



O1 – FINKIT EVALUATION MAP  
GUIDE – PROJECT REPORTS: ITALY

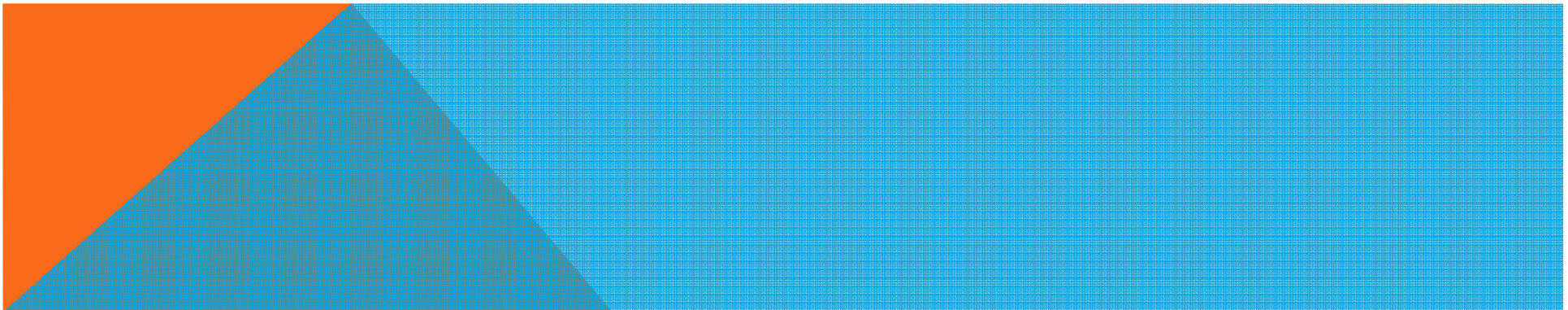
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# OBJECTIVES AND METHODOLOGIES

**Objectives:** analysis of Italian financial literacy projects (FLP) already developed, considering the assessment key concepts: relevance, effectiveness, efficiency, sustainability.

## Survey design and implementation:

- Web search on FLPs implemented by public and private institutions (including voluntary and consumers associations)
- Selection of FLP relevant FinKit (10): target population, public/ private funded, geographical area (EU/national/local).
- Sending of Questionnaires (Annex 2) to selected FLPs: response rate 50%
- Filling of Annex 1 using the information provided by respondents.



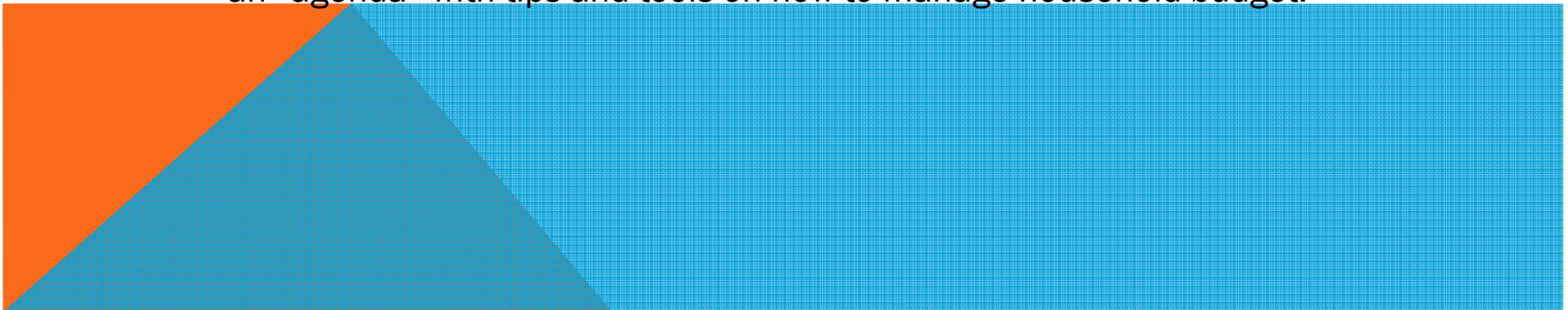
# 1. ABACO PROJECT

**General aims:** to implement the NIBUD strategy to face the lack of financial education among vulnerable adults (old people) and migrants in Southern Europe.

