FL4 ALL

Financial Literacy for All PLAYBOOK

What is the FL4A Playbook?

This playbook serves as a comprehensive internal resource for the Financial Literacy for All (FL4A) initiative. It provides team members with a centralized reference guide containing all essential information about the program's mission, implementation strategies, and available resources.

The playbook ensures consistent understanding of the FL4A structure and objectives, outlines key documentation locations, and establishes standardized protocols for delivery. By consolidating this information, the playbook supports effective collaboration and equips all team members to confidently advance the organization's financial literacy goals.

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About Financial Literacy for All

About Financial Literacy for All

WHAT IS FINANCIAL LITERACY FOR ALL?

Financial Literacy for All (FL4A) is a national initiative to embed financial literacy into American culture – for all, and for good.

Led by a prominent group of leaders from the business, sports, entertainment, and nonprofit sectors, our mission reflects this truth: **financial literacy must be a cornerstone of any effort to disrupt poverty, alleviate financial struggle, and help everyone seeking to reach their financial capability and realize financial security**.

Over the next ten years, through a series of programs and awareness campaigns, we will begin to reshape, rethink, and reimagine the way we think about our relationship with money.

About Financial Literacy for All

FOUNDING MEMBERS

Co-Chairs

John Hope Bryant
Founder, Chairman & CEO
Operation HOPE, Inc.

Doug McMillon
Chief Executive Officer
Walmart

Tony Ressler
Co-Founder
Ares Management

CEO
The Walt Disney Company

Brian Moynihan
Chairman and CEO
Bank of America

Sal Khan
Founder and CEO
Khan Academy

Ed Bastian
Chief Executive Officer
Delta Air Lines

Adam Silver
Commissioner
NBA

Roger Goodell
Commissioner
NFL

Dan Schulman
Founder, CEO/President Emeritus
PayPal

CEO
Walgreens Boots Alliance

About Financial Literacy for All

Our Mission

To embed financial literacy into our culture by engaging young people and adults where they learn, work and celebrate. We seek to provide everyone in the nation with the tools they need to make confident financial decisions that improve wellbeing for themselves, their families, and their communities.

We Believe

We believe that financial literacy is a civil rights issue for this generation. Financial literacy empowers all of us to make smart decisions – how to budget, save, borrow, and invest. It helps us buy a car, a house or pay for school. Conversely, the lack of financial knowledge creates barriers to fully participate in the economy and, in turn, the American Dream.

FL4A Strategy and Goals

By the end of 2025, we aim to make FL4A a driving force behind embedding Financial Literacy into the foundation of America.

FL4A Workspace

Member Onboarding

Member Onboarding

Onboarding Journey

PRE-ORIENTATION ADMIN

- Set up VIP Access to FL4A Member Portal and Financial Literacy Resource Directory (if revamped)
- Secure contact info from FL4A Lead
- Send Welcome Email with request to schedule Welcome / Orientation
- Add Member card to Trello
- Update CRM (Salesforce)

WELCOME / ORIENTATION

- Review Terms of Engagement
- Introduction to FL4A Operating Model and Workstreams
- Talk about importance of Impact Submission
- Introduce Engagement Toolkit
- Walk-through Member Portal, (if revamped)
- Annual Member Meeting
- Confirm Primary Contact
- Determine future meeting cadence
- Confirm logo usage and Press Release preference (Member- or FL4A-Driven)

PRESS RELEASE (Member-Driven)

- Member creates Press Release
- Sends to HOPE for feedback / approval
- Shares with HOPE for posting on our social media

PRESS RELEASE (HOPE-Driven)

- Submit Podio request to MarComms for Press Release (PR)
- Forward draft PR to member for review
- MarComms makes any necessary edits
- Send to Kevin Boucher for final approval
- Post press release and send finalized version to new member

Terms of Engagement

For the purposes of an FL4A membership, this Terms of Engagement is a non-binding agreement that defines the expectations and obligations of both Operation HOPE and its FL4A members, ensuring a smooth and productive relationship.

YOUR CEO'S COMMITMENT TO FL4A

COMMITTED: FOR A DECADE

- Recognizing that success will be realized by continuity, stability and steady growth, we ask members for a 10-year commitment.
- To making at least one measurable commitment that will advance the work of FL4A, with metrics reported back once a year, to be included in our Annual Report.

