginning Spring 2015

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## Next Steps

- Identify campus partners
- Make use of the Financial Education Plan Template
  - Begin CashCourse promotion on campus
  - Make use of Toolkit and other resources
- Assistance Available

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## Help is Available

Plan Implementation/CCCCO Questions

John Pierson  
404-395-9991  
john@parkerpierson.net

Ruby Nieto  
916-322-4300  
rnieto@cccco.edu  
CCCCO

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## Help is Available

CashCourse and NEFE:

Amy Marty  
Manager, CashCourse Program  
National Endowment for Financial Education  
303 224-3520  
AMarty@nefe.org

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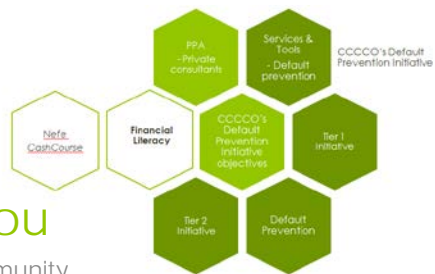
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## Thank you

California Community  
Colleges Chancellor's  
Office



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