

Program Focus Team Guided Discussion
Spring Action Conference 2011
Program Focus Team: Family Financial Management

(Note: prior to SAC team leaders complete Self-assessment for PFT Action Plans)

Each PFT has developed at least one action plan. While these plans are often comprehensive in nature and meant to be implemented over the next few years, we would like you to focus your discussion at the Spring Action Conference on the part of your action plan(s) that you will address between October 1, 2011 and September 30, 2012.

For each PFT action plan you will be working on between October 1, 2011 and September 30, 2012 complete the following questions.

1. Title of Action Plan:
Kansas Financial Security for All
 2. What priority will the PFT be working on related to this Action Plan within the next year?
Legally Secure Your Financial Future (LSYFF)-Section One: Organizing Records / Estate Planning
 - What **advanced** professional development* will be offered (targeting team members) related to this priority in the next year?
1. Potential: Team attendance at 2012 EFERMA-Eastern Family Economics & Resource Management Association Conference, Charlotte North Carolina, February 29, March 1, and March 2 (Wednesday through Friday). Potential of related financial industry tours in this east coast financial hub.
2. Estate Planning Pre or Post Conference at 2011 August Update.
 - What **basic** professional development* will be offered (primarily for those not on the team) related to this priority in the next year?
*** LSYFF: Organizing Section presented at August Update 2011 as a general session.**
- *Enter these professional development opportunities into the professional development catalog by **August 1**.

Evaluation

3. a) List the short term outcomes in your action plan related to the priority identified in #2. *(Short term outcomes are increased learning...awareness, knowledge, attitude, skills, opinions, aspirations, motivations)*
 - * **Create supporting media articles**
 - * **Promote the use of a notebook as one good way to organize records.**
 - * **Others In progress**

b) List evidence that you will gather that clientele have increased learning: *(ie. Number of those reached who have increased their knowledge or skills about short term outcomes.)*

- **Pre and Post tests**
- **Numbers of people reached in meetings and online**
- **Evaluation instruments that included statements such as:**
- **"I learned _____ as a result of this meeting / material**

4. a) List the medium term outcomes in your action plan related to the priority identified in #2. *(Medium term outcomes are action changes...behaviors, practices, decisions, policies, social action)*

- **Identify and inventory important family papers.**
- **Organize, obtain, &/or replace important family papers.**
- **Set realistic goals for organizing records**

b) List evidence that you will gather that clientele have changed their actions. *(ie. Number of those reached who have changed their behaviors or practices about medium term outcomes.)*

- **Encourage the use of 30-60 day follow-up (phone, survey, etc) about intended actions taken.**
- ***Base follow up questions on intended Goals: "I intend to a.---, b.-----, c.-----"**
- **Solicit and Collect Anecdotal Comments**

5. a) List the long term outcomes in your action plan related to the priority identified in #2. *(Long term outcomes are condition changes... social, economic, health, civic, environmental)*

- **Update personal net-worth statement regularly throughout lifetime and to make it easier for loved ones at death.**
- **Complete income and estate tax; pay not more than needed.**
- **Make plans to transfer all assets in a way desired.**

b) List evidence that you will gather that conditions have changed. *(ie. Number of those reached who have improved long term outcomes.)*

- **People know what they have, who owns it, what it's worth.**
- **People take actions that result in having enough assets to last a lifetime.**
- **People take ownership: Personal responsibility for your own well-being results in fewer people being supported by social programs—move away from social dependence.**

Signature Programs

K-State Research and Extension leadership will soon be identifying several programs with plans for implementation in the 2011-2012 program year for which we would like to be widely recognized. These programs and their impacts will be supported with focused marketing and promotion. Criteria to be considered for a Signature Program include:

It must:

- be identified in a Program Focus Team action plan
- address an issue of importance to a significant number of local units
- have the ability to be replicated
- provide easily administered evaluation assessment tools for agents to use

When incorporating the above criteria, Signature Programs reinforce our committed goal of providing high quality programs to our clientele, helping to convey the public value of Extension across the state.

Suggest one or more signature programs related to this action plan:

Legally Secure Your Financial Future: Organizing Records.

Return to Margaret Phillips Margaret@ksu.edu immediately following spring conference

4/5/2011