

Create an Action Plan

Creating an advocacy action plan helps define the specific actions that will lead you to your ultimate goal. An action plan is helpful in breaking a big task into smaller, actionable steps and identifying who will be responsible for each task. You can start by identifying a goal(s), the key players who will help you achieve that goal, and the message you will deliver to each of the key players. There are different ways you can develop an action plan. Below is one example of a plan that guides you to think about the actions you can take to achieve your desired outcome.



Inputs

Consider the resources you have available or that you will need. These may include an advocacy team, evidence about the value of financial education, and evidence of the need for financial education in your area.

Activities

Planned action steps you can take to influence policy, raise awareness, and get the community involved.

Outcome

The desired result of your actions. This may include partnerships and individuals mobilized to take on projects.

Policy Goals

What policy changes are you seeking? For example, are you hoping a policy maker will agree to promote a graduation requirement or the adoption of financial literacy standards in your district?

Impact

The end result of your action plan is that students leave high school with an adequate foundation of financial knowledge, ready to take on the many financial responsibilities facing them.



Tool: Advocacy Plan (example)

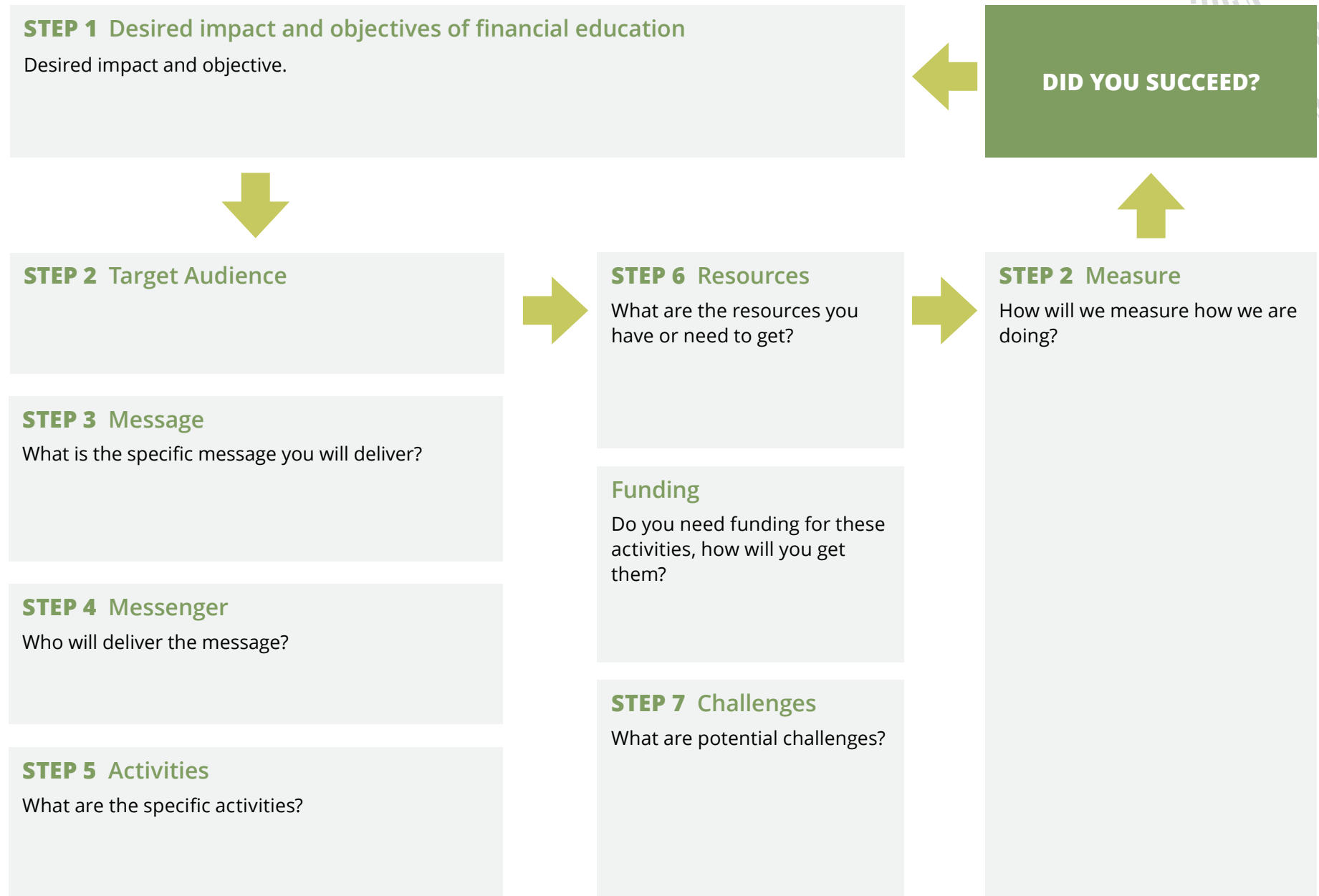
| Inputs | Activities | Outcomes | | Policy Goals |
|---|---|---|--|---|
| <p>Build the team</p> <ul style="list-style-type: none"> Establish a team Identify a champion Find funding opportunities <p>Plan</p> <ul style="list-style-type: none"> Understand current status of financial education Identify key players in education Develop key messages | <p>Policy</p> <ul style="list-style-type: none"> Develop a policy proposal Build relationships with decision makers <p>Outreach to the Community</p> <ul style="list-style-type: none"> Conduct polls and surveys Build your network Get the media involved Circulate petitions | <p>Advocate</p> <ul style="list-style-type: none"> Attract new advocates Establish partnership with local nonprofits | <p>Policy</p> <ul style="list-style-type: none"> Increase awareness Establish a base of support Prioritize financial education as a policy issue | <ul style="list-style-type: none"> Get a bill introduced that requires financial education in high school <p>Impact</p> <ul style="list-style-type: none"> Improved youth financial literacy levels Improved financial habits of constituents |
| <p>Influencing Factors</p> <ul style="list-style-type: none"> Economic climate of the area What other issues are in competition? | <p>Stakeholders</p> <p>District school board, parents, students, other teachers, state treasurer, attorney general, state commissioner, local credit unions, other advocacy groups, state legislators.</p> | | | |

