



Encouraging Financial Conversations: Empowering frontline staff to help clients take charge of their financial futures

Encouraging Financial Conversations is a program designed for case managers, frontline staff and other helping professionals to help empower clients to achieve their financial goals and manage their money. Participants learn techniques and strategies to help their clients create a financial goals action plan, build and maintain good credit, pay off debts, develop a spending and savings plan, and protect themselves from fraud and identity theft.

Extension educators have conducted seven of these 8-hour courses online with 129 participants since November 2020. Participants complete a pre-survey, post-survey, and then a follow-up survey two months after the end of the course. Follow-up program surveys show these results:

Workshop participants reported **statistically significant improvements** in these areas: 1) increased comfort level working with clients on financial matters, 2) feeling prepared to bring up a financial topic with their clients, and 3) understanding the role they can take in working with clients on financial concerns.

Within 2 months after participating in the course, the majority of learners (78%) reported using resources to hold financial discussions with clientele. In addition, more than two-thirds of participants (69%) have also applied the course information to their own finances.

Just over half of participants had already visited recommended websites, explored financial resources, and shared the course information with family, friends, and co-workers.

What People are Saying

“Considering that I will be working with clients that will need help budgeting, **this course was so informative**, even for myself. The goals section stood out to me, starting with small goals is what is necessary to succeed.”



“This can be a daunting topic especially with low-income families. I really appreciated the conveyed understanding that there's emotional aspects to spending.”

“**I acquired lots of resources to use with clients on their unique situation** and ways to help them.”

Achieving More Together

UW-Madison Division of Extension works alongside the people of Wisconsin to deliver practical educational programs where people live and work – on the farm, in schools and throughout urban and rural communities. With educators in all 72 counties, on 5 campuses and within 5 tribal nations, we're helping our neighbors put their own great ideas into practice with the support of our expertise, resources and university research.