

# Utah Work Success Financial Education Workshop

## Customer Satisfaction Survey

### Script

*Hi, I am [INSERT NAME] with ICF International. On [DATE], you participated in a 6-hour financial education workshop at the Department of Workforce Services Work Success office in Taylorsville on budgeting and improving credit scores led by Scott Bennett from the Fair Credit Foundation. You were kind enough to indicate you would be willing to be contacted as a follow-up to the training, and I am calling on behalf of the training providers for that follow up.*

*The organizations involved with the training are very interested in understanding if this training was satisfactory and valuable. We would like your feedback on your experience of the training. The feedback you provide during this call will be used to enhance the training for future participants. Please be assured, there are no right or wrong answers. Your name will be entered into a raffle to win a prepaid \$100 card from the Fair Credit Foundation. If your name is selected, Fair Credit Foundation will call to notify you in the next three weeks.*

*Participation in this conversation is completely voluntary. We will keep your answers private and your name will not appear on any materials associated with this conversation. You have the right to refuse to answer any question, or stop participating in this conversation at any time, without any consequence to you. The questions you will be asked have been reviewed by ICF International's Institutional Review Board (IRB) and your responses will be kept private to the extent permitted by law. If you have any questions about this process, please feel free to contact Louisa Jones at [Louisa.Jones@icfi.com](mailto:Louisa.Jones@icfi.com) or by telephone at 703-225-2269. Finally, handwritten notes will be used to document your answers for accuracy. May we begin?*

### Instrument

#### General Feedback on the Training

1. Reflecting on the training, do you have any feedback or suggestions on how it could be improved?

#### Feedback on the Credit Section of the Training

2. Do you know how to access your credit report?
3. Do you understand the information on your credit report?
4. Have you done any work cleaning up your credit score?

#### Feedback on the Budget Section of the Training

5. Drawing on your experience in the workshop, are you able to create a monthly budget for your household?
6. Have you worked on developing a budget to help you manage your money?
7. Did you share any of the budgeting or credit information you learned with your family or friends?

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**Feedback on the Debt Section of the Training**

8. Thinking about what you learned about debt, do you know how to manage your debt?
9. As a result of the training, have you sought any additional help in managing your debt?

**Feedback on the Financial Management Resource Section of the Training**

10. Do you know what financial management resources (e.g., VITA, credit counseling, savings accounts, IDA programs) are available?
11. Have you taken more financial management classes?  
[If no] Do you plan to?  
[If yes] Where?
12. Have you scheduled any credit counseling through some place like Fair Credit Foundation? Are you interested in doing so? Do you know what services they provide? Would you know how to go about contacting them?
13. Did you have a bank account when you took the training?  
[If no] Have you opened a checking or savings account since you took the training?  
[If yes] Have you contributed to your current bank account since you took the training?
14. Have you thought any more about learning about or pursuing applying for an Individual Development Account where your savings towards a new home or education can receive a match of funds?
15. Have you made any other changes in your behavior, such as avoiding payday lenders or choosing to pay more than the monthly minimums or make a payment plan on any of your debt? Is that something you've considered?

**General Feedback on the Training**

16. Do you have any additional feedback or suggestions on how the training could be improved?

*Thanks so much for your willingness to help us improve this program. We wish you the very best.*