

Follow-up Survey (3-6 Months)

Purpose:

- Section 1 Thinking about money develops a picture of your participants' money-related attitudes and practices several months after you have completed a course with them.
- Section 2 Your money is designed to support a more in-depth exploration of changes in participants' financial situation over time.

When should you use this tool?

- When you are interested in
 - doing simple outcomes research (Section 1 Thinking about money)
 - more in-depth outcomes research (Section 2 Your money)
- Use this tool only if you have already implemented the matching pre-test at the beginning of the course.
- This form is administered by staff (facilitators, coordinators, managers or evaluators) and it is filled out by participants (or staff, if conducted over the phone) several months after a course.
- There is no set timeline for implementing this tool, but we recommend that you use it 3-12 months after the end of a course.

Description:

- By asking the same questions that appear on the pre- and post- form, you can compare answers to help identify changes in participants' money-related attitudes and practices, and their financial situation.
- **Note:** Section 2 Your money is not included in the post- form as it is likely too early to expect changes in people's financial situation so soon after the initial intervention.

How to use it:

- You can customize the tool for your program by picking questions that capture outcomes that align with the financial literacy activities that you do.
- The survey can be done online or over the phone, or you can pay participants to come and fill it out.
- Depending on your assessment of the literacy/language level of participants you can either hand out the form for people to fill in by themselves or you can read it out loud and have participants answer each question as you move through the form.
- You may have to work one-on-one with some participants to help them understand certain questions. The idea is to help them answer all questions to the best of their ability without interfering in the answers.
- Think about holding a draw as an incentive for people to participate. If you can't pay people to complete the forms, an I-Pod or similar prize is a great enticement.