

Demographics and Pre-assessment

Purpose:

- Section 1 Demographics collects demographic information about your participants.
- Section 2 Thinking about money gathers information about your participants' money-related attitudes and practices before you deliver the course.
- Section 3 Your money gathers details about participants' financial situation to help support documentation of longer-term changes in their financial situation.

When should you use this tool?

- When you need to know more about the people you serve, to support accountability to stakeholders – are you serving the population that you targeted? (*Section 1 Demographics*)
- When you are interested in doing some simple outcomes research. (*Section 2 Thinking about money...*)
- When you are interested in longer-term research into outcomes. (*Section 3 Your money*)
- This form is administered by staff who deliver financial literacy education and it is filled out by participants at the beginning a course.

Description:

- It creates a picture of the gender, age, language, culture, education and dependents of your participants. (*Section 1 Demographics*)
- It captures baseline information about participants' money management attitudes and practices against which you can measure change (*Section 2 Thinking about money...*) This section can be compared to data collected from the participant post- form and the 3-6 month Participant Follow-on Survey, in order to help document change.
- It captures baseline information about financial services, savings goals, personal income levels, making ends meet, debts, etc. (*Section 3 Your money*). This section can be compared with data gathered from the 3-6 month Participant Follow-on Survey.

How to use it:

- Customize the tool by picking questions that capture outcomes that align with your financial literacy program.
- Do not collect information that you do not plan to use in some way.
- The tool is best used at the beginning of a course as a 'pre-test' to collect baseline data, and again as a 'post-test' after the course is completed.