EMBEDDED: IN THE BUSINESS PLAN

- Member commitments are part of a larger internal strategy, embedded in their business plan, enabling the member to better serve their employees, customers and/or communities.

PROPERLY RESOURCED: TO ACHIEVE ITS GOALS

- Members commit to dedicating the appropriate resources to ensure the success of its commitments, in the form of human capital, marketing, IT, creative, thought leadership, products and services, talent and more.

OPERATION HOPE'S COMMITMENT TO YOU

COMMITTED: FOR A DECADE

- To providing you counsel in the framing and execution of your CEO's FL4A commitment.
- To overseeing a national communications strategy for the initiative with marketing, communications and creative support.
- To publishing and distribution of an annual report highlighting the collective national impact of all Members.
- To organizing convenings for Members to exchange best practices and highlight and celebrate impact.
- To publishing regular updates on the initiative to FL4A Members.
- To organizing and maintaining a Resource Directory highlighting "best-in-class" curriculum, data, research, organizations and volunteer opportunities.
- To engaging with local and national financial literacy nonprofits to reduce duplication efforts and highlight opportunities for Member participation and public involvement.

Member Onboarding

MEMBER-DRIVEN

- Member creates press release
- Sends press release to FL4A for review
- FL4A provides feedback
- Member posts final PR
- FL4A submits request in Podio for MarComms to publish PR

FL4A-DRIVEN

- FL4A submits request in Podio for MarComms to create press release
- First draft sent to new member for review
- Member sends feedback to FL4A
- FL4A submits feedback to MarComms
- MarComms makes edits and sends to FL4A requestor for final approval
- FL4A sends final press release to member and posts on our social media as well

