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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?* | |
| **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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