FSLL Indicators For Measuring Program Impact

**Number of participants who:**

1. attend and complete a FSLL related program.
2. increase financial literacy related to later life issues
3. increase knowledge of risks, costs and financing options for health in later life (including long term care)
4. (a and b)* utilize recommended financial management practices.
5. (a and b)* improve management of credit use and/or reduce household spending in light of long term goals for later life.
6. (a and b)* initiate or increase contributions to an individual retirement savings plan.
7. (a and b)* determine retirement/future income needs.
8. (a and b)* develop a plan to achieve retirement/future income goals.
9. (a and b)* establish or revise investment goals
10. (a and b)* investigate investment options, purchase new investments and/or utilize recommended investment practices (asset allocation, dollar cost averaging etc.)
11. (a and b)* initiate or increase contributions to an employer sponsored retirement plan.
12. (a and b)* develop a plan for managing long term care needs
13. (a and b)* develop an integrated plan for achieving financial security in later life (accumulating, protecting and distributing/transferring assets.)
14. report increased financial security
15. Measure/document financial change impact of program (dollars saved, debt reduced, dollars invested)
16. indicate program was valuable
17. indicate program materials were valuable
18. would recommend the program to others

*(a and b) For these indicators, get data on a) planned action of participant and b) actual action of participant. Indicators 14 and 15 can only be measured through follow up evaluations. Indicators 16, 17 and 18 can be measured with every program evaluation.