TOOL 8: Current Program Workflow

INSTRUCTIONS

The left column lists the basic components of program workflows. In the remaining columns, describe each component of your target program (the program into which you are integrating financial capability services), including processes and places where financial topics are already discussed. You can use the information in this tool to create a flowchart.

What you need to complete this tool:

- ☐ Information about each component of the target programs(s) into which you are integrating financial capability services, including outreach, intake, start of services, main service activities, program exit, and follow-up.

TOOL 8: Current Program Workflow

Use the table below to map out the existing workflow of each of the target programs into which you plan to integrate financial capability services. You will use this information in Tools 9, 10, and 11 to identify points in this program workflow where/when financial capability will be integrated. *You should complete a separate table for each target program.*

TARGET PROGRAM	

Components of Program Workflow	**Current Program Workflow** Briefly describe how each of the workflow components at left currently operates in your program.	**Key Activities or Milestones** Identify the key activities that occur or any milestones achieved by the client during each program component.	**Financial Topics Present?** Note places where financial topics are already discussed in the program components or key activities.
Outreach *Identify the ways that clients learn about this service/get connected to it.*			
Intake and Registration *Describe who does this, how it's done, and what information is collected.*			

TOOL 8: Current Program Workflow (cont'd)

Components of Program Workflow	Current Program Workflow	Key Activities or Milestones	Financial Topics Present?
Start of Services *Describe the first service delivery engagement for the program.*			
Main Service Activities* *Provide a brief description of services by:* • *Type (1-on-1 or group)* • *Frequency of activity* • *Duration of client participation* • *Which staff interact with clients* * If you create a program flowchart from this information, you may need to create separate boxes for the main service activities.			

TOOL 8: Current Program Workflow (cont'd)

Components of Program Workflow	Current Program Workflow	Key Activities or Milestones	Financial Topics Present?
Program Exit *Describe when exit occurs and what happens at that time.*			
Follow-up *List any follow-up activities, who performs them, and when they take place.*			
Other			