



The Power of One: Building A Financial Wellness Program With Limited Resources

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Key Takeaways

- Key areas to focus on with a new program
- One-on-One Coaching path to success
- Leveraging relationships to strengthen a small office
- Emergency Fund 101
- Assessing and Surveys

Know Your Audience

- Leverage your schools mission and values
- Use existing research
- Orientation Fairs and Events
- Student Organizations

Tip: Incorporate financial wellness questions into existing college wide surveys.

Coordinated and Multi-Faceted Approach to Financial Education

- Financial Wellness Committee
- Summer Down Time Meet and Greet
- Student Interns
- Professional Organizations/Mentors

Tip: Arrange short meetings with individuals on campus to introduce your program and how you can fit content into already existing initiatives.

Where to Begin?

- Game of Life
- April (Financial Literacy Month)
- Start Smart Workshop (something timely and connected to real life)
- Online Financial Literacy Platform/Online Content
- Social Media Presence

Tip: Utilize national campaigns to enrich your content.

One-on-One Coaching

- Appointment Scheduling
- Intake and Exit Surveys
- Certification

Tip: Make scheduling an appointment as easy and convenient as possible for both you and your students.

Emergency Support Fund

- Red Thread Grant
- One-on-one meetings
- The Hope Center Research

Tip: Create a simple online application with clear guidelines.

Assessment/Surveys/Google Forms

- Logic Model Assessment
- Coaching intake/exit survey
- Paper Survey/Jar Method

Tip: Be mindful of what questions you want answered then build your surveys around them.

Wrap Up

- Have questions?
- Would like to share ideas?
- Examples of anything I have talked about?
- Contact me! Email: smithsa@denison.edu

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Links