Press Release Protocol

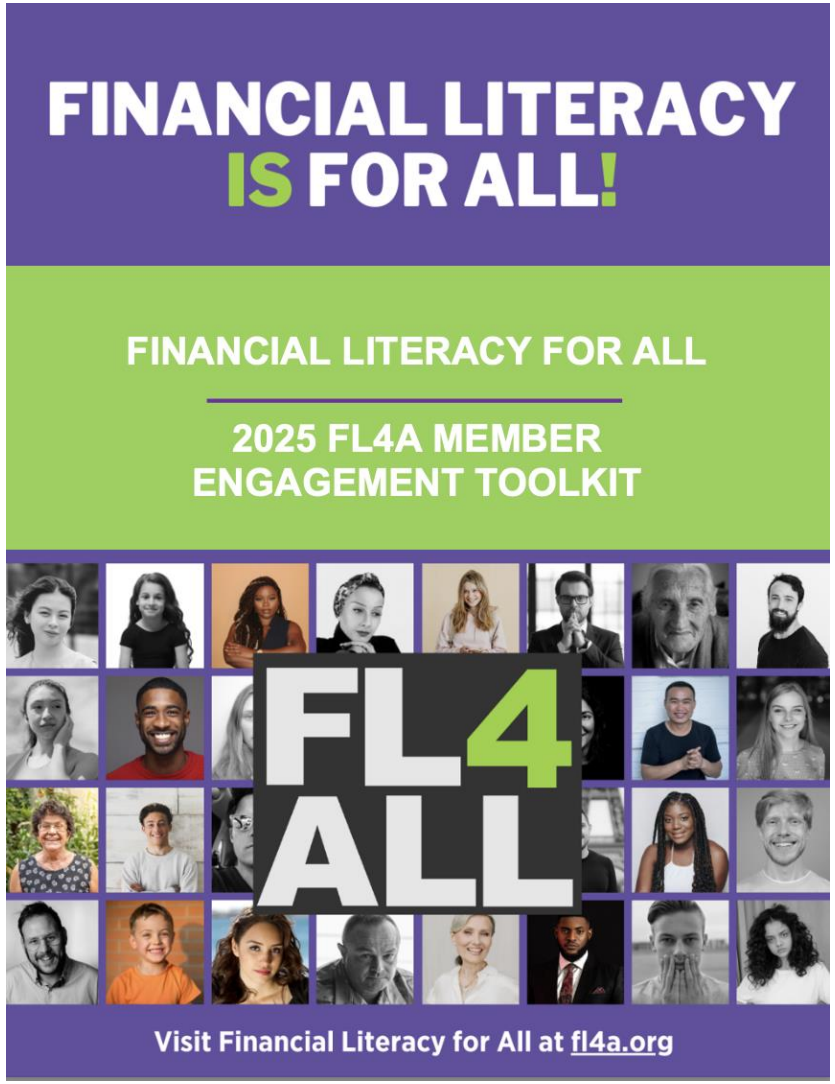
Member Engagement

Member Engagement

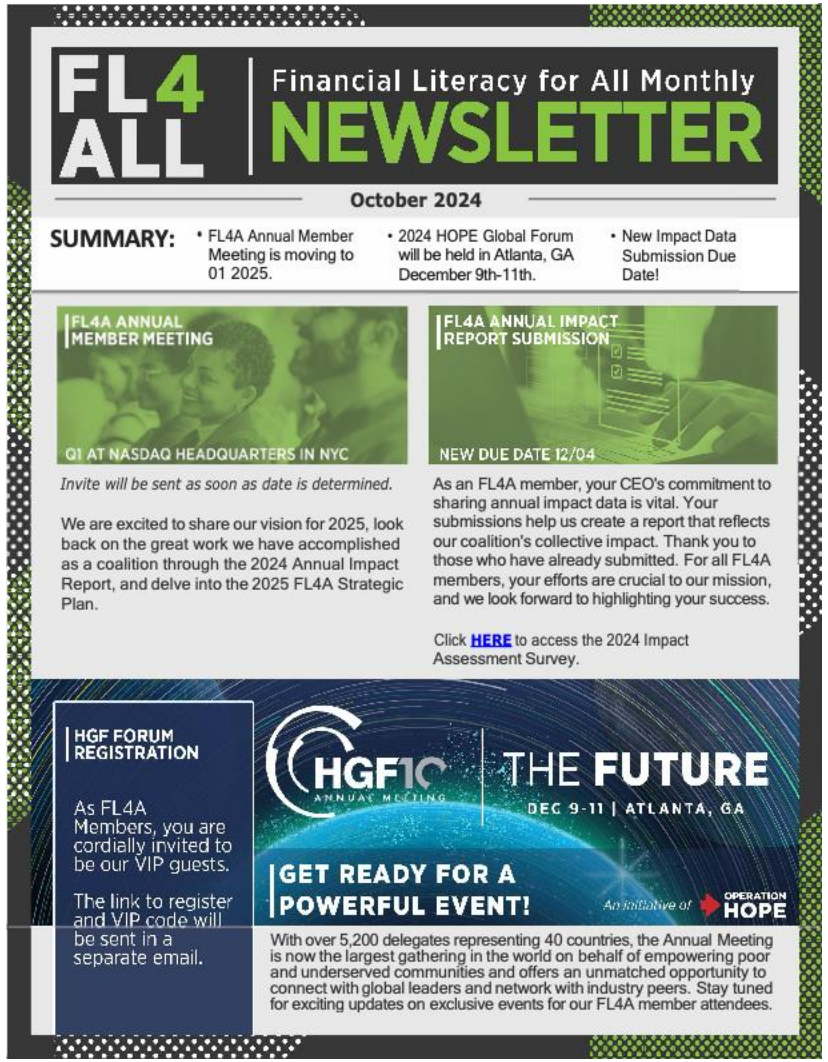
FL4A Member Engagement Toolkit

FL4A's power comes from our Members' individual and collective efforts in support of our mission, and from our Members' individual and collective voices saying loud and clear: our mission matters. Given our Members' breadth and diversity of focus and influence, we should be able to reach every individual in the nation.

To that end, we created the FL4A Member Engagement Toolkit to present ways that Members can engage not only during Financial Literacy Month, but also throughout the year – because every month is Financial Literacy Month for FL4A.



Member Engagement



FL4 ALL

Financial Literacy for All Monthly

NEWSLETTER

October 2024

SUMMARY:
- FL4A Annual Member Meeting is moving to 01 2025.
- 2024 HOPE Global Forum will be held in Atlanta, GA December 9th-11th.
- New Impact Data Submission Due Date!

