FIELD

Microenterprise Fund For Innovation, Effectiveness, Learning and Dissemination

Welcome to the MicroTest Client Outcomes Survey

What is the MicroTest Client Outcomes Survey?

• The MicroTest Client Outcomes survey provides programs with a **simple survey process** for interviewing clients and **collecting powerful data** on the outcomes clients' have experienced.

• MicroTest provides the **survey tool** as well as **instructions and guidance** on managing the survey process, conducting the interviews, and reporting the data back to MicroTest.

Why do people want Outcomes data?

Regularly tracking client outcomes data is becoming more important to US programs for several purposes:

- To assess the **effectiveness of their strategies,**
- To be **accountable to donors** and other stakeholders, and
- To build a **strong advocacy case** for microenterprise development in the US

How is the MT survey unique?

• MicroTest's survey is designed to **accommodate the wide range of program resource levels and capacities** in the microenterprise field.

•If programs already conduct surveys with clients they can **integrate the MicroTest survey into their on-going efforts.**

Our tool adapts to you

Customization Feature: Checkboxes on the introduction page allow you to customize the survey tools to your situation.

The **missing data counter** allows you to keep track of how many pieces of data you have left to provide. The data counter will read 0 when the survey data has been completely entered.

Before you begin please answer these key pre-survey questions:

Please check/uncheck the box below to configure the workbook properly

- ☐ Please check if you will be doing only the Tier 1 survey. Please see the "Tier 1 - Tier 2 Comparison" worksheet to assist you in your decision.
- ☐ Please check if you will be conducting your client interviews on a "rolling" basis. Consult the instructions guide for further information on this decision.

#1 Customization Feature

#2 Missing Data Counter

Number of missing or incorrect data points in the Outcomes Tool:
(Please complete ALL entries properly, until the indicator reads 0)
A list of all fields missing data can be found on the DataCleaning sheet

0

Baseline data enables change analysis

Baseline data. Program staff enter data on the client at intake into Section A of the survey. This provides a baseline set of data to which the client's situation at the time of the survey can be compared to understand changes in the client's situation.

Questions to be answered about client at intake

to be completed by program staff

#4 Baseline Data About Client at Intake

10.	Please classify the **Client's Business Status**: **Pre-Business:** Client did not have a business in operation **Start-up business:** client's business was in operation fewer than 12 months **Ongoing business:** client's business was in operation 12 months or more **Unknown:** you do not have business status information	❑ Pre-Business (skip to question #20- Tier 1, #17 Tier 2) ❑ Start-up Business ❑ Ongoing Business ❑ Unknown (skip to question #20- Tier 1, #17 Tier 2)
13.	If the client had a business, did s/he work full-time or part-time at their business?	❑ Full-Time ❑ Part-Time
14.	If the client had a business, on average, what were his/her annual gross business sales?	$____________________
15.	If the client had a business, what was his/her average annual draw from the business?	$____________________
16.	If the client had a business, how many paid full-time and part-time employees did they have? (full-time represents at least 35 hours of work a week)	_____ # of Full-Time Employees _____ # of Part-Time Employees ☐ No Employees
20.	Client's Annual Household Income (in dollars)	$____________________
21.	Client's Annual Household Size (including client)	_______________# in household

Survey questions are kept simple…

Many questions are asked in a **yes/no format** to keep the survey simple.

