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**Financial Literacy for Families**

**Train the Trainer Module 1**

## To introduce the Money Matters Financial Literacy Train-the-Trainers Programme and the concepts of Family Learning.

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| Module 1: | | | |
| Aim: | To introduce the Money Matters Financial Literacy Train-the-Trainers Programme and the concepts of Family Learning. | | |
| Learning hours  Total hours: | Contact time  3 hours | Self-study  2 hours | Notes |
| Learning Outcomes: | **On successful completion of this module, learners will be able to:**   * give an overview of the Money Matters programme * explain the importance of using a Family Learning approach * consider the knowledge and skills related to financial literacy | | |

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| Session Plan module 1 | | | | | |
| Timing | **Activity** | | **Delivery**  **Method** | **Resources** | **Notes** |
| Before attending | Pre-course survey to be emailed for completion | | Email | Online Survey | Survey to find  out people’s starting points. |
| 5 mins | **Welcome**  **Learning Outcomes (LO)**  Plan for the session  Introduce the visual plan giving a brief overview and any housekeeping/notices. | | PowerPoint | PP2- LO  PP 3-Visual session plan | Invite questions |
| 5 mins  15 mins | **Activity M1.1**  **Warmer**  “Find Someone Who…”  Participants mingle and ask each other questions from **Handout M1.1** putting names next to those who answer “yes” | | *If online - participants cover cameras with hand and facilitator reads statements, those who agree uncover camera to see who else agrees.* | Handout **M1.1:** “Find Someone Who…”  PP 4 - Warmer | Note responses and levels of engagement and participation. |
|  | **Activity M1.2**  **Introductions and Expectations**  Each participant to introduce themselves and say one of the statements they agreed with, and one thing they want from the course, then nominate next person.  Notes people’s expectations on flipchart/document. | |  | PP5 introductions and expectations |  |
| 10 mins | **Activity M1.3**  **Group Agreement**  Ask participants to suggest ways they should work together to get the most out of the course, write answers on flipchart or whiteboard. Include: timekeeping, phones on silent, respect, confidentiality asking questions etc.  Keep answers and write up on flipchart/document for future sessions. | | *Use online whiteboard or suitable collaboration tool if online* | Whiteboard/ flipchart  PP6 | Note responses and levels of engagement and participation.  Encourage *participants to feel their opinions and ideas are being listened to and included in our thinking.* |
| 10 mins | **The Money Matters Programme Overview**  Show slides giving program overview (PP8), outline resources (PP9) and different target groups, show course content for each day with aims of each module and badges (PP10-12) plus self-directed learning. (PP 14) Invite questions | | PowerPoint | PP 7-14 | Check understanding and invite questions |
| 10 mins | **Activity M1.4**  **A Family Learning Approach**  Ask participants to “brainstorm” what they think a family learning approach means. You can use the following prompts-   * What makes it family learning? * What are the aims? * When does it work best? * What is it like?   Write answers on whiteboard or flipchart. | | *Use online whiteboard or suitable collaboration tool if online* | PP 15  Whiteboard/flipchart  PP 16 – suggested responses | Note responses and levels of engagement and participation. |
| 20 mins | **Activity M1.5**  **True or False**  **Introduce the aims of family learning and family learning underpinning principles.**  Give out the True/False statements, Handout 1.5a and ask participants to complete in pairs. Go through the answers expanding on the key points.  Introduce the underpinning principles of family learning (PP 18-19) and invite discussion - Are any of these more important than others? Any surprises? Do children have to be in the training at the time? Give out the principles Handout 1.5b | | PowerPoint  *If online only, put true/false Handout 1.5a on screen and complete together* | PP 17 – True or False  Handout M1.5a True/False  PP 18-19  Handout M1.5b Principles of Family Learning | Note responses and levels of engagement and participation. |
