

**PEACE MFI S. CO Branch Manager Training –
Lenege Youth Savings Program
March 2012**

Day/Time	Topic	Facilitator	Handouts	Activity / Content	Venue
DAY 1					
8:00 – 9:00	Greetings from Management		Lenege Training Schedule		
9:00 – 10:00	Introduction to Lenege		Lenege Training power point printout	<ul style="list-style-type: none"> • Why youth financial services? • What is Lenege? • Where can we engage youth? • Role of financial education • Youth asset-building • Segments identified in market research • Performance targets • Product description • Process mapping • Marketing, outreach, and incentive strategy 	
10:00 – 10:15	Tea break				
10:15 – 12:30	Lenege Policies and Procedures		<ul style="list-style-type: none"> • Process Maps • Casi Forte (Lockbox) distribution procedures • Passbooks • Savings goal sheet • Savings goal visual • Lenege Application form 	<ul style="list-style-type: none"> • PEACE MFI S. CO Youth Savings Manager will role play an account opening and withdrawal/deposit (with branch manager volunteer to role play a client) • PEACE MFI S. CO Youth Savings Manager will role play casi forte distribution process (with branch manager volunteer to role play a client) 	
12:30 – 1:30	Lunch				
1:30 - 2:30	Lenege Policies and Procedures – continued				

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2:30 – 4:30	Back office Processing and Reporting		Savings ledger	<ul style="list-style-type: none"> • PEACE MFI S.CO Finance and Account Manager will review savings calculation. Branch Managers will practice on the worksheet. • PEACE MFI S.CO Finance and Account Manager will walk staff through the posting process for the new ledger. Branch Managers will practice. • PEACE MFI S. CO Youth Savings Manager will go through reporting procedures through demonstration on projector 	
4:30 - 5:00	Test		Test sheet		
DAY 2					
9:00 – 10:30	Marketing Strategy		<ul style="list-style-type: none"> • Present Marketing Materials: posters, banner, fliers • Outreach planning sheet • Present incentives 	<ul style="list-style-type: none"> • Fill in outreach planning sheet based on each branch's operational area • Visit branch to review layout • Visit school to review message board 	
10:30-11:00	Tea Break				
11:00 – 12:30	Financial Education		<ul style="list-style-type: none"> • Financial Education Guide 	<ul style="list-style-type: none"> • Explain objectives of financial education; how Lenege is incorporated, etc. • PEACE MFI S.CO Youth Savings Manager to deliver training-of-trainers session on financial education delivery 	
12:30 – 1:30	Lunch				

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1:30 - 3:30	Financial Education		<ul style="list-style-type: none"> FE guide 	<ul style="list-style-type: none"> Continue TOT Provide opportunity to practice Get feedback from participants 	
3:30 - 4:30	Questions and Future participation		<ul style="list-style-type: none"> Rollout Checklist 	<ul style="list-style-type: none"> Discuss expectations for future participation with Lenege program Review rollout checklist Questions 	
4:30 - 5:00	Test – Closing		Test sheet		