

## Instrument 3B: Case Manager Training Post-Survey

*Thank you for completing this survey as part of our evaluation of this training on Your Money, Your Goals. This information is being collected to help CFPB improve the Your Money, Your Goals materials. CFPB and its contractor will review responses to identify potential enhancements to the materials.*

*Complete this survey providing short written responses and selecting from response options, as prompted by the survey questions. Please note that your responses will be kept private to the extent permitted by law and when survey results are reported none of your answers will be directly connected to you. Please see the Paperwork Reduction Act statement and Privacy Notice on the last page of this survey.*

The organization sponsoring this delivery of the Consumer Financial Protection Bureau’s *Your Money, Your Goals* (may be the same as or different from your employer):

**1) Please check any of the following that describe the clients you work with (check all that apply).**

Geography

- Mostly Urban
- Mostly Suburban
- Mostly Rural

Gender

- Mostly Female
- Mostly Male

**2) After participating in this training, how well-prepared do you feel to use *Your Money, Your Goals* with your clients?**

- Well-prepared
- Somewhat prepared
- Not prepared

**3) Please indicate the extent to which you agree or disagree with each of the following statements. If you disagree with any of the statements, please explain below.**

	Strongly Agree	Agree	Disagree	Strongly Disagree
The trainer was knowledgeable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The trainer’s style was engaging and interesting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The trainer used activities beyond lecture and discussion to explain the Toolkit.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The trainer listened effectively to contributions from me and other participants.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

<i>Your Money, Your Goals</i> will improve my ability to meet the needs of my clients.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel prepared to use the tools and resources in the Financial Empowerment Training Toolkit with clients.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I plan to use the tools and resources in <i>Your Money, Your Goals</i> with clients.				

**3) How confident are you in your ability to...**

	<b>Very Confident</b>	<b>Confident</b>	<b>Somewhat Confident</b>	<b>Not at All Confident</b>
Understand core financial management topics, such as budgeting, saving, and setting financial goals?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Discuss core financial management topics with your clients?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assess your clients' financial condition or situation?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Get help if you or your clients have questions about financial issues?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Refer clients to community resources such as credit-debt counseling and tax filing assistance?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Know where to go for unbiased information or help in working with clients?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Help clients manage their financial challenges?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide the right financial content at the right time in the context of your case work with clients?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access and use tools and materials from the Consumer Financial Protection Bureau (CFPB) through its consumer website?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**4) The Financial Empowerment Training Toolkit includes a variety of tools and information on a number of different topics. How useful do you think you will find each of the following tools and resources?**

	<b>Very Useful</b>	<b>Useful</b>	<b>Somewhat Useful</b>	<b>Not at All Useful</b>
<b>Module 2: Assessing the Situation</b>				

	Very Useful	Useful	Somewhat Useful	Not at All Useful
Tool 1—Financial empowerment self-assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Client goal and financial situation assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 3: Starting the Conversation</b>				
Module content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 4: Emotional and cultural influences on financial decisions</b>				
Module content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 5: Using the Toolkit</b>				
Tool 1—Client financial empowerment checklist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 6: Setting Goals</b>				
Tool 1—Goal-setting tool	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 7: Saving for the Unexpected, Emergencies, and Goals</b>				
Tool 1—Savings plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Benefits and asset limits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Finding a safe place for savings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 8: Managing Income and Benefits</b>				
Tool 1—Income and financial resource tracker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Strategies for increasing cash and sources of financial resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Cash, paychecks, direct deposit, payroll cards, and EBT—understanding the benefits and risks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—Increasing income through tax credits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Very Useful	Useful	Somewhat Useful	Not at All Useful
<b>Module 9: Paying Bills and Other Expenses</b>				
Tool 1—Spending tracker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Bill calendar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Strategies for cutting expenses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—When cash is short—prioritizing bills and spending	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 10: Managing Cash Flow</b>				
Tool 1—Cash flow budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Cash flow calendar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Improving cash flow checklist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 11: Dealing with Debt</b>				
Tool 1—Debt management worksheet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Debt-to-income worksheet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Debt reduction worksheet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—Student loan debt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 5—When debt collectors call	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 12: Understanding Credit Reports and Scores</b>				
Tool 1—Getting your credit reports and scores	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Credit report review checklist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Improving credit reports and scores	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 13: Evaluating Financial Service Providers, Products, and Services</b>				
Tool 1—Selecting a financial service provider	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Evaluating financial service providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Very Useful	Useful	Somewhat Useful	Not at All Useful
Tool 3—Types of financial services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—Opening an account checklist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 14: Protecting Consumer Rights</b>				
Tool 1—Red flags	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Protecting your identity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Submitting a complaint	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—Learning more about consumer protection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Paperwork Reduction Act

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a valid OMB control number. The OMB control number for this collection is 3170-0038. It expires on 08/31/2016. The time required to complete this information collection is estimated to average approximately 10 minutes per response, including the time for reviewing any instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The obligation to respond to this collection of information is voluntary. Comments regarding this collection of information, including the estimated response time, suggestions for improving the usefulness of the information, or suggestions for reducing the burden to respond to this collection should be submitted to Bureau at the Consumer Financial Protection Bureau (Attention: PRA Office), 1700 G Street NW, Washington, DC 20552, or by email to PRA@cfpb.gov.

### Privacy Notice

Information you provide in response to this survey will help the survey sponsor the Consumer Financial Protection Bureau (“CFPB”) evaluate the effectiveness of the *Your Money, Your Goals* toolkit, and to assess the scope of partner organizations’ use of the toolkit.

The CFPB will not obtain or access any information that directly identifies respondents, and any answers or comments you provide will not be tied to you individually. The agency will only obtain and access de-identified results and aggregated analyses of those results. Any directly identifying information will only be used by ICF International (survey facilitator) and partner organizations to facilitate distribution and collection of surveys and survey responses. Survey responses will not be shared and will be kept private except as required by law.

This collection of information is authorized by Pub. L. No. 111-203, Title X, Sections 1013 and 1022, codified at 12 U.S.C. §§ 5493 and 5512.

Your participation is voluntary, and you may withdraw participation at any time.