

EVALUATING THE IMPACT OF EEP

Why evaluate?

Evaluating our work provides us with important information about how we improve and/or expand on what we're doing well. It's useful to conduct regular evaluations of your economic empowerment sessions, as well as general program evaluations.

Evaluation also captures data about your participants that is useful in targeting outreach and/or fundraising efforts. Collecting data about participants' ethnic and economic backgrounds can be very useful in reports and grant proposals, as well as in shaping the content of your workshops to meet the needs of different groups.

How?

You can evaluate the impact of your sessions by informally requesting feedback from participants, and by asking them to complete questionnaires. It's important that you request information that reflects the goals of the program, and that the questions you ask align with the indicators of success you identified before you started delivering the workshops.

Too often, program staff spends hours identifying indicators of success (for example, increased savings, better understanding of credit repair), and then limits questionnaire content to questions about the snacks provided or the facilitator's skill. While it's useful to get feedback about the logistical aspects of the workshop, it's more substantial from an evaluation standpoint to assess whether the program has impacted participants' lives. Even if participants indicate that the workshop was "fun" or "interesting," it's would be more useful to know how or if the workshop had an impact on their thinking, their behavior, or their lives. The best way to determine this is to ask for your participants' feedback with a good assessment tool.

Assessment tools

The Community Scaling Tool is designed to allow local agencies to show the incremental progress that is made towards the achievement of long-term, complex goals. The task force that developed it created sets of indicators that can help program staff assess progress along different continuums—health, housing, employment, etc. WIHED has adapted their indicators of financial security as a framework for evaluating the impact of our economic development programs. Since participants come into the program at different levels, it makes sense to assess their individual progress. Even if we can't move all our participants into financial security, we can help them progress towards that goal—we consider movement from one level to the next a measure of success such as, someone moves from the level of "in crisis" to the level of "at risk." The scales and ladders matrices allow agencies to measure progress at every level.

Scales and ladders, most often, are used by family advocates or case managers to evaluate the progress of families over a period of time. A family advocate works closely with her clients, and can easily assess progress across the spectrum. Since workshop facilitators do not have the same level of information about their program participants, and because participation in a workshop alone cannot yield the same results as long-term, comprehensive family service work, we've



developed a more general questionnaire based on some of the indicators in the matrix. In other words, we don't expect that merely participating in the workshop series alone will move a family from one level to another, but we use the indicators outlined by the matrix to define the learning we hope will happen in the workshops. If you provide the workshops in addition to other services, it might make be beneficial to adapt the matrix itself for the evaluation of your program as a whole.

Analysis

It may be very useful to administer pre and post-tests to gather information that you regularly enter and analyze in a computer system. Part of the workshop planning and preparation process should include copying, entering, compiling, analyzing, and interpreting evaluation data. When you develop your questionnaire, think ahead to how you will analyze the data it will yield. The sample questionnaires in this manual are based on a pre and post-test model. The questionnaires are confidential, therefore reports can only be made in the aggregate, and there is no way to track individual progress or compare progress of sub groups. There are lots of ways of generating information—using post-test only, using scales to measure progress along a continuum, asking qualitative questions to measure learning. You may develop the best practices that fit your program.

Additional resources

- General resource list for nonprofit evaluations, from The Management Assistance Program for Nonprofits: <http://www.mapnp.org/library/evaluatn/evaluatn.htm>
- Download a copy of W.K. Kellogg Foundation Logic Model Development Guide at <http://www.wkkf.org/pubs/Pub3669.pdf>
- The National Community Services Block Grant Monitoring and Assessment Task Force's matrices and indicators: <http://iccs.csumb.edu/html/community/matrix/index.html>

Matrix for Housing, Employment, and Finances

	Housing	Employment	Finances
5: Thriving	Housing of choice without subsidy	Permanent, stable, sustaining employment	<ul style="list-style-type: none"> • Sufficient earned income to allow family choices for non-essential purchases; • Able to save 10% of income; • Established relationship with financial institution; • Expect continued income at current level or better for at least next year.
4: Capable	Affordable, satisfactory, without subsidy	Full-time, adequate pay, limited benefits	<ul style="list-style-type: none"> • Sufficient earned income to meet basic family needs; • Plan and stick to monthly budget; save when possible; • Able to obtain secured credit; • Pay bills on time; delay purchases to handle debt load; • Anticipate continuation of income level for next 6 months.
3: Protected	Affordable with subsidy	Under-employed, inadequate pay and benefits	<ul style="list-style-type: none"> • Minimally adequate income without regard to source; • Plan monthly budget; no savings; • Able to obtain limited secured credit; • Generally pay bills on time; • Aware of and use appropriate resources for help; • No foreseen major decrease in family income.
2: At Risk	Transitional/temporary	Temporary or part time employment	<ul style="list-style-type: none"> • Occasionally unable to meet basic needs; • Spontaneous, inappropriate spending; no savings; • Unable to obtain credit; • Limited knowledge of and access to resources for help; • Unpaid bills, overwhelming debt load.
1: In Crisis	Homeless, threatens health or safety	Unemployed with no prospects or skills	<ul style="list-style-type: none"> • No money; cannot meet basic needs; • No knowledge of available resources for help

INDICATORS OF ECONOMIC SECURITY:

- Income level in context of cost of living
- Long and short-term financial goals
- Budgeting skills
- Financial discipline
- Presence or absence of career goals
- Knowledge of and access to resources that support employment
- Relationship with banking institution

SAMPLE ECONOMIC EMPOWERMENT PRE-CLASS QUESTIONNAIRE

1. Please check the appropriate box for the following statements:

I have the information I need to choose a bank that's right for me.	YES	NO	N/A
I have a bank account or plan to open one.	YES	NO	N/A
I cash my checks in a way that costs me little or nothing.	YES	NO	N/A
I know about the different methods of filing taxes.	YES	NO	N/A
I don't understand where my tax money goes.	YES	NO	N/A
I know about the earned income credit and how to claim it.	YES	NO	N/A
I have a personal economic plan that is written down.	YES	NO	N/A
I know how to work towards my long-term savings goal.	YES	NO	N/A
I know how to work towards my short-term savings goal.	YES	NO	N/A
I feel like I spend my money without knowing where it goes.	YES	NO	N/A
I know my spending tendencies and how to handle them.	YES	NO	N/A
I have requested a copy of my credit report.	YES	NO	N/A
I know how to identify a "credit trap."	YES	NO	N/A
I have a written personal budget.	YES	NO	N/A
I stick to a written personal budget.	YES	NO	N/A
I have identified my career goals.	YES	NO	N/A
I have a plan to reach my career goals.	YES	NO	N/A
I can access resources to help me reach my career/financial goals.	YES	NO	N/A

2. What topics or questions do you want the facilitator of this course to address?

3. Background Information

Birth Date:	Ethnic/Cultural Identity:
Number of dependents:	Average Annual Family Income: \$

4. If you currently receive benefits, please check which type(s) of support you are receiving. **(If you don't receive benefits, skip to question 4)**

TANF
 SSI
 Food Stamps
 Section 8
 Child Care
 Other:

5. Are you in danger of losing your benefits? Yes No Why?

6. Are you currently employed? Yes No (If no, skip to question 7). If Yes, Full-time Part-time

Do you have benefits? Yes No

If Yes, which? (Check all that apply)

Health/Dental
 Savings
 Retirement
 Disability Ins.
 Life Ins.
 Other _____

7. What is the highest level of education you have completed? **(Check one answer only)**

College degree
 2-year Degree
 Some college
 Vocational certificate
 Job training
 H.S. Diploma
 GED certificate
 Other



SAMPLE ECONOMIC EMPOWERMENT POST-CLASS QUESTIONNAIRE

1. Please check the appropriate box for the following statements:

I have the information I need to choose a bank that's right for me.	YES	NO	N/A
I have a bank account or plan to open one.	YES	NO	N/A
I cash my checks in a way that costs me little or nothing.	YES	NO	N/A
I know about the different methods of filing taxes.	YES	NO	N/A
I don't understand where my tax money goes.	YES	NO	N/A
I know about the earned income credit and how to claim it.	YES	NO	N/A
I have a personal economic plan that is written down.	YES	NO	N/A
I know how to work towards my long-term savings goal.	YES	NO	N/A
I know how to work towards my short-term savings goal.	YES	NO	N/A
I feel like I spend my money without knowing where it goes.	YES	NO	N/A
I know my spending tendencies and how to handle them.	YES	NO	N/A
I have requested a copy of my credit report.	YES	NO	N/A
I know how to identify a "credit trap."	YES	NO	N/A
I have a written personal budget.	YES	NO	N/A
I stick to a written personal budget.	YES	NO	N/A
I have identified my career goals.	YES	NO	N/A
I have a plan to reach my career goals.	YES	NO	N/A
I can access resources to help me reach my career/financial goals.	YES	NO	N/A

2. Please rate your agreement with the following statements: 1: strongly disagree 5: strongly agree

As a result of this course ...

I've developed the skills I need to take control of my finances.	1	2	3	4	5	N/A
I have a better understanding of how I fit into the "big economic picture."	1	2	3	4	5	N/A
I have the knowledge I need to take control of my finances.	1	2	3	4	5	N/A
I know where to turn for help with my financial situation.	1	2	3	4	5	N/A
I feel like I can make more informed choices about my finances.	1	2	3	4	5	N/A

3. What was the most useful part of the course?

4. What could we do to improve the course?

THANK YOU FOR YOUR VALUABLE INPUT!





ECONOMIC EMPOWERMENT PROGRAM EVALUATION

1. How much do you agree with the following statements?
Please rate on a scale of 1 Strongly disagree - to - 5 Strongly agree

As a result of this course ...

I've developed the skills I need to take control of my finances.	1	2	3	4	5	N/A
I have a better understanding of how I fit into the "big economic picture."	1	2	3	4	5	N/A
I have increased my understanding of where my tax money goes.	1	2	3	4	5	N/A
I have the knowledge I need to take control of my finances.	1	2	3	4	5	N/A
I know where to turn for help with my financial situation.	1	2	3	4	5	N/A
I feel like I can make more informed choices about my finances.	1	2	3	4	5	N/A
I will take action to improve my financial situation.	1	2	3	4	5	N/A
I plan to start saving.	1	2	3	4	5	N/A
I understand how to manage and repair my credit.	1	2	3	4	5	N/A

2. What was the most useful part of the course?

3. What could we do to improve the course?

4. Additional feedback?

THANK YOU FOR YOUR VALUABLE INPUT!

