

# Service Provider Guidelines

Gen. X & Y  
women, your  
financial future  
is at stake.

## Service Providers – 2010

WiseUp is a financial education pilot project designed specifically to help Generation X and Y women become financially savvy. Indicators of financial security are reduced debt and increased savings/investments.

In order to evaluate the effectiveness of Wi\$eUp, it is necessary that service provider organizations recruit participants who are willing to keep us informed of their progress as they work through the curriculum. As this is a pilot project, we appreciate your help in ensuring that all registered participants complete a brief pre-assessment/survey at the beginning of each chapter, a post-assessment/survey at the end of each chapter, and a follow-up assessment three months after completing Wi\$eUp.

### Service Providers:

1. May be local civic groups, professional organizations, fraternal groups, women-owned small businesses, and corporations – any organization with Generation X and Y women members – with a commitment to expanding knowledge of financial matters to this particular segment of their membership.
2. Will recruit women from their organization to participate in the Wi\$eUp financial education pilot project through September 30, 2009.
3. Will appoint a contact person for the Wi\$eUp Financial Education Program who will be responsible for communication with the Women's Bureau and website coordinator.

### The Service Provider contact person:

1. Will distribute, collect and forward to the Women's Bureau completed registration forms for their participants.
2. Will monitor and encourage the participation of their participants on a monthly basis via the website or personal/email contact with participants.
3. Will advise the Women's Bureau of any change in participants' address, telephone number or email.
4. Will follow the progress of their participants and ensure they complete at least one of the chapters that directly address the goals of the project to 1) reduce debt and/or 2) increase savings/investments (Chapters 4, 5 or 7). To complete a chapter, the participant must submit the pre-assessment at the beginning of the chapter and the post-assessment at the end of the chapter.
5. Will assist in the collection and submission of program assessments before, during and after completion of the Wi\$eUp Financial Education Program and/or as requested.
6. If requested, will complete the Women's Bureau "How to Guide" form and forward it to the Women's Bureau.  
(8/18/08)