

can take to get there. Provide the participants with the “What is Person-Directed Planning” handout.

Before beginning the person-directed planning process, explain the steps and go over the rules in the Student Guide. Explain that, for the purposes of this course, their Person-Directed Plans should concentrate on personal finances, although these plans are often used to help with other aspects of a person’s life and their goals and dreams.

Money Basics is a peer-led and *person-directed* financial empowerment course. What this means is that we will be incorporating a number of person-directed planning ideas and processes in these workshops to center the individual and their unique experiences, strengths, skills, goals, and dreams when creating plans for their future. By doing so, we hope to create a sense of agency and empowerment among participating peers.

Improving one’s financial well-being is their own unique, personalized process. Participants know themselves best and can identify the tools, supports, and resources that will work best for them. This type of planning enables an individual to be in charge of their finances and their future and to recognize the many strengths and abilities they already have.

### **Activity:**

Facilitators will guide the participants through the PDP worksheets (Workshop 2 Worksheets), which will be done individually, in pairs, or in small groups. Ask the class which option they prefer.

Facilitators can give verbal examples for each section or have prepared PDPs on display. These can be fictitious examples prepared ahead of time, which could provide an opportunity to add humor by using celebrity names or pop culture references. Participants will follow the instructions in the Student Guide to fill out the Workshop 2 PDP Worksheets.

#### **Step 1: Life Now** (5 minutes)

If in-person, ask the participants to fill out the *Life Now* worksheets in their Student Guides, Workshop 2 Worksheets, or on sheets of poster paper in the classroom. If online, have the participants work on each worksheet on their own or divide the class into pairs or small groups and put them in Break Out Rooms for this activity.