

AGENDA

FINANCIAL LITERACY AND INCLUSION SUPERVISION
AUGUST 12 – 16, 2019
LUSAKA, ZAMBIA



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MONDAY, AUGUST 12

- 08:30–09:15 Welcome and Opening Remarks
Group Photography Session
- 09:15–09:45 **Session 1: Participant’s Sharing of Experiences and Expectations**
Shelina Visram, Program Director, Toronto Centre
- 09:45–10:00 **BREAK**
- 10:00–11:30 **Session 2: National Financial Inclusion Strategies**
Michael Hafeman, Program Leader, Toronto Centre
- Elements of National Financial Inclusion Strategies
 - Overview of Zambia’s NFIS
- 11:30–12:30 **Session 3: Reports from BOZ, PIA and SEC regarding the NFIS**
Representatives from BOZ, PIA and SEC
- Work to date on implementation
 - Barriers to and enablers of progress
 - Plans for coming year or two
- 12:30–13:30 **LUNCH**
- 13:30–14:45 **Session 4: Action Planning Training and Workshop – Defining the Problem**
Shelina Visram, Program Director, Toronto Centre
- Participants will start applying the action planning methodology with the assistance of program leaders. Focus is on understanding the situation and the development of a precise definition of the problem/challenge identified.
 - Participants work in groups, identifying challenges and gaps related to implementation of the NFIS.
- 14:45–15:00 **BREAK**
- 15:00–16:30 **Session 4: Action Planning Training and Workshop – Defining the Problem (Continued)**

TUESDAY, AUGUST 13

- 08:30–08:45 **Ideas I will use**
- 08:45–10:00 **Session 5: Increasing the supply of financial products and services**
Michael Hafeman, Program Leader, Toronto Centre
A session highlighting key aspects of this topic, such as:
- Barriers to involvement of the financial sector in increasing supply
 - Delivery channels, including digital financial inclusion
 - Regulatory sandboxes
- 10:00–10:15 **BREAK**
- 10:15–12:00 **Session 5: Increasing the supply of financial products and services (Continued)**
Michael Hafeman, Program Leader, Toronto Centre
Workshop to discuss the related elements of the NFIS, specifically:
- Widespread and Accessible Delivery Channels
 - Diverse, Innovative, and Customer-Centric Products
 - Finance for SME and Agricultural Sector Growth
- 12:00–13:00 **LUNCH**
- 13:00–14:45 **Session 6: Stakeholder Communication and Persuasion**
Shelina Visram, Program Director, Toronto Centre
A session on how to convince key stakeholders to support work proposals:
- Analyze stakeholders – who they are, what they like and dislike and what is needed to get their support.
 - Introduce the “Four box model” for effective persuasion and communication.
 - Building a “burning platform” and using the “Four box model” for effective persuasion of key stakeholders.
- 14:45–15:00 **BREAK**
- 15:00–15:30 **Session 6: Stakeholder Communication and Persuasion (Continued)**
Activity related to financial inclusion including role play tied to NFIS coordination structure.
- 15:30–16:30 **Session 7: Action Planning Workshop – develop SMART goals**
Participants work in groups, defining the goals.

WEDNESDAY, AUGUST 14

- 08:30–08:45 **Ideas I will use**
- 08:45–10:00 **Session 8: Increasing the demand for financial products and services**
Anatol Monid, Program Leader, Toronto Centre
A session highlighting key aspects of this topic, such as:
- Financial capability and its relationship to policy objectives
 - Barriers to development of financial capability, including gender
 - Approaches to financial education
- 10:00–10:15 **BREAK**
- 10:15–12:00 **Session 8: Increasing the demand for financial products and services (Continued)**
Anatol Monid, Program Leader, Toronto Centre
Workshop to discuss the related elements of the NFIS, specifically:
- Financial capability
 - Financial consumer protection
- 12:00–13:00 **LUNCH**
- 13:00–14:45 **Session 8: Increasing the demand for financial products and services (Continued)**
- 14:45–15:00 **BREAK**
- 15:00–16:30 **Session 9: Action Planning Workshop – outline the plan and analyze key stakeholders**
Participants work in groups, outlining the sequence of action steps and resources and defining the stakeholder communication strategy.

THURSDAY, AUGUST 15

08:30–08:45 **Ideas I will use**

08:45–10:00 **Session 10: Measurement**

Anatol Monid, Program Leader, Toronto Centre

A session dealing with aspects of this topic, such as:

- Measuring financial inclusion
- Measuring financial capability
- Measuring the effectiveness of programs

10:00–10:15 **BREAK**

10:15–12:00 **Session 10: Measurement (Continued)**

Anatol Monid, Program Leader, Toronto Centre

Workshop to discuss the related elements of the NFIS, specifically:

- NFIS results framework
- Financial inclusion data structure
- Evaluation of key actions

12:00–13:00 **LUNCH**

13:00–14:45 **Session 10: Measurement (Continued)**

14:45–15:00 **BREAK**

15:00–16:30 **Session 11: Action Planning Workshop – finalize the plan**

Participants work in groups, finalizing their presentations. Participants will receive guidance from experts.

FRIDAY, AUGUST 16

- 08:30–08:45 **Ideas I will use**
- 08:45–10:00 **Session 12: Action Plan Presentation by Participants**
Participants will present their Action Plans and receive feedback from program leaders.
- 10:00–10:15 **BREAK**
- 10:15–11:00 **Session 12: Action Plan Presentation by Participants (Continued)**
- 11:00–12:00 **Session 13: Implementation of Action Plans Training and Workshop**
Michael Hafeman, Program Leader, Toronto Centre
- Mechanisms within each agency
 - Coordination among the agencies
 - Post-program follow-up on action plans
- 12:00–13:00 **LUNCH**
- 13:00–14:15 **Session 13: Implementation of Action Plans Training and Workshop (Continued)**
- 14:15–14:45 **Evaluation and Closing**