FL4A ANNUAL MEMBER MEETING

Q1 AT NASDAQ HEADQUARTERS IN NYC

Invite will be sent as soon as date is determined.

We are excited to share our vision for 2025, look back on the great work we have accomplished as a coalition through the 2024 Annual Impact Report, and delve into the 2025 FL4A Strategic Plan.

FL4A ANNUAL IMPACT REPORT SUBMISSION

NEW DUE DATE 12/04

As an FL4A member, your CEO's commitment to sharing annual impact data is vital. Your submissions help us create a report that reflects our coalition's collective impact. Thank you to those who have already submitted. For all FL4A members, your efforts are crucial to our mission, and we look forward to highlighting your success.

Click HERE to access the 2024 Impact Assessment Survey.

HGF FORUM REGISTRATION

As FL4A Members, you are cordially invited to be our VIP guests.

The link to register and VIP code will be sent in a separate email.

HGF10 ANNUAL MEETING

THE FUTURE

DEC 9-11 | ATLANTA, GA

GET READY FOR A POWERFUL EVENT!

An initiative of OPERATION HOPE

With over 5,200 delegates representing 40 countries, the Annual Meeting is now the largest gathering in the world on behalf of empowering poor and underserved communities and offers an unmatched opportunity to connect with global leaders and network with industry peers. Stay tuned for exciting updates on exclusive events for our FL4A member attendees.

FL4A Monthly Newsletter

The FL4A Internal Newsletter serves as both an informational channel and a relationship-building tool, keeping members engaged, motivated, and connected to the larger mission of Financial Literacy for All.

Member Engagement

Member Spotlight

This monthly Member Spotlight is an opportunity to showcase the great work our Members are doing to support FL4A's mission to reach millions of youth and working adults where they live, work and celebrate. Click HERE to see other Members in Action.

FL4A & FICO Partner for Greater Access

Celebrating FICO's Commitment to Empowering Mission-Driven Lenders Through Innovation and Inclusion

FL4A celebrates FICO's commitment to empower mission-driven institutions by offering access to cutting edge tools and resources through its Lenders Leading Financial Inclusion Program.

> "The Lenders Leading Financial Inclusion Program underscores FICO's commitment to helping mission-based lenders responsibly expand credit access and lending opportunities to more people. This is just one of many financial inclusion initiatives that the FICO Scores business has been investing in for the past decade. From the very first FICO Score introduced in 1989, FICO has continuously pushed the bounds of financial inclusion innovation, improving credit risk management, credit access and transparency globally. We're excited to see where this program is headed and how it may empower underserved communities."
> – **Julie May**, vice president and general manager of Scores at FICO

Member Engagement

Quarterly Update Calls

Quarterly update calls with FL4A Members serve as vital touchpoints that maintain momentum and strengthen collective impact throughout the year.

This regular cadence of communication ensures the initiative remains dynamic and responsive, with members actively engaged in advancing our financial literacy goals rather than simply awaiting the annual meeting to reconnect with the broader membership.

Member Engagement

Annual FL4A Member Meeting

The Annual FL4A Member Meeting serves as a pivotal gathering designed to unite our community of members. This meeting provides a structured forum to review and celebrate the year's achievements, including advancing the initiative; facilitating meaningful networking and member collaboration; discussing strategic priorities and program innovations for the upcoming year; and renewing our collective commitment to financial inclusion and economic empowerment.

Member Impact

The Importance of Sharing Impact

Sharing our work strengthens our coalition by fostering accountability, inspiration, and cross-pollination of ideas. When members see colleagues' innovations and outcomes, it sparks new approaches and validates the significance of everyone's contribution to the larger mission. This transparent exchange of experiences creates a living blueprint of what works, allowing us to refine strategies and scale effective practices across communities.

Each success story becomes tangible evidence of our collective impact, helping to attract additional support, resources, and participants. Shared impact ultimately accelerates our progress toward a financially literate America.

Annual Impact Submission

Each year we've committed to assessing the impact of FL4A and Member efforts to advance financial literacy. This is a critical component of our movement and helps us ensure that we are making strides in support of our mission.

