

WORKSHOP TWO: SETTING FINANCIAL GOALS

Advanced Preparations for Workshop 2:

Set-up: Prepare room for class with adequate chair/table arrangement and sign-in sheets. Set up projector and PowerPoint slides. If facilitating an online session, set up the slides and Zoom meeting room.

Materials Needed For This Class:

1. Attendance sheet
2. Whiteboard
3. Facilitator Guide
4. Student Guide: Workshop 2
5. Laptop & projector
6. PowerPoint slides: Workshop 2
7. Workshop 2 PDP worksheets (editable documents/pdfs or print copies)
8. Poster paper, markers, tape (in-person)
9. “What is Person-Directed Planning” Handout
10. Writing paper and pens

Learning Objectives:

Upon conclusion of Workshop 2, participants will:

1. Have a basic understanding of person-directed planning and why it can be useful
2. Create their own Person-Directed Plan
3. Create an Action Plan for achieving their financial goals

Welcome Back & Group Sharing

Facilitator:

Suggested time: 10 minutes

Materials: PowerPoint slides; attendance sheet; registration forms; Community Agreements; homework assignments (money saving ideas)

Teaching:

Welcome back the participants and take attendance. If there are any new participants, welcome them to the class, update them on what they missed last class, and ask them to fill out the *Demographics & Registration Form*, *Class Topics Form*, and *Pre-Class Questionnaire*.