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| **ANNEXURE A****FEEDBACK TEMPLATE**DISCUSSION DOCUMENT- ENSURING APPROPRIATE FINANCIAL EDUCATION INITIATIVES |
| **DATE**  | Complete  |
| **NAME OF ORGANISATION**  | Complete  |
| **TYPE OF ORGANISATION**  | Complete  |
| **CONTACT DETAILS**  | Complete  |
| ***Question for stakeholder input:****Q1* *Are there other types of channels for FE programmes or activities to be included in the scope above?*  |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q2* *Are there any other factors to be considered when identifying target groups?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q3 Are there current Physical Access/logistical guidelines in place in your area of the financial sector or financial institution that could be leveraged for these requirements or of which the FSCA should be aware?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q4. Would the requirements as proposed be practical and implementable?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q5* *In your experience are there any other factors to be considered when hosting a FE initiative regarding physical accessibility/logistics?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q6. Do you perceive M&E as an essential element of programme implementation?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q7. Do your programmes incorporate quantitative/qualitative methodologies?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q8. Do your programmes incorporate pre and post surveys to measure behaviour change?*  |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q9. If your programmes do contain M&E methodologies, do you use an internal and/or external resource for this function.* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q10. If you do make use of M&E methodologies do you share your analysis and outcomes with other stakeholders?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q11. Are there existing M&E tools being used by stakeholders that can be provided to the FSCA as examples of best practise?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q12. Are there existing success indicators being used by stakeholders that can be provided to the FSCA as examples of best practise?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q13. Are the formulas provided for calculating branding on consumer education material appropriate?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q14. Do stakeholders have other formulas or criteria that can be provided to the FSCA as examples of best practise?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q15.* *Will the proposals impose additional compliance costs on financial institutions funds? If yes, please provide details including the expected costs?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q16.* *How do you anticipate the proposals affecting the operational cost financial institutions, if at all?* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q17.* *Do you anticipate that business models may need to change as a result of the proposals? If yes, please provide details.* |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q18.* *How are different customer groups likely to be impacted by the proposals?*  |
| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q19.* *Do you expect the proposals to lead to:** *better quality FCE initiatives?*
* *an increase or decrease in the number of FE initiatives provided by financial institutions? In addition, is there a risk that the proposal will disincentivse financial institutions to provide FE initiatives and, if so, would it be a material or immaterial disincentive?*
* *more or better informed financal customers?*
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| **Issue/ Comment/ Recommendation** |
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| ***Question for stakeholder input:****Q20.* *Please provide any further general comments you may have on the Discussion Document.* |
| **Issue/ Comment/ Recommendation** |
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