

Financial Capability Integration Toolkit Feedback Survey for Pilot Sites

INTRODUCTION

The purpose of this survey is to collect your feedback on the Financial Capability Integration Toolkit. One person from your organization should complete the survey after collecting feedback from the staff members who used components the toolkit. We will use your feedback to revise the toolkit, so we appreciate you piloting it and sharing your candid feedback on this survey.

Organization: _____

BACKGROUND INFORMATION

1. What services does your organization provide? (Select all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> Workforce Development | <input type="checkbox"/> Youth Services |
| <input type="checkbox"/> Transitional Housing | <input type="checkbox"/> Early Childhood Education |
| <input type="checkbox"/> Homeownership | <input type="checkbox"/> Small Business Development |
| <input type="checkbox"/> Emergency Services (e.g., utility assistance, food security) | <input type="checkbox"/> Disability Services |
| <input type="checkbox"/> Health | <input type="checkbox"/> Financial Capability Services |
| | <input type="checkbox"/> Other _____ |

2. How many people does your organization serve per year?

3. How many employees does your organization have?

4. How would you rate your current level of experience in providing financial capability services (e.g., financial education, counseling, or coaching; credit and debt management; access to safe and affordable financial products; savings mechanisms; tax credits and filing assistance; access to federal and state benefits)?

- Very experienced
- Experienced
- Somewhat experienced
- Not at all experienced

5. What were your goals in using this toolkit?

FEEDBACK ON THE OVERALL TOOLKIT

6. How effective was the introduction in helping you understand financial capability strategies?

- Very effective
- Effective
- Somewhat effective
- Not effective

Please elaborate on your response: _____

7. How organized was the toolkit content?

- Very organized
- Organized
- Somewhat organized
- Not organized

Please elaborate on your response: _____

8. How effective were the instructions in helping you understand how to use the tools?

- Very effective
- Effective
- Somewhat effective
- Not effective

Please elaborate on your response: _____

9. How useful was this toolkit in identifying strategies that support your program outcomes and organizational goals?

- Very useful
- Useful
- Somewhat useful
- Not useful

Please elaborate on your response: _____

10. How likely is it that your organization will use this toolkit in the future?

- Very likely
- Likely
- Somewhat likely
- Not likely

Please elaborate on your response: _____

FEEDBACK ON THE TOOLS

Questions 11-21 ask if you used each tool of the toolkit. If you used a specific tool, the next question will allow you to rate the usefulness of the tool. If you did not use the tool, the next question will allow you to indicate why you did not use the tool.

11. Did you use Tool 1: Target Population Analysis?

- Yes or No

If yes, how useful was Tool 1: Target Population Analysis?

- Very useful
- Useful
- Somewhat useful
- Not useful

If no, why did you not use *Tool 1: Target Population Analysis*? (Select all that apply.)

- The tool is not relevant to our work.
- This tool was confusing and we did not understand it.
- We were not ready to use the tool yet, but we plan to use it in the future.
- Other _____

12. Did you use *Tool 2: Defining Outcomes for the Target Population*?

- Yes or No

If yes, how useful was *Tool 2: Defining Outcomes for the Target Population*?

- Very useful
- Useful
- Somewhat useful
- Not useful

If no, why did you not use *Tool 2: Defining Outcomes for the Target Population*? (Select all that apply.)

- The tool is not relevant to our work.
- This tool was confusing and we did not understand it.
- We were not ready to use the tool yet, but we plan to use it in the future.
- Other _____

13. Did you use *Tool 3: Select Financial Capability Strategies to Complete Your Theory of Change*?

- Yes or No

If yes, how useful was *Tool 3: Select Financial Capability Strategies to Complete Your Theory of Change*?

- Very useful
- Useful
- Somewhat useful
- Not useful

If no, why did you not use *Tool 3: Select Financial Capability Strategies to Complete Your Theory of Change*? (Select all that apply.)

- The tool is not relevant to our work.
- This tool was confusing and we did not understand it.
- We were not ready to use the tool yet, but we plan to use it in the future.
- Other _____

14. Did you use *Tool 4: Assess Internal Capacity to Provide Financial Capability Services*?

- Yes or No

If yes, how useful was *Tool 4: Assess Internal Capacity to Provide Financial Capability Services*?

- Very useful
- Useful
- Somewhat useful
- Not useful

If no, why did you not use *Tool 4: Assess Internal Capacity to Provide Financial Capability Services*? (Select all that apply.)

