

Command Financial Specialist Course Planning Checklist

ANNUALLY

___ Determine dates of training, room and equipment

EIGHT WEEKS BEFORE COURSE: (Date: _____)

___ Co-trainer conference (choose teaching segments, establish lead trainer, determine responsibility for

___ Begin advertising course availability to target population

___ Messages

___ Base e-mails

___ Base newspapers

___ Leadership meetings and trainings

___ Command Representative Program

___ Base marquee

___ POD/POW notes

___ Establish room availability, reserve room

___ Location _____

___ Available day before for setup?

___ Begin registration

___ Keep log of quotas

___ Provide learners with pre-course information: They need to bring their most current LES, a calendar binder, no-cost TAD orders (if needed), and any other locally applicable information requirements. Welcome Letter. It is highly recommended that you also send a "Welcome Letter" to the learner orienting them to the class, and encouraging them to help the learner get the most out of the training during and after the course takes place.

___ Student Manuals: check supply, order more if necessary

___ Check availability of necessary classroom training equipment

___ TV/VCR/DVD Player

___ PowerPoint/Excel projection capability

___ Computer/laptop — CD-ROM capability

___ Classroom Internet hookup

___ Newsprint and easel

___ Whiteboard

SIX WEEKS BEFORE COURSE: (Date: _____)

_____ Coordinate guest speakers, provide chapter from IG or discuss content.

_____ Pay and allowances (Day _____, Time _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

_____ Legal (Day _____, Time _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

_____ NMCRS (Day _____, Time _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

_____ FFSC (Day _____, Time _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

_____ EFM/TRICARE/Housing (choose one) (Day _____, Time _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

_____ Credit reporting agency (Day _____, Time _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

_____ NEX/collections (Day _____, Time _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

_____ Debt-management program (Day _____, Time _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

_____ Navy Mutual Aid Association (Day _____, Time _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

_____ CFS panel—need three experienced CFSs (Day _____, Time _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

_____ Speaker to welcome class on day one — CO/XO/CMC/COS/director (Day _____, Time _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

_____ Speaker to hand out certificates (Day _____, Time _____)

Name: _____ Phone: _____ Confirmed (Date: _____)

FOUR WEEKS BEFORE COURSE: (Date: _____)

_____ Establish availability of computer labs for Tuesday, Wednesday and Thursday group case studies

_____ Establish availability of course certificates of completion

_____ Gather student materials/handouts

ONE WEEK BEFORE COURSE: (Date: _____)

___ Finalize agenda, confirm guest speakers, send base passes and ID requirements.

___ Determine if Level Three evaluation will be conducted on this class.

___ Verify training equipment availability

___ Update Data

___ Update Data for Instructor Guide Chapters

Location	Description	Source for Update
1	Governing Directives	DoD Directives: www.dtic.mil/whs/directives DoN Directives: http://doni.daps/dla.mil
3	Studies and Statistics	www.militaryhomefront.dod.mil/sp/pfm/resources
3	NMCRS Stats	www.nmcrs.org
3	Security Clearance Stats	Contact DoN CAF
4	FPW Living Expense Data	www.dod.mil/dfas (Defense Finance and Accounting Service — Pay and Allowance charts) www.bls.gov (Department of Labor Consumer Expenditure Survey — Average American Family Expenses) www.fns.usda.gov/wic (Women, Infants and Children) www.irs.gov (Earned Income Tax Credit) www.usda.gov/cnpp (Food Plan costs and other data)
5	Pay and Allowance Updates	www.defenselink.mil/comptroller/fmr/07a/ (Financial Management Regulations chapter 7a.) www.militaryhomefront.dod.mil (Pay tables and information) www.dfas.mil (pay tables and information) www.va.gov (update survivor benefit and GI Bill info)
8	FTC Fraud Data	www.ftc.gov/Sentinel/ (FTC Consumer Sentinel Network)
8	Internet and telemarketing fraud statistics	www.fraud.org
8	Advertising Spending	www.adage.com
8	Internet Use Stats	www.pewinternet.org/trends
10	EFM Fact Sheet	www.npc.navy.mil/CommandSupport/ExceptionalFamilyMember/
10	TRICARE Fact Sheet	www.tricare.mil
10	NMCRS Info	Contact NMCRS HQ staff at www.nmcrs.org
3 and 12	Bankruptcy Stats	www.abiworld.org
3 and 12	National Consumer Credit Stats; Survey of Consumer Finances	www.federalreserve.gov/releases/g19/Current/
16	SGLI/FSGLI/TSGLI Rates	www.insurance.va.gov
16	Survivor Benefit Updates	www.va.gov ; www.defenselink.mil/militarypay ; www.gibill.va.gov
19	Inflation Rate	www.bls.gov/cpi

19	ROR Stocks, Bonds	Most financial websites, Ibbotson Chart for Stocks, Bonds, Bills and Inflation, www.savingsbonds.gov for U.S. Gov't Savings Bonds
19	ROR MMA, Savings accounts	www.bankrate.com
20	Comparison of TSP Fund Returns	www.tsp.gov
20	Annual CNA Redux Report	www.cna.org/nationalsecurity/rad/retirementcalc.aspx
20	Retirement estimates	https://staynavytools.bol.navy.mil/RetCalc/Default.aspx

ONE DAY BEFORE COURSE: (Date: _____)

___ Room setup (tables, chairs, trash cans, coffee mess, etc.)

___ Stock classroom with other training supplies

___ Markers (multicolored)

___ Pens and pencils

___ Stapler and staple remover

___ Three-hole punch

___ Extra calculators

___ Pencil sharpener

___ Masking tape

___ Sticky notes

Be prepared to provide information to class on the following:

___ Coffee mess

___ Materials in room overnight

___ Smoking areas

___ Parking

___ Restrooms

___ Noise in the halls

___ Other information about facilities participants should know

___ Put all student materials (manuals/handouts) in training room

___ Ensure all training materials are in classroom

___ CFS Instructor Guide

___ CFS CD-ROM (with CFS Toolkit File, Resource File, and any other local information desired)

___ PFMSC CD-ROM

___ Role Play Counselee Packages (one package for each group)

- The Money Tree Video (optional)
- Additional resources and research as needed
- Other materials per individual IG direction

WEEK OF COURSE

- Gather student data cards
- Generate class roster for distribution to class on Friday
- Score pre-test
- Generate certificates of completion
- Get certificates of completion signed
- Review daily (if used) and course evaluations for training effectiveness and course improvement

FINAL DAY OF COURSE

- Gather course evaluations
- If Level Three Evaluation will be conducted on this class, inform participants
- Clean classroom
- Put all materials away for next training course

WEEK AFTER COURSE

- Thank-you notes to guest speakers
- Enter information into CETARS/NITRAS system as required
- Score post-test, compile data and Level Two Evaluation report
- Review all course evaluations. Compile data and incorporate recommended changes into next course as appropriate
- If Level Three Evaluation will be done on this class, retain Level One and Level Two Evaluations

THREE TO SIX MONTHS AFTER COURSE

- Conduct Level Three Evaluation