Instrument 2: Survey for Trainer Feedback on Curriculum Following Usage with Case Managers

Respondents: Trainer Cohort Members

Collection Strategy: Paper Form

Thank you for completing this survey as part of our evaluation of this web-based training on the FET Toolkit. Please note that the Bureau intends to keep your responses private to the extent permitted by law, and when survey results are reported none of your answers will be connected to you or your organization.

Please enter your name: ___________________________________

Contextual Information

1) **How many case managers participated in this training? ____________**

2) **In what city and state was the training held? ___________________________**

3) **What was the total duration of this training (excluding breaks)? ____________________**

4) **Describe the backgrounds of the case managers that participated in this training and the range of the organizations for which they work.**

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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-XXXX. It expires on MM/DD/YYYY. 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 CFPB_Public_PRA@cfpb.gov.

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5) Will the case managers you train usually be working with their clients face-to-face or by telephone?

- ○ Face-to-face
- ○ By telephone
- ○ Both face-to-face and by telephone

6) What types of services are clients generally seeking when they contact the case managers that you will be training? (For example, are they looking for assistance with housing? Assistance with health issues?, etc.)

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Feedback on Toolkit Modules

In the following section of the survey, we would like you to describe your experiences and satisfaction with each of the individual modules in the Financial Empowerment Toolkit. **If you need additional space for any of your answers, please use the back of the page.**

Module	On a scale of 1 to 5, how useful do you think these resources will be to the participants?	How many minutes did you spend discussing this module?	What content in this module will be most useful for participants?	What content or tools in this module will be less useful for participants, if any, and why?	What feedback do you have for how this module should be revised?
Module 1: Introduction to the Toolkit	☐ 5: Extremely useful ☐ 4 ☐ 3 ☐ 2 ☐ 1: Not at all useful	____________ ☐ I did not discuss this module during this training			
Module 2: Assessing the Situation	☐ 5: Extremely useful ☐ 4 ☐ 3 ☐ 2 ☐ 1: Not at all useful	____________ ☐ I did not discuss this module during this training			

Module	On a scale of 1 to 5, how useful do you think these resources will be to the participants?	How many minutes did you spend discussing this module?	What content in this module will be most useful for participants?	What content or tools in this module will be less useful for participants, if any, and why?	What feedback do you have for how this module should be revised?
Module 3: Starting the Conversation	☐ 5: Extremely useful ☐ 4 ☐ 3 ☐ 2 ☐ 1: Not at all useful	__________ ☐ I did not discuss this module during this training			
Module 4: Setting Goals	☐ 5: Extremely useful ☐ 4 ☐ 3 ☐ 2 ☐ 1: Not at all useful	__________ ☐ I did not discuss this module during this training			

Module	On a scale of 1 to 5, how useful do you think these resources will be to the participants?	How many minutes did you spend discussing this module?	What content in this module will be most useful for participants?	What content or tools in this module will be less useful for participants, if any, and why?	What feedback do you have for how this module should be revised?
Module 5: Saving for the Unexpected, Emergencies, and Goals	☐ 5: Extremely useful ☐ 4 ☐ 3 ☐ 2 ☐ 1: Not at all useful	____________ ☐ I did not discuss this module during this training			
Module 6: Managing Cash Flow	☐ 5: Extremely useful ☐ 4 ☐ 3 ☐ 2 ☐ 1: Not at all useful	____________ ☐ I did not discuss this module during this training			

Module	On a scale of 1 to 5, how useful do you think these resources will be to the participants?	How many minutes did you spend discussing this module?	What content in this module will be most useful for participants?	What content or tools in this module will be less useful for participants, if any, and <u>why</u>?	What feedback do you have for how this module should be revised?
Module 7: Dealing with Debt	☐ 5: Extremely useful ☐ 4 ☐ 3 ☐ 2 ☐ 1: Not at all useful	____________ ☐ I did not discuss this module during this training			
Module 8: Understanding Credit Reports and Scores	☐ 5: Extremely useful ☐ 4 ☐ 3 ☐ 2 ☐ 1: Not at all useful	____________ ☐ I did not discuss this module during this training			

Module	On a scale of 1 to 5, how useful do you think these resources will be to the participants?	How many minutes did you spend discussing this module?	What content in this module will be most useful for participants?	What content or tools in this module will be less useful for participants, if any, and why?	What feedback do you have for how this module should be revised?
Module 9: Evaluating Financial Service Providers, Products, and Services	☐ 5: Extremely useful ☐ 4 ☐ 3 ☐ 2 ☐ 1: Not at all useful	____________ ☐ I did not discuss this module during this training			
Module 10: Protecting Consumer Rights	☐ 5: Extremely useful ☐ 4 ☐ 3 ☐ 2 ☐ 1: Not at all useful	____________ ☐ I did not discuss this module during this training			

Overall Reaction and Feedback

7) Is there anything that you did during this training that worked particularly well?

8) Is there anything that you would do differently if you were to do this training again?

9) Are there any topics that you believe should be covered in more detail in the Toolkit, or any additional tools or resources that should be added?

10) Thinking about the goal of equipping case managers to integrate financial empowerment into their work, please provide any other suggestions you have for how the Toolkit could be improved.