

Panel 6 –Evaluating Investor Education Programmes

Brent A. Neiser, CFP®

Director, Strategic Programs and Alliances, National Endowment for Financial Education

ban@nefe.org – 303-224-3501 – www.nefe.org

1. Who is NEFE
 - a. NEFE’s work across different action areas
2. United Way flow chart
 - a. Think Outcomes, Not Outputs
3. NEFE’s High School Financial Planning Program
 - a. Description
 - b. How many schools/students are participating
 - c. Difficulties in Teacher Training
 - d. Evaluation Component
 - i. Research by University of Minnesota
 - ii. Focus on Specific Behaviors
4. NEFE Evaluation Toolkit
 - a. Description—what it is, what it does
 - b. Background Information
 - c. Where to find it
5. Research & Development: Building Evaluation in Program Design
 - a. Volunteer Income Tax Assistance sites
 - i. Tax preparation
 - b. United Way
 - i. 2-1-1 call centers (a telephone-based informational community referral service)
 - c. Port Jobs
 - i. Apprentice and construction workers
 - ii. Tracking a mobile population
6. FDIC: Outcomes and Evaluation in Financial Education
 - a. Findings from Evaluation Research
 - b. Positive behavior change
7. Lessons Learned
 - a. Need for focus groups of target audience
 - b. Value of pilot versions of large-scale projects
 - c. Develop logic models
8. Things to think about when planning evaluation
 - a. Effectiveness of evaluation versus effectiveness of program
 - b. Continual improvement
 - c. Impact
 - d. Demand/use
 - e. Incentives for reporting/follow-up
 - f. Analysis
 - g. Strengthen relationships and your reputation with media, funders, and regulatory authorities
 - h. Open feedback: let participants, clients, and donors learn from each other’s comments