

## Instrument 4: Follow-Up Survey for Case Managers and Other Front Line Staff

*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 the delivery of the Consumer Financial Protection Bureau’s *Your Money, Your Goals* that you attended (may be the same as or different from your employer):

**1) Since being trained in the use of *Your Money, Your Goals*...**

	# of Clients
With how many clients have you discussed financial information?	
With how many clients have you used tools and resources from <i>Your Money, Your Goals</i> ?	
How many clients have you referred to other financial resources (such as credit counselors, free tax preparation, financial coaching, etc.)?	

**2) Do you think *Your Money, Your Goals* has affected your interactions with clients?**

- Yes, it has affected them a lot
- Yes, it has affected them some
- Yes, it has affected them a little
- No, it has not affected my interactions with clients

**2b) Please explain your answer to this question.**

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**3) Have clients had any financial issues or made any requests related to financial topics that you have not known how to address? If so, please describe below.**

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**4) 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"/>

5) *Your Money, Your Goals* includes a variety of tools and information on a number of different topics. In your work, how useful have you found each of the following tools and resources?

	With how many clients have you used this tool?	How useful did you and your clients find this tool?			
		Very Useful	Useful	Somewhat Useful	Not at All Useful
<b>Module 2: Assessing the Situation</b>					
Tool 1—Financial Empowerment Self-Assessment	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Client Goal and Financial Situation Assessment	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 3: Starting the Conversation</b>					
Module content	_____ clients <input type="checkbox"/> None	<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	_____ clients <input type="checkbox"/> None	<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	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 6: Setting Goals</b>					
Tool 1—Goal-Setting Tool	_____ clients <input type="checkbox"/> None	<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	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Benefits and Asset Limits	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	With how many clients have you used this tool?	How useful did you and your clients find this tool?			
		Very Useful	Useful	Somewhat Useful	Not at All Useful
Tool 3—Finding a Safe Place for Savings	_____ clients <input type="checkbox"/> None	<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	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Strategies for Increasing Cash and Sources of Financial Resources	_____ clients <input type="checkbox"/> None	<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	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 9: Paying Bills and Other Expenses</b>					
Tool 1—Spending Tracker	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Bill Calendar	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Strategies for Cutting Expenses and Other Uses of Financial Resources	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—When Cash is Short—Prioritizing Bills and Spending					

	With how many clients have you used this tool?	How useful did you and your clients find this tool?			
		Very Useful	Useful	Somewhat Useful	Not at All Useful
<b>Module 10: Managing Cash Flow</b>					
Tool 1—Cash Flow Budget	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Cash Flow Calendar	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Improving Cash Flow Checklist	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 11: Dealing with Debt</b>					
Tool 1—Debt Management Worksheet	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Debt-to-Income Worksheet	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Debt Reduction Worksheet	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—Student Loan Debt	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 5—When Debt Collectors Call	_____ clients <input type="checkbox"/> None	<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	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Credit Report Review Checklist	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Improving Credit Reports and Scores	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	With how many clients have you used this tool?	How useful did you and your clients find this tool?			
		Very Useful	Useful	Somewhat Useful	Not at All Useful
<b>Module 13: Evaluating Financial Service Providers, Products, and Services</b>					
Tool 1—Selecting Financial Service Providers	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Evaluating Financial Service Providers	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Types of Financial Services	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—Opening an Account Checklist	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 14: Protecting Consumer Rights</b>					
Tool 1—Red Flags	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Protecting Your Identity	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Learning More about Consumer Protection	_____ clients <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—Submitting a Complaint	_____ clients <input type="checkbox"/> None	<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 20 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.