| 15 mins | **Activity M1.6a**  **Creating a positive learning atmosphere and good group dynamics in a family learning situation**  1) In pairs ask participants to think of a class or positive learning experience they enjoyed, to tell their partner about and to say what they liked using some key words or short phrases to write on 2 or 3 sticky notes. Facilitator guides and encourages.  **Activity M1.6b**  2)Ask participants to come up to the board (or online) and put their stickers under the headings:   * environment * role of tutor * other factors to consider   3) Facilitator notes some key points  from sticky notes and refers to PP  **Note the tutor/facilitator** is key in creating a positive atmosphere, briefly eliciting 2 or 3 ideas from the group for creating good dynamics in their own classrooms - praising all responses.   1. Acknowledge family learning may take place in unconventional settings. 2. Maintain that the role of the tutor is important for setting the atmosphere and creating good group dynamics.   Highlight the role the tutor has in helping siblings and carers to value all contributions. | | *Use online whiteboard or suitable collaboration tool if online*  PowerPoint | PP 20-24  Resource sticky notes  Whiteboard/ flip chart  Resource M1.6b- Transactional analysis | Note responses and whether participants come up with known recommendations or not, encourage discussion and ideas  You may want to acknowledge that dynamics within families may not be perfect and can require careful handling.  For further research look at ’Transactional Analysis (TA)’ and models of behaviour and communication’ |
| Break - 10 mins PP25 | | | | | |
| 10 mins | | **Introduction to the ideas of thinking skills and Financial skills and knowledge - making related to age.**  Keep the introduction simple.  Thinking skills are known as ‘executive functions’ and are the ways of thinking (cognitive skills) that underpin the more specific skills linked to financial decision making developing as children get older.  See note to power points in resources for more detail. |  | PP 26- Introduction to Thinking skills, financial skills and MM resources  Resource M1.7  PP27 – Financial skills and Knowledge | See notes in resources for background information and suggested approach to content.  Participants may ask questions  Note any questions around terminology |
| 15 mins | | **Activity M1.8**  **Are the skills Thinking or Financial Skills?**  Ask participants to work in pairs and put under either Thinking skills or Financial skills. If they are not sure or think they have both skills put them in the middle.  Give out answers and see what people think  **If working online**- try to put a participant more confident with technology with a person who is less confident.  **If short on time**, or working in a small group, do the drag and drop as a whole group together. Encourage contributions from everyone.  Give time for participants to discuss them. | *Use online suitable collaboration tool if online*  *Online*- Use the Drag and Drop in 1.8a powerpoint  *In Class* - 1.8a handouts  Print on paper and cut out and place under headings.  1.8b Answers printed on paper  *If in house print resources cut up purple labels to allow movement.* | PP 28  Resource  M1.8a Questions  M1.8b Answers | Note responses  Note any questions including those on terminology.  Think about linking to a Financial Vocabulary in Module 2 |
| 20 mins | | **Activity M1.9**  **Linking thinking and financial skills with Money Matters - Scenarios**  Ask participants to think about the financial and thinking skills and knowledge underpinning each financial scenario.  Split into 3 groups and ask participants to brainstorm the financial and executive skills and knowledge linked to each scenario.  With the whole group. Allow each small group to share thoughts. Others might add to the ideas.  Ask the whole group to think about the **age of children and young people** when it might be appropriate to introduce a discussion about each scenario? **6-12, 13-18, 19-25**  Which scenario/ age group would be best in a **comic, escape room or app**? |  | PP 29-32  PP30- M1.9a  PP31-M1.9b  PP32- M1.9c    **Handouts**  M1.9a  M1.9b  M1.9c  PP33 |  |
| 25 mins | | **Activity M1.10**  **Linking thinking and financial skills with Money Matters** - **3 types of resources for the Money Matters project.**  Split into 3 groups. Each group explores one type of MM resource either an app, a comic book or an escape room.  Ask participants to explore resources and consider how they work. Do they include the thinking and financial skills and knowledge and how they could be used in a family learning situation.  Perhaps they can even come up with better ideas linked to each scenario.  Come back together as a whole group and introduce the resource they were looking at and say how it worked and how it could be improved. | *Links to Toolkit with MM resources* | PP 34 |  |
| 10 mins | | **Self study tasks:**  Read Transactional analysis handout and consider your own delivery and learning styles.  Go online to the Money Matters Financial Literacy Library to complete the Digital Badge for Module 1.  **Thank you** |  | PP 35  PP36 |  |
| Total 180 mins | |  |  |  |  |