**Institution responsible** - Geographical area - *Sponsor*: Consortium multi-player (foundations and no profit organizations from Italy, Greece, Spain, Portugal, the Netherlands and Sweden) - International level (EU) - *European Union*.

## **Results or products:**

- Financial literacy reports
- Courses and seminars on FL
- Two basic books on budgeting, guides to support teachers in FL trainings, an “agenda” with tips and tools on how to manage household budget.



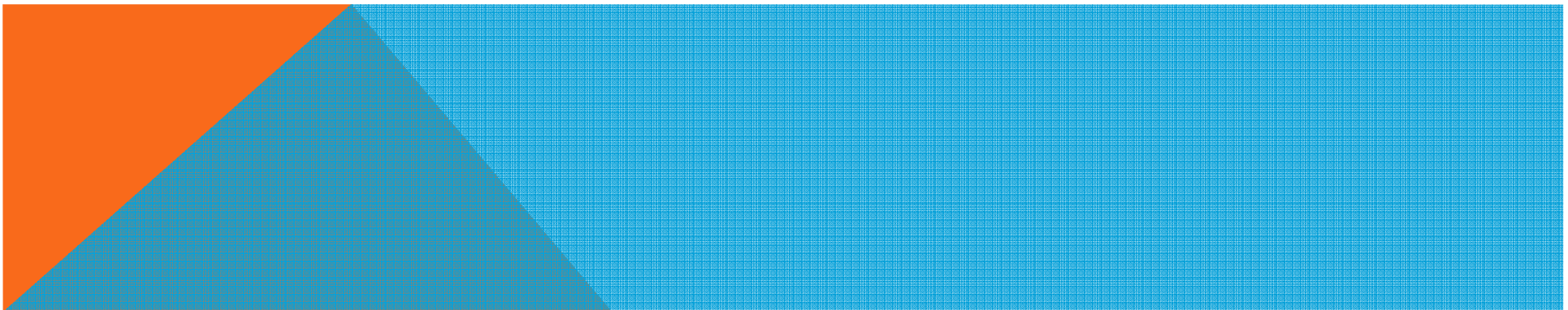
## 2. WELFARE FINANZIARIO COMUNITARIO

**General aims:** to realize effective financial education programs for citizens (both the overall population and the most vulnerable groups); the project provides individual advisory activities fulfilled by financial educators.

**Institution responsible - Geographical area - *Sponsor of the project:*  
Municipality of Milan - Local level - *Comune di Milano, Università Cattolica, UNI, PROGeTICA.***

### **Results or products:**

- Training programs implemented through two sequential programs: “IO WELFARE” (collective seminars on financial planning) and “TU WELFARE” (individual meetings with financial educators, targeted on specific financial needs).