Tool: Advocacy Plan



| Inputs | Activities | Outcomes | | Policy Goals |
|--|---|------------------------|----------------------|----------------------|
| <p><i>Build the team</i></p> <p><i>Plan</i></p> | <p><i>Policy</i></p> <p><i>Outreach to the Community</i></p> | <p><i>Advocate</i></p> | <p><i>Policy</i></p> | <p><i>Impact</i></p> |
| <p><i>Influencing Factors</i></p> | <p><i>Stakeholders</i></p> | | | |

Tool: Action Plan for Each Stakeholder (example)



Resources:

- West Virginia's Department of Education created a sample [School Action Plan](#) that lays out strategies and activities for each goal.
- [Vermont's Financial Literacy Action Plan](#) may offer additional ideas on creating an action plan.
- The [American Library Association](#) provides an [advocacy action plan workbook](#) that can be adapted for financial education.

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In 2011, the Center for Financial Literacy at Champlain College held a financial literacy summit to discuss the state of financial literacy, K-12 financial education, and the policy environment in Vermont. Stakeholders participating in the summit included K-12 educators, school leaders, academics, and government officials. The Center developed a national report card that graded each state's efforts to improve financial literacy in high school. They gave their state of Vermont a "D."

On learning how poorly it was doing, Vermont established a [task force](#), launched in 2014 by Champlain College's Center for Financial Literacy, to develop a strategy to improve financial education efforts. In 2015, the Vermont Financial Literacy Commission was created. The commission collected testimony to understand the current state of financial education and demonstrate the need for programs. The commission produced a report of their findings and recommendations in [2017](#) and [2018](#). Through a [Financial Literacy Working Group](#), Vermont will continue to evaluate how financial education is delivered. This success story shows the value in doing assessments that serve as a baseline against which to measure efforts to improve financial education.