

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

**Respondents: Case Managers**

**Collection Strategy: Paper Form**

*Thank you for completing this survey as part of our evaluation of this 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 your organization.*

Your organization/agency: \_\_\_\_\_

**1) Please check any of the following that describe the clients with whom the case managers you train will be working (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 the FET Toolkit with your clients?**

- Well-prepared
- Somewhat prepared
- Not prepared

### 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 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 CFPB\_Public\_PRA@cfpb.gov.

**2b) [If respondent answers “somewhat prepared” or “not prepared”] In what ways do you not feel prepared?**

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**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.**

	<b>Strongly Agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
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"/>
The Financial Empowerment Training Toolkit 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 the Financial Empowerment Training Toolkit 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?**

	Very Useful	Useful	Somewhat Useful	Not at All Useful
<b>Module 2: Assessing the Situation</b>				
Tool 1—Financial Empowerment Self-Assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Opportunities for Providing Financial Empowerment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Client Goals and Financial Situation Assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 3: Assessing the Situation</b>				
Information on When and How to Bring Up Money Topics with Clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 4: Setting Goals</b>				
Information on How to Set and Reach Financial Goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 5: Saving for the Unexpected, Emergencies, and Goals</b>				
Tool 1—Savings Plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Very Useful	Useful	Somewhat Useful	Not at All Useful
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 6: Managing Cash Flow</b>				
Tool 1—Income and Spending Tracker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Cash Flow Budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Strategies for Increasing Cash and Sources of Financial Resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—Strategies for Cutting Expenses and Other Uses of Financial Resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 5—When Cash Is Short	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	Very Useful	Useful	Somewhat Useful	Not at All Useful
<b>Module 7: 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"/>
<b>Module 8: Understanding Credit Reports and Scores</b>				
Tool 1—Getting Your Credit Reports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Getting Your Credit Scores	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Credit Report Review Checklist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—Improving Credit Reports and Scores	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Module 9: 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"/>
Tool 3—Basic Definition 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 10: 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—Learning More about Consumer Protection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**5) What pieces of the Financial Empowerment Training Toolkit, if any, do you think will be the most useful to you and your clients? Why?**

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**6) Are there any topics that you wish had been covered in more detail in this training or in the Toolkit itself?**

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**7) Thinking about the goal of equipping case managers to integrate financial empowerment tools into their work with clients, please provide any suggestions you have for how this training could be improved.**

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