

Instrument 4: Follow-Up Survey for *Your Money, Your Goals* users

*Thank you for completing this survey as part of our evaluation of this training on **Your Money, Your Goals**. 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) Since being trained in the use of *Your Money, Your Goals*...

	# of Clients
With how many of the people you serve have you discussed financial information?	
With how many of the people you serve have you used tools and resources from <i>Your Money, Your Goals</i> ?	
How many of them 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 the people you serve?

- 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.

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

	Very Confident	Confident	Somewhat Confident	Not at All Confident
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 the people you serve?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assess individuals' financial condition or situation?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Very Confident	Confident	Somewhat Confident	Not at All Confident
Get help if you or the people you serve have questions about financial issues?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Refer people 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 the people you serve?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Help people 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 work with individuals?	<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) How well do these statements describe you or your situation?

Part 1

This statement describes me	Completely	Very Well	Somewhat	Very Little	Not at all
I could handle a major unexpected expense	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am securing my financial future	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Because of my money situation, I feel like I will never have the things I want in life	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I can enjoy life because of the way I'm managing my money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am just getting by financially	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am concerned that the money I have or will save won't last	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Part 2: How often does this statement apply to you?

This statement applies to me	Always	Often	Sometimes	Rarely	Never
7. Giving a gift for a wedding, birthday or other occasion would put a strain on my finances for the month	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. I have money left over at the end of the month	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. I am behind with my finances	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. My finances control my life	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Part 3: Tell us about yourself.

	18-61	62+
How old are you?	<input type="radio"/>	<input type="radio"/>

OMB Review

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 people have you used this tool?	How useful did you and your clients find this tool?			
		Very Useful	Useful	Somewhat Useful	Not at All Useful
Introduction					
Tool 1—Financial Empowerment Checklist	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Introduction: Assessing the Situation					
Tool 1—My money picture	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Module 1: Setting Goals					
Tool 1—Goal-Setting Tool	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2 – Planning for Life Events and Large Purchases	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3 – Buying a car	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Module 2: Saving for Emergencies, Bills, and Goals					
Tool 1—Savings Plan	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Saving and Benefits: Understanding Asset Limits	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Finding a Safe Place for Savings	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4 – Increasing your income through tax credits	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	With how many people have you used this tool?	How useful did you and your clients find this tool?			
		Very Useful	Useful	Somewhat Useful	Not at All Useful
Module 3: Tracking and Managing Income and Benefits					
Tool 1—Income and Resource Tracker	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Ways to receive income and benefits: Know your options	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Ways to increase income and resources	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Module 4: Paying Bills and Other Expenses					
Tool 1—Spending Tracker	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Bill Calendar	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3 – Ways to pay bills: Know your options	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Strategies for cutting expenses	_____ people <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 Planning Spending	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Module 5: Getting through the Month					
Tool 1—Cash Flow Budget	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Cash Flow Calendar	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	With how many people 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—Improving Cash Flow Checklist	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Module 6: Dealing with Debt					
Tool 1—Debt Worksheet	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Debt-to-Income Worksheet	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Reducing Debt Worksheet	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—Repaying Student Loans	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 5—When Debt Collectors Call	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Module 7: Understanding Credit Reports and Scores					
Tool 1—Getting Your Credit Reports and Scores	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Credit Report Review Checklist	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Improving Credit Reports and Scores	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4 – Keeping records to show you’ve paid your bills	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Module 8: Money services, cards, accounts, and loans: Finding what works for you					

	With how many people 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 1— Know your options: Money services, cards, accounts, and loans	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2— Ask questions: Choosing where to get what you need	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3— Money services and banking basics	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—Opening an Account Checklist	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 5 - Money transfers and remittances: What you need to know	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Module 14: Protecting Your Money					
Tool 1—Submitting a Complaint to the CFPB	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2—Protecting Your Identity	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3—Red Flags	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4—Learning More about Consumer Protection	_____ people <input type="checkbox"/> None	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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.

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 XX/XX/20XX. The time required to complete this information collection is estimated to average approximately 25 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_PRA@cfpb.gov.