

Financial Security & Economic Wellbeing Concentration Area Follow-up Evaluation Tool

The statements below can be used in a survey to evaluate medium-term (MT) outcomes (at least four weeks after a program takes place). *Extension agents should contact specialists in this concentration area for guidance on how to evaluate learning opportunities in this area.*

[XYZ-Name of Program] Follow-Up Survey

Please circle the option that best describes your response to each statement.

Indicator # in KERS	Statements/Questions	Response Categories	
201.12	After participating in [XYZ-Name of Program], I made a sound financial decision (e.g., regarding credit, budgeting, savings, debt, estate planning, fraud reduction, etc.).	Yes	No
201.13	After participating in [XYZ-Name of Program], I implemented a strategy to better manage my family finances and resources (e.g., considered wants/needs, avoided bank fees, reviewed tax forms, set savings goals, started estate plan, developed budget, increased fraud protection, etc.).	Yes	No
201.14	How much money have you saved since participating in [XYZ-Name of Program]? ¹	\$ _____	

¹ Please note that this indicator assesses the amount of money saved, hence, the question is asking participants to indicate an amount in dollars. An agent implementing any of the learning opportunities that targets this indicator will add (sum) the amount of money reported by all participants in their program and report the total in KERS.