Evaluating Indicators in the <u>Financial Security and Economic Wellbeing</u> (Adult) Concentration Area

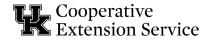
This document contains survey statements for evaluating the indicators in the Financial Security and Economic Wellbeing (Adult) concentration area. *Extension agents should contact specialists in this concentration area for guidance on how to evaluate learning opportunities in this area.*

The indicators for this concentration area consist of short-term and medium-term outcomes as indicated in Table 1.

- Short-Term Program Metrics (PM): Indicators designated as short-term program metrics (PM)
 <u>do not</u> require a survey and are typically measured using program data and other program
 evaluation/process monitoring information (e.g. attendance/sign in sheets, participant records,
 participatory evaluation).
- **Short-Term Outcomes (ST):** Indicators designated as short-term (ST) represent expected **immediate** outcomes of UK Extension Financial Security and Economic Wellbeing (Adult) programs. These indicators are measured using post-participation evaluation tools/surveys.
- **Medium-Term Outcomes (MT):** Indicators designated as medium-term (MT) represent expected **behavior change** outcomes of UK Extension Financial Security and Economic Wellbeing (Adult) programs. Behavior change typically requires time to mature. Hence, these indicators are measured using follow-up evaluation tools/surveys.

Table 1: Indicators and Survey Statements

Concentration Area: Financial Security and Economic Wellbeing (Adult)				
KERS Indicator #	Indicator	Statements (Y/N)	Timeline for Evaluation	
201.9	finance and/or resource management concepts.	Program] increased my knowledge of family finance and/or resource management concepts.	ST	
		Participating in [XYZ-Name of Program] increased my skills related to family finance and/or resource management.	ST	
201.11	Number of individuals who reported improved confidence to implement family finance and/or resource management skills.	Participating in [XYZ-Name of Program] improved my confidence to implement family finance and/or resource management skills.	ST	
201.12		After participating in [<i>XYZ-Nam</i> e of <i>Program</i>], I made a sound financial	MT	



	regarding credit, budgeting,	decision (e.g., regarding credit,	
	savings, debt, estate planning,	budgeting, savings, debt, estate	
	fraud reduction, etc.).	planning, fraud reduction, etc.).	
201.13	Number of individuals who	After participating in [XYZ-Name of	
	implemented at least one strategy	Program], I implemented a strategy to	
	to better manage their family	better manage my family finances	
	finances and resources (e.g.,	and resources (e.g., considered	
	considered wants/needs, avoided	wants/needs, avoided bank fees,	MT
	bank fees, reviewed tax forms, set	reviewed tax forms, set savings goals,	
	savings goals, started estate plan,	started estate plan, developed	
	developed budget, increased fraud	budget, increased fraud protection,	
	protection, etc.).	etc.).	
201.14	Dollars reported saved as a result	How much money have you saved since participating in [XYZ-Name of Program]? \$1	MT
	of participating in a financial		
	education or family resource		
	management program.		
201.15	Number of small businesses who	Participating in [XYZ-Name of Program] increased my skills related to business marketing, expansion, or retention.	ST
	report developing skills related to		
	business marketing, expansion, or		
	retention through participating in		
	Extension programming.		
201.16	Number of small businesses who	Participating in [XYZ-Name of	
	report increased knowledge of	Program] increased my knowledge of	
	business financial management	business financial management	ST
	concepts (e.g. budgeting, pricing,	concepts (e.g. budgeting, pricing,	
	taxes, financial planning).	taxes, financial planning).	
201.17	Number of grants or tangible		
	financial resources accessed by	This is a program metric. Please	PM
	communities, nonprofits, or small	report from program data e.g.,	
	businesses as a result of Extension-	attendance lists.	
	supported initiatives.		