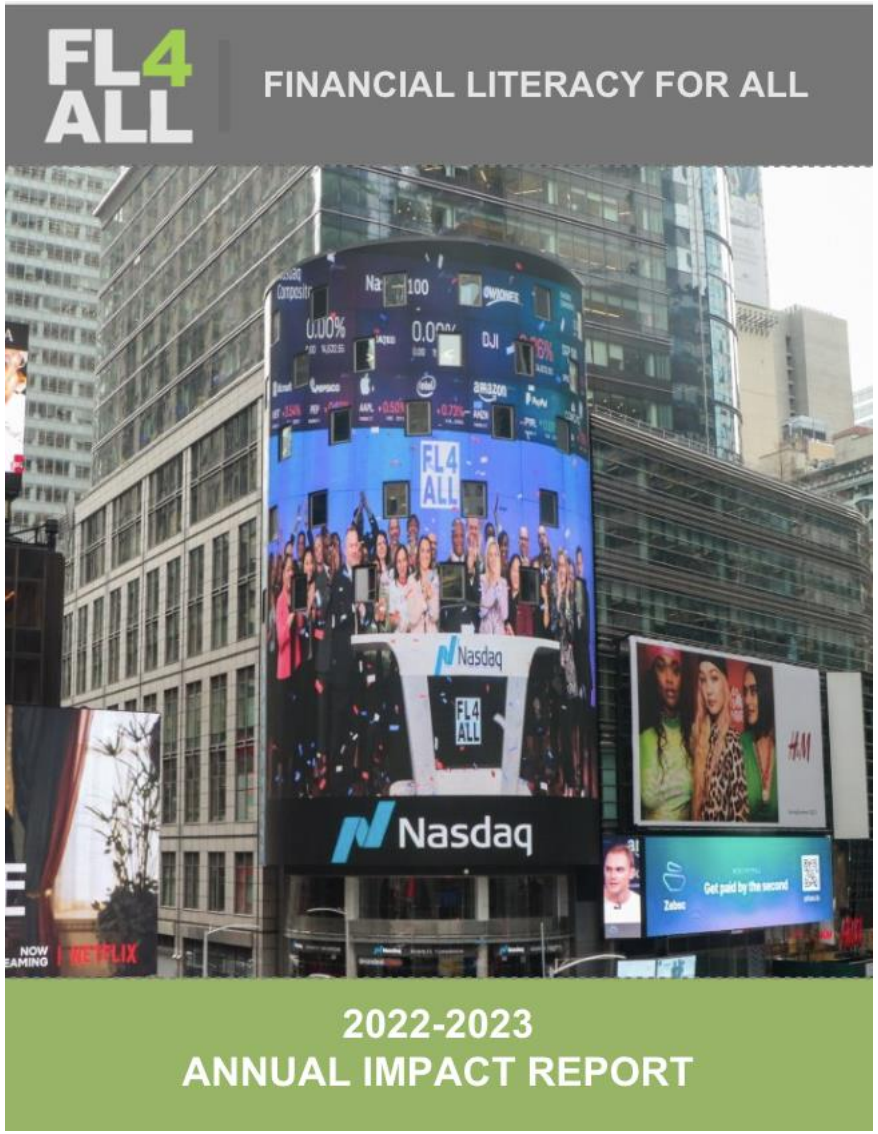
In 2024, a revised data submission process was introduced to help HRII capture and analyze all Member impact data more effectively. Key improvements included:

- Updated questions that support a holistic report across financial wellness programs
- The ability for respondents to view past submissions for future reporting
- Questions that highlight both current impact and future goals of FL4A
- Tracking of total program funding and how much is reinvested in the community

Member Impact

FL4A Annual Report

This annual report acts as a strategic communication tool that builds credibility around the FL4A initiative. By providing accountability to our FL4A members and demonstrating the depth and significance of their impact, this report also acts as a marketing tool to attract future members and funding.



Annual Campaign

Annual Campaign

The Green Socks Day Challenge is a nationwide movement to raise awareness about financial literacy in the month of April. It's a fun, visible way for individuals, families, businesses, and communities to take action, start learning, and support financial education for all.

Click Here to Learn More