IDEAS TO PRACTICE

Tool 1: Idea Capture and Prioritization

Use this worksheet to generate ideas that will fuel your organization's planning for promoting savings at tax time or other organizational goal.

For group exercises	YOUR NAME:	INTERVIEWER NAME (IF COMPLETING AS A PAIR ACTIVITY):

Getting started

1 **Organizational goal** (What we are trying to do or change through this process?)

2 **Featured promising practice** (optional)[1]

---

[1] See CFPB white paper *Building the Capacity of Tax Preparation Providers to Encourage Saving* for identification of 10 promising practices. You or the person facilitating your planning session may select one of the 10 promising practices in tax time savings to be the focus of your idea capture and reflection. NOTE: Some approaches to achieving tax time savings goals may be broader than the CFPB promising practices, such as increasing the number of volunteers staffing tax sites or attracting different taxpayer populations to sites.

Consumer Financial
Protection Bureau

Step 1: Identify ideas your program might implement to achieve the goal

1 **Name practices or activities other programs use that you think your program should consider.**

2 **Name practices or concepts you learned about from experts through presentations, online, or other ways that have potential.**

3 **List any of your own ideas or thoughts about ways to achieve your organizational goal or implement the promising practice you identified above.**

4 **List anything else you want to capture?**

Step 2: Select four ideas for further consideration

1 **From the Ideas above: What are four favorites that you want to implement?**

Give priority to ideas that:

- Others in your planning group may not have thought of.

- Have strong potential to advance your organization's goal for tax time savings encouragement.

- Are realistic, even if they do require extra effort.

IDEA 1:

IDEA 2:

IDEA 3:

IDEA 4:

Tool 2: Prioritization Grid provides a way to combine these ideas with the ideas of others and select a few ideas for further planning.

Consumer Financial
Protection Bureau