

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 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

FEEDBACK ON THE OVERALL TOOLKIT

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

- Very effective
- Effective
- Somewhat effective
- Not effective

Please elaborate on your response: _____

6. How organized was the toolkit content?

- Very organized
- Organized
- Somewhat organized
- Not organized

Please elaborate on your response: _____

7. 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: _____

8. Overall, this toolkit would be useful in my work.

- Strongly agree
- Agree
- Somewhat agree
- Do not agree

9. 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

10. 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: _____

11. 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: _____

12. 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: _____

13. 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: _____

14. 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: _____

15. 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: _____

16. 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: _____

17. 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: _____

18. 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: _____

19. 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: _____

20. 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: _____

21. 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

22. 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

23. 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

24. 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: _____

25. What is the most helpful about this toolkit?

26. What is the least helpful about this toolkit?

27. How can we improve this toolkit?

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

THE PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13)

Public reporting burden of this collection of information is estimated to average 0.5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. An agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a currently valid OMB control number.