OMB Control No**.:**  0970-0401

Expiration Date: 4/30/2015

**Financial Capability Integration Toolkit**

**Feedback Survey for Reviewers**

**INTRODUCTION**

*The purpose of this survey is to collect your feedback on the Financial Capability Integration Toolkit. If more than one person from your organization reviewed the toolkit, one person from your organization should complete the survey after collecting feedback from the staff members who reviewed it. We will use your feedback to revise the toolkit, so we appreciate you your candid feedback on this survey.*

**Organization:** *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

**BACKGROUND INFORMATION**

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

* Workforce Development
* Transitional Housing
* Homeownership
* Emergency Services (e.g., utility assistance, food security)
* Health
  + Youth Services
* Early Childhood Education
* Small Business Development
* Disability Services
* Financial Capability Services
* Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **How many people does your organization serve per year?** *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
2. **How many employees does your organization have?** *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
3. **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

**FEEDBACK ON THE OVERALL TOOLKIT**

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

* Very effective
* Effective
* Somewhat effective
* Not effective

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **How organized was the toolkit content?**

* Very organized
* Organized
* Somewhat organized
* Not organized

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **Overall, this toolkit would be useful in my work.**

* Strongly agree
* Agree
* Somewhat agree
* Do not agree

1. **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**

1. **How useful do you think *Tool 1: Target Population Analysis* would be for your organization?**

* Very Useful
* Useful
* Somewhat useful
* Not useful
* I did not review this tool

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **How useful do you think *Tool 2: Defining Outcomes for the Target Population* would be for your organization?**

* Very Useful
* Useful
* Somewhat useful
* Not useful
* I did not review this tool

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **How useful do you think *Tool 3: Select Financial Capability Strategies to Complete Your Theory of Change* would be for your organization?**

* Very Useful
* Useful
* Somewhat useful
* Not useful
* I did not review this tool

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **How useful do you think *Tool 4: Assess Internal Capacity to Provide Financial Capability Services* would be for your organization?**

* Very Useful
* Useful
* Somewhat useful
* Not useful
* I did not review this tool

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **How useful do you think *Tool 5: Community Mapping* would be for your organization?**

* Very Useful
* Useful
* Somewhat useful
* Not useful
* I did not review this tool

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **How useful do you think *Tool 6: Select an Integration Approach* would be for your organization?**

* Very Useful
* Useful
* Somewhat useful
* Not useful
* I did not review this tool

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **How useful do you think *Tool 7A: Create a Referral Pipeline* would be for your organization?**

* Very Useful
* Useful
* Somewhat useful
* Not useful
* I did not review this tool

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **How useful do you think *Tool 7B: Establish a Formal Partnership* would be for your organization?**

* Very Useful
* Useful
* Somewhat useful
* Not useful
* I did not review this tool

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **How useful do you think *Tool 7C: Do-It-Yourself Implementation Plan* would be for your organization?**

* Very Useful
* Useful
* Somewhat useful
* Not useful
* I did not review this tool

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **How useful do you think *Tool 8: Build Your Logic Model* would be for your organization?**

* Very Useful
* Useful
* Somewhat useful
* Not useful
* I did not review this tool

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **How useful do you think the *Supplemental Tool: Gain Support from Key Stakeholders* would be for your organization?**

* Very Useful
* Useful
* Somewhat useful
* Not useful
* I did not review this tool

*Please elaborate on your response: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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

* Very effective
* Effective
* Somewhat effective
* Not effective
* I did not review these tools

1. **How effective would Tools 4-6 be 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 review these tools
2. **How effective would Tools 7-8 be in helping you develop a plan for implementing your strategy (Phase III)?**

* Very effective
* Effective
* Somewhat effective
* Not effective
* I did not review these tools

**ADDITIONAL FEEDBACK**

1. **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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. **What is the most helpful about this toolkit? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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1. **What is the least helpful about this toolkit? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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1. **How can we improve this toolkit? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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1. **What additional feedback do you have about this toolkit? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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