

**Evaluation Designs**

**Hypothetical AmeriCorps program:**

- A 10 site financial education program that engages members in delivering a financial education curriculum to eligible clients.
- Members placed in credit unions and local financial institutions to provide financial counseling clients, assist with financial seminars and informational fairs, and recruit experienced financial professionals to serve as volunteers in a credit counseling program.
- Major funders are AmeriCorps and a small foundation, and it partners with local banks and a local social services agency.
- Receives over \$500,000 in AmeriCorps grant funds per year.

**Process evaluation research questions:** What kinds of clients are seeking financial education services? How are clients accessing the program?

<b>Evaluation Design Crosswalk: Process Evaluation</b>				
Research question	Evaluation design	Methods	Data to be collected, when, and by whom	Analysis plan
What kinds of clients are seeking financial education services?	Process evaluation	<ul style="list-style-type: none"> <li>• Client interviews (25)</li> <li>• Document review: client intake forms, member activity logs</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluator will conduct interviews when clients begin program</li> <li>• Documents reviewed quarterly</li> </ul>	<ul style="list-style-type: none"> <li>• Thematic analysis on interview transcripts using NVivo</li> <li>• Coding and thematic analysis</li> </ul>
How are clients accessing the program?		<ul style="list-style-type: none"> <li>• Client interviews (same as above)</li> <li>• Partner focus groups (4)</li> </ul>	<ul style="list-style-type: none"> <li>• (Same interview as above)</li> <li>• Evaluator will hold focus groups quarterly</li> </ul>	<ul style="list-style-type: none"> <li>• (Same as above)</li> <li>• Thematic analysis on transcripts using NVivo</li> </ul>

**Outcome evaluation research questions:** Do clients exit the program with increased knowledge of personal finance concepts relevant to their needs?

<b>Evaluation Design Crosswalk: Outcome Evaluation</b>				
Research question	Evaluation design	Methods	Data to be collected, when, and by whom	Analysis plan
Do clients exit the program with increased knowledge of personal finance concepts relevant to their needs?	Outcome evaluation	Randomized control trial- clients will be randomly assigned to treatment at time of application to program. Control group individuals deferred for 6 months, then eligible to participate in program	<ul style="list-style-type: none"> <li>• Client and control group knowledge of personal finance concepts</li> <li>• Pre-test: during application; post-test: for treatment group, upon completion of program. For control group, at 6 months post-deferment</li> <li>• Collected by evaluator via paper and pencil and online survey</li> </ul>	<ul style="list-style-type: none"> <li>• Statistical analysis- descriptive statistics; between groups T-test using STATA software</li> </ul>