33.	On average, do (did) you work at your business part-time or seasonally or full-time? (**full-time** represents at least 35 hours of work a week)	❑ Part-Time or Seasonal ❑ Full-Time
34.	Not counting yourself, how many paid part-time or seasonal employees does (did) your business have?	______# of Paid part-time employees
35.	Not counting yourself, how many paid full-time employees does (did) your business have? (**full-time** represents at least 35 hours of work a week)	______# of Paid full-time employees
39.	Are you currently receiving TANF benefits? **#5 Simple Questions**	❑ Yes ❑ No
40.	Are you currently receiving any other public assistance?	❑ Yes ❑ No

Help for the more difficult questions

Sources of Income in 2003	Number of Months		Amount Received per Month		2003 Income Received from the Source
Salary/wages from another job(s)	12	X	$ 1,032	=	$ 12,384
Self-employment income	8	X	$ 150	=	$ 1,200
Spouse or partner's income	0	X	$ -	=	$ -
Income of other household members including relatives, non-relatives and children	0	X	$ -	=	$ -
Help from family or friends	1	X	$ 700	=	$ 700
Child support #6 Helper	6	X	$ 100	=	$ 600
Alimony Tools	0	X	$ -	=	$ -

Helper Tools are provided to assist clients in calculating the more difficult questions such as household income.

Recording your surveys is easy

The MicroTest Client Outcomes Survey Tool provides you with a **data entry page** that speeds the entry of all your survey data and allows you to transmit your data to MicroTest electronically. Much of the data entry page is formatted with **drop-down boxes** to make entering the data as quick and easy as possible.

DK | NA

Client Data Entry Sheet — **#7 Pre-loaded Drop-downs**

6 <-- number of clients with data (do not skip any rows as you are entering data)

Client ID#	1. Name	2. Enrollment Date	3. Gender	4. # loans	5. $ loans
1	Chuck	10-Jan-02	Male	1	$2,000
2	Lou	8-Apr-02	Male	1	$2,500
3	Datha	20-May-00		2	$10,000
4	Jon-Thomas	21-Apr-01		0	$0
5	Linda	6-Feb-02		0	$0
6	Kenny	8-Oct-99		3	$15,000

Male
Female
NA
DK
RF

Verify your data at a glance

		Date Cleaning Sheet				
Client ID#	Errors	1. Name	2. Enrollment Date	3. Gender	4. # loans	5. $ loans
Invalid Entries	0	0	0	0	0	0
Missing Data	317	0	2	1	1	1
1	53	Chuck	1/10/2002	Male	1	2000
2	55	Lou	MD	MD	1	2500
3	54	Datha	5/20/2000	Female	MD	10000
4	54	Jon-Thomas	MD	Male	0	0
5	54	Linda	2/6/2002	Female	0	MD
6	53	Kenny	10/8/1999	Male	3	15000

#8 Check Your Data

The **data cleaning sheet** allows you to verify the accuracy of your data by conducting a quick review for any missing data (MD) or invalid entries.

Get immediate feedback

#9 Custom Report	Country Enterprises				
	Business Sales and Owners' Draw Data				
	Average	Minimum	Maximum	Median	
Total Gross Business Sales At Intake	$28,629	$ -	$ 750,000	$11,000	N=100
Total Gross Business Sales Current year	$30,723	$ 15,000	$ 865,000	$13,564	N=80
Clients Draw from Business at intake	$8,500	$ -	$ 33,000	$4,000	N=100
Clients Draw from Business in 2003	$10,639	$ -	$ 47,000	$8,500	N=80
	Household Income and Asset Changes				
	Average		Median		
Household Income @ intake	$26,924		$20,000		N=100
Household Income current year ($)	$35,071		$30,000		N=88
	Rose	Fell	No change	DK/NA	
Income change from Last Yr to Current Yr	44	16	25	3	N=88
	50%	19%	28%	3%	N=88
Able to Save Money	31		36%		N=88
	Average	Minimum	Maximum	Median	
$ Saved at intake	$2,200	$ 50	$ 8,000	$1,500	N=100
$ Saved in current year	$2,575	$ 50	$ 10,000	$2,000	N=88

Built into the workbook is a **custom report** that gives your program an immediate look at what your clients looked like at intake vs. at the time of survey.

Learn More

To find out more about the MicroTest client outcomes survey or for information on how to join MicroTest, please contact Tamra Thetford (tamra.thetford@aspeninst.org)