

Improving Evaluation and Metrics in Youth Financial Education
AGENDA (DRAFT)
October 28-29, 2010

DAY 1

8:00 A.M. Registration and Breakfast

8:30 A.M. Introduction and Welcome

8:40 A.M. Opening Remarks

“The Challenges of Evaluating Youth Financial Education: A Call to Action”

Mike Staten, University of Arizona

Provide the context for the meeting, outline why this is such an important topic, and raise the questions that the agenda will try to address and why we thought these were the important questions to focus on.

9:00 A.M. Roundtable: The Current State of Research in Youth Financial Education

Participants will briefly share current financial education research projects underway to help familiarize the group with individual areas of interest and provide a quick update on the latest research in the field.

10:30 A.M. Break

11:00 A.M. Understanding How Youth Learn

Presentation: Theories of Adolescent Learning: Teacher Interaction and Classroom Based Learning, Frank Worrell, Professor, Graduate School of Education, UC Berkeley

Group Discussion:

- What are the foundations for successful youth learning?
- What are the factors that influence youth learning: time horizons, peer networks, social influences, and family context?
- What are important differences we should be considering within the youth population, e.g. age, gender, socio-economic/cultural background?

12:30 P.M. Lunch

1:30 P.M. New Frontiers in Financial Education Evaluation

Presentation: International Innovations in Financial Education Delivery and Evaluation, Angela Lyons, Associate Professor, Department of Agricultural and Consumer Economics, University of Illinois

Group Discussion:

- What are the challenges we face in designing and evaluating financial education programs for youth?
- How do we overcome those challenges? How can we be more creative and innovative in our approaches?
- How do we design and implement effective evaluations?

3:00 P.M. Break

3:30 P.M. Measuring Program Success: Choosing Metrics and Indicators
Presentation: The Challenge of Defining Standardized Metrics of Success, Jeanne Hogarth, Federal Reserve Board of Governors

Group Discussion:

- What are the challenges we face in choosing appropriate metrics?
- What metrics are appropriate in evaluating youth financial education, for the short-, medium- and long-term?
- What innovative strategies can we design for developing metrics that capture financial capability?

5:00 P.M. Networking Reception at the Fed Center
Join us at the Federal Reserve Bank of San Francisco's museum, which includes the largest collection of historical US currency, for a networking reception.

DAY 2

8:00 A.M. Breakfast and Networking

8:30 A.M. The Landscape of Youth Learning: Social Context, Peer Networks and Technology
Presentation: (TBD) "Lessons from Marketing: Innovations in Reaching Youth"

Group Discussion:

- How do we become be more creative at reaching different youth populations, e.g. ?
- How do design financial education programs and evaluation that allows us to take into account peer to peer interactions, social and family context?
- How does financial education need to be tied to social education?

10:00 A.M. Break

10:30 A.M. Influencing Policy: Achieving Universal Coverage of Financial Education
Presentation: Financial Education Policy: Current Opportunities and Challenges, Richard Todd, Federal Reserve Bank of Minneapolis

Group Discussion:

- How can we be more intentional about structuring evaluation so that it can help to shape financial education policy?
- How can we be more creative about disseminating and communicating the relevance of financial education research?

12:00 A.M. Wrap-up and Concluding Remarks

12:15 P.M. Adjourn