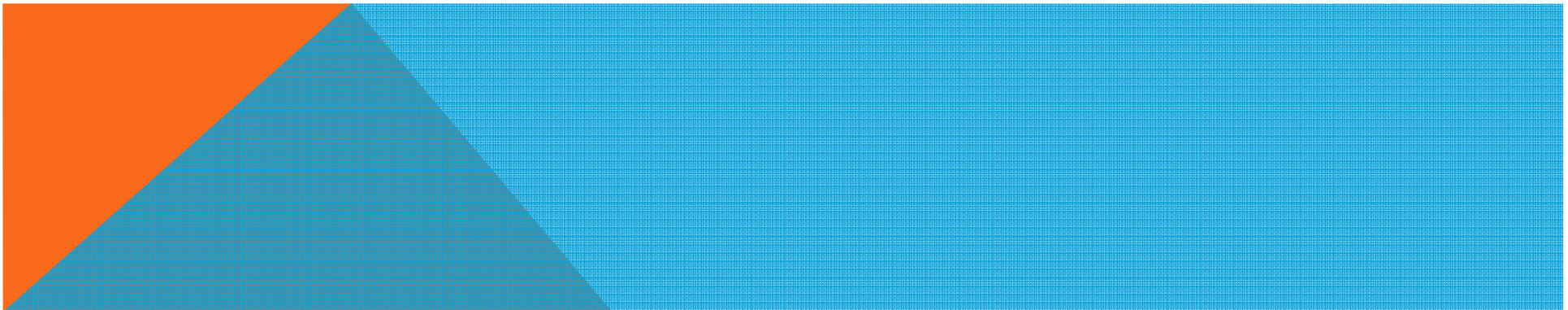
### 3. RENDIMENTO E RISCHIO

**General aims:** to teach basic economic and financial concepts to small money savers. It is a private initiative of a broker that found a public and private support and sponsorship.

**Institution responsible - Geographical area - *Sponsor of the project:*  
Municipality of Piano di Sorrento (Naples)- Local level - *Anima SGR, Banca Monte dei Paschi di Siena.***

#### **Results or products:**

- Five seminars with a financial consultant focusing on different topics (bonds, mutual funds, pension reform, familiar financial planning, Italian contemporary economic situation)
- Slides, videos and brochures available online.



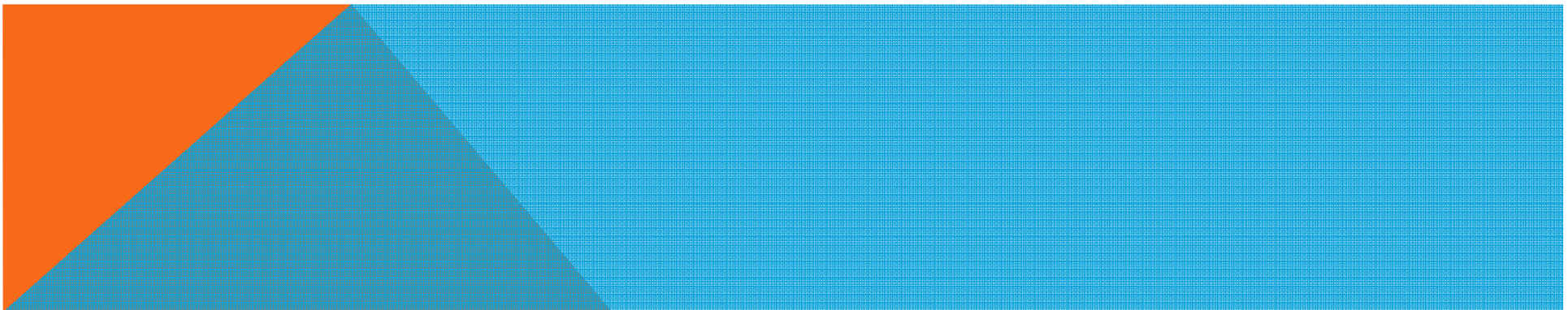
## 4. BANCA DELLA MAREMMA

**General aims:** to provide financial education courses in institutions like schools, associations, etc. It is a bank initiative addressed to students and small money savers.

**Institution responsible – Geographical area - *Sponsor of the project*:** Banca della Maremma – Local level.

### **Results or products:**

- Seminars for schools, associations, and general audience (privileged targets: students, older people and the poor fraction of the population).
- Slides and notes available in the bank website.



## 5. FONDAZIONE PER L'EDUCAZIONE FINANZIARIA E AL RISPARMIO (FEDUF)

**General aims:** (many projects and activities) to promote financial literacy among teachers and students.

**Institution responsible** - Geographical area - *Sponsor of the project*: FEDUF (a non-profit private institution that aims at pursuing the social utility by promoting the financial education and the culture of savings) - National level - *Ordinary and supporter participants (Italian banks)*

### **Results or products:**

- Seminars for teachers and school directors about financial education (“EconomiAscuola” project)
- Books, didactic programs, multimedia platforms and theatre shows, all targeted on primary and secondary school students.

