

## INVESTMENT COMPANY INSTITUTE EDUCATION FOUNDATION MICROGRANTS FOR INVESTOR EDUCATION INNOVATION WITHIN METROPOLITAN WASHINGTON, DC

### SAMPLE GRANTEE EVALUATION FORM

(to be submitted by every grantee within two weeks of project completion)

1. How many investor education classes were taught? How many people (“participants”) received investor education and over what period of time?
2. How did you recruit participants and/or publicize the investor education program?
3. What curriculum materials were used and how did participants rate them?
4. Who provided the investor education and how did participants rate the instructor?
5. What did participants like most/least about the program?
6. What knowledge, attitudes, or skills were acquired by the participants and how were they measured?
7. Did this project meet your expectations? If not, why not?
8. What obstacles (if any) did you encounter and how were they overcome?
9. If you were repeating this project, what changes would you make (if any) and why?
10. What did you learn from this project that might be useful for other investor education programs?
11. How could this project be replicated by other schools or organizations working with the same target audience?
12. Is there any other information that would be helpful to ICIEF in evaluating this grant?