- The tool is not relevant to our work.
- This tool was confusing and we did not understand it.
- We were not ready to use the tool yet, but we plan to use it in the future.
- Other _____

15. Did you use *Tool 5: Community Mapping*?

- Yes or No

If yes, how useful was *Tool 5: Community Mapping*?

- Very useful
- Useful
- Somewhat useful
- Not useful

If no, why did you not use *Tool 5: Community Mapping*? (Select all that apply.)

- The tool is not relevant to our work.
- This tool was confusing and we did not understand it.
- We were not ready to use the tool yet, but we plan to use it in the future.
- Other _____

16. Did you use *Tool 6: Select an Integration Approach*?

- Yes or No

If yes, how useful was *Tool 6: Select an Integration Approach*?

- Very useful
- Useful
- Somewhat useful
- Not useful

If no, why did you not use *Tool 6: Select an Integration Approach*? (Select all that apply.)

- The tool is not relevant to our work.
- This tool was confusing and we did not understand it.
- We were not ready to use the tool yet, but we plan to use it in the future.
- Other _____

17. Did you use *Tool 7A: Create a Referral Pipeline*?

- Yes or No

If yes, how useful was *Tool 7A: Create a Referral Pipeline*?

- Very useful
- Useful
- Somewhat useful
- Not useful

If no, why did you not use *Tool 7A: Create a Referral Pipeline*? (Select all that apply.)

- The tool is not relevant to our work.
- This tool was confusing and we did not understand it.
- We were not ready to use the tool yet, but we plan to use it in the future.

- Other _____

18. Did you use *Tool 7B: Establish a Formal Partnership*?

- Yes or No

If yes, how useful was *Tool 7B: Establish a Formal Partnership*?

- Very useful
- Useful
- Somewhat useful
- Not useful

If no, why did you not use *Tool 7B: Establish a Formal Partnership*? (Select all that apply.)

- The tool is not relevant to our work.
- This tool was confusing and we did not understand it.
- We were not ready to use the tool yet, but we plan to use it in the future.
- Other _____

19. Did you use *Tool 7C: Do-It-Yourself Implementation Plan*?

- Yes or No

If yes, how useful was *Tool 7C: Do-It-Yourself Implementation Plan*?

- Very useful
- Useful
- Somewhat useful
- Not useful

If no, why did you not use *Tool 7C: Do-It-Yourself Implementation Plan*? (Select all that apply.)

- The tool is not relevant to our work.
- This tool was confusing and we did not understand it.
- We were not ready to use the tool yet, but we plan to use it in the future.
- Other _____

20. Did you use *Tool 8: Build Your Logic Model*?

- Yes or No

If yes, how useful was *Tool 8: Build Your Logic Model*?

- Very useful
- Useful
- Somewhat useful
- Not useful

If no, why did you not use *Tool 8: Build Your Logic Model*? (Select all that apply.)

- The tool is not relevant to our work.
- This tool was confusing and we did not understand it.
- We were not ready to use the tool yet, but we plan to use it in the future.
- Other _____

21. Did you use *Supplemental Tool: Gain Support from Key Stakeholders*?

- Yes or No

If yes, how useful was *Supplemental Tool: Gain Support from Key Stakeholders*?

- Very useful
- Useful
- Somewhat useful
- Not useful

If no, why did you not use *Supplemental Tool: Gain Support from Key Stakeholders*? (Select all that apply.)

- The tool is not relevant to our work.
- This tool was confusing and we did not understand it.
- We were not ready to use the tool yet, but we plan to use it in the future.
- Other _____

22. How effective were Tools 1-3 in helping you create a Theory of Change (Phase I)?

- Very effective
- Effective
- Somewhat effective
- Not effective
- I did not use these tools

23. How effective were Tools 4-6 in helping you create an integration strategy (e.g., refer, partner, DIY; in Phase II)?

- Very effective
- Effective
- Somewhat effective
- Not effective
- I did not use these tools

24. How effective were Tools 7-8 in helping you develop a plan for implementing your strategy (Phase III)?

- Very effective
- Effective
- Somewhat effective
- Not effective
- I did not use these tools

ADDITIONAL FEEDBACK

25. How many people at your organization or your partner organizations were involved in implementing the toolkit? _____

26. Who was involved in implementing the toolkit (from your organization and partner organizations)?

- Executive leaders
- Program directors or managers
- Program coordinators
- Direct service providers
- Other _____

27. How likely is it that you will recommend this toolkit to other organizations?

- Very likely
- Likely
- Somewhat likely
- Not likely

Please elaborate on your response: _____

28. What was most helpful about this toolkit?

29. What was least helpful about this toolkit?

30. How can we improve this toolkit?

31. What additional feedback do you have about this toolkit?

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