

Take about 10 minutes to read the case study below individually. When you are all finished, go to page two.

## **PROGRAM PLANNING AND EVALUATION: THE EXTENSION EDUCATOR AND MONEY MATTERS**

Marianne Whitehorse is the Extension Director at Tribal University, a tribal college that gained land grant status under a Congressional Act in 1994. Marianne has held her job for the past six years. Before coming to the University, she taught in public schools for 25 years and then in teacher education programs at the state university. In her capacity at Tribal University, she delivers services to 23 tribal communities that are within the state. Due to the great distance between communities and Tribal University, Marianne utilizes satellite broadcasting as one component of service delivery, as well as workshops at the University and in the individual sites. Marianne holds frequent focus groups with tribal officials to determine program needs as perceived by the community members.

Marianne provides workshops and information in the areas of parenting, child development, personal financial management, health, nutrition, CDA training, and traditional crafts. Her programs are supported with funds from USDA CSREES Tribal College Extension Grant and a large NRI grant. Marianne has one program assistant. Marianne either presents the learning experiences herself, or hires outside content consultants. The Family Extension and Education Program at Tribal University also maintains a Resource Center and a "Train the Trainer Institute" that support the dissemination of relevant, culturally sensitive and accurate information in the areas of health, education and family resources.

At the last focus group, tribal officials asked Marianne to expand the financial education component of the program. Many of the communities have casinos and as a result the members receive fairly large sums of money annually. The tribal officials are concerned that the community members do not have a working knowledge of how to manage their money in the most effective ways. Those who have a basic knowledge of credit, loans, etc. do not have knowledge about investing for the future. Some of the communities have banks in the community, but many do not. The community members are frequently targeted by predatory lenders and tax preparers. Home ownership is becoming more prevalent due to the enactment of new laws concerning financing homes on tribal lands. The officials would like to have financial education workshops for community members of all ages.

She realizes that in planning her curriculum, she must be sensitive to the Native American cultural values that pertain to financial matters. She will utilize a variety of curricula including the materials from FDIC (*Money Smart*) and First Nations Oweesta Corporation (*Building Native Communities*). She has established a cooperative agreement with bankers within the service area. They are willing to present program as she needs them.

Marianne has decided to seek funding through a Tribal College Extension "Special Emphasis" grant, which is due in January. It would provide her about \$100,00 in support for two years. She sits down in her office one day and starts to plan.....

Using what you know of the case study and the diagram below, discuss as a group and list the resources/inputs, activities, outputs, outcomes, and impacts that Dusty might consider in his plan. Refer to Chapter 2, pp. 15-25. Take about 20 minutes and have one person record your answers. Then move on to page three.

RESOURCES	ACTIVITIES	OUTPUTS	SHORT- & LONG-TERM OUTCOMES	IMPACT
<p><i>In order to accomplish our set of activities we will need the following:</i></p>	<p><i>In order to address our problem or asset we will accomplish the following activities:</i></p>	<p><i>We expect the once accomplished these activities will produce the following evidence or service delivery:</i></p>	<p><i>We expect that if accomplished these activities will lead to the following changes in 1-3 then 4-6 years:</i></p>	<p><i>We expect that if accomplished these activities will lead to the following changes in 7-10 years:</i></p>
<ul style="list-style-type: none"> <li>• Financial instructors: culturally adept, linguistically adept</li> <li>• Partners: schools, casinos, banks, tribe, career development, housing, HR</li> <li>• Curricula: technology training, financial training</li> <li>• Participants: community, youth</li> </ul>	<ul style="list-style-type: none"> <li>• Classes and workshops</li> <li>• Broker service</li> <li>• Give-aways and meals</li> <li>• camps</li> <li>• childcare included</li> <li>• sessions at other programs</li> </ul>	<ul style="list-style-type: none"> <li>• <u>Products:</u> <ul style="list-style-type: none"> <li>✓ Opened accounts</li> <li>✓ Knowledge of tools: envelope budgets, ATM use</li> <li>✓ Visual understanding</li> <li>✓ Demonstrate confidence</li> <li>✓ Skill building: telemarketing lingo</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge</li> <li>• Confidence</li> <li>• Number of participants</li> <li>• Decreased bankruptcies repossessions</li> <li>• Increased bank accounts, savings</li> <li>• Trainees become trainers, teach by example</li> </ul>	<ul style="list-style-type: none"> <li>• Increase income</li> <li>• Employment</li> <li>• PELL, TANF, etc. last longer</li> <li>• Lifestyle change: self-sufficiency, retain culture, maintain culture and remain financially healthy</li> </ul>

Using the logic model that you have developed, now use the flowchart below to develop your evaluation questions. Refer to Chapter 4, pp. 35-44. Take about 20 minutes as a group and have one person record your answers.

<b>EVALUATION FOCUS AREA</b>	<b>AUDIENCE</b>	<b>QUESTION</b>	<b>USE</b>
<i>What is going to be evaluated? List those components from your logic model that you think are the most important aspects of your program. These areas will become the focus of your evaluation.</i>	<i>What key audience will have questions about your focus area? For each focus area you have identified, list the audiences that are likely to be the most interested in that area.</i>	<i>What questions will your key audience have about your program? For each focus area and audience that you have identified, list the questions they might have about your program.</i>	<i>If you answer a given question, what will that information be used for? For each audience and question you have identified, list the ways and extent to which you plan to make use of the evaluation information.</i>
<p>Will evaluate knowledge with pre- and post-tests.</p> <p>Will evaluate participation with numbers, dates met, repeat attendees, level of engagement, testimonials of life change.</p>	Bankers	What are the costs and benefits?	
		What are the roles to play?	
	Community members	<p>What is the level of commitment (time, etc.)?</p> <p>What are the choices, decisions made?</p> <p>What is the level of interaction?</p>	
		<p>How will answers be used: to harm the community? Private, personal information? Stats?</p> <p>How can we improve?</p> <p>What are the next steps?</p>	