

Consumer Financial Protection Bureau Financial Education Exchange (CFPB FinEx) Customer Satisfaction Survey

Survey Introduction Page

Welcome to the Consumer Financial Protection Bureau Financial Education Exchange customer satisfaction survey.

We are interested in getting your feedback on CFPB FinEx and on the Bureau's tools and resources for financial educators like you. This online survey will give us information about what is working, what could be improved upon, and what directions you would like us to take in the future in order to best support you in advancing the financial well-being of the people you serve.

The survey will take approximately 5-10 minutes to complete and is authorized by the Office of Management and Budget Control No. 1090-0007 which expires September 30, 2021. Your responses will remain anonymous and stored on a secure server. A third party, CFI Group, is managing the entire data collection process. Please feel free to be completely candid.

Please click "next" below to begin the survey.

If you have any questions or feedback regarding the survey, please email CFPB_FinEx@cfpb.gov.

If you require technical assistance with the survey, please email SurveyHelp@cfigroup.com.

 Screener

SERVUSE. How recently have you used each of the following CFPB resources in your financial education work?

SERVICE AREA	Within the past few months	Within the past year	More than a year ago	Never
A. Live events and trainings (e.g., regional meetings, conferences, webinars, etc.)				
B. Brochures and printed materials ordered in bulk				
C. Online tools (e.g., CFPB website, Buying a House online tools, etc.)				
D. Research based tools and material such as the Financial Well-Being scale				
E. LinkedIn discussion group				
F. Other, please specify				

[If all SERVUSE = More than a year ago or Never, then exit survey]

TERMINATE: Thank you for your willingness to participate in this survey. In this survey, we are seeking feedback from people with more recent experiences with CFPB’s Financial Education resources, so we have no further question for you at this time.

FAMILIAR. How familiar are you with the products and services provided by the Consumer Financial Protection Bureau’s Financial Education Exchange program (CFPB FinEx)?

- a. Very familiar
- b. Somewhat familiar
- c. Not at all familiar **[EXIT SURVEY]**

Background Questions

ZIP. Please enter the zip code of your work location

ROLE. What best describes your role within the organization? Select all that apply

- a. Financial educator (of adult clients)
- b. K-12 financial educator
- c. Social worker or other service provider (other than financial education)
- d. Credit counselor
- e. Housing counselor
- f. Financial coach

- g. Financial planner
- h. Program manager (non-front-line)
- i. Other, please specify

ORG. What best describes your organization? Select all that apply

- a. Financial institution
- b. Individual financial practitioner
- c. Faith-based organization
- d. Housing organization
- e. Credit Building organization
- f. Non-profit community development organization
- g. U.S. Federal government
- h. Local or state government
- i. College, University or Trade School
- j. K-12 school or program
- k. Other, please specify

SIZE. Approximately how many clients do you serve annually with financial education services?

- a. 25 or less
- b. 26 to 50
- c. 51 to 200
- d. 201 to 500
- e. More than 500

POP. Which of the following populations do you serve? Select all that apply

- a. Adults
- b. Children and youth
- c. Low income or economically vulnerable families and individuals
- d. Elderly
- e. Students
- f. Military service members or veterans

Industry Knowledge and Expertise

Thinking generally about the financial education information and research provided by CFPB, and using a scale from 1 to 10, where 1 is “Poor” and 10 is “Excellent,” please rate CFPB on the following:

[RANDOMIZE ORDER]

KNOW1 Serving as a trusted source of financial education information

KNOW2 Staying up-to-date on industry trends

KNOW3 Showing expertise on a variety of financial subjects

KNOW4 Providing research-based tools and guidance

KNOW5 Creating innovative ways of thinking about financial education (e.g., Financial Well-Being Scale)

Live Trainings and Events

EVTANMT. Do you receive announcements from CFPB on upcoming events?

- a. Yes
- b. No
- c. Don't know

EVENT. In the past year, which of the following training and informational events hosted by CFPB have you attended or participated in? Select all that apply

- a. Attended one or more monthly webinars
- b. Attended a CFPB presentation at a conference
- c. Visited a CFPB exhibit table at a conference
- d. Attended a CFPB hosted Conference or Regional Meeting
- e. None of the above **[SKIP TO NEXT SECTION]**

Think about the training and informational events hosted by CFPB that you've attended or participated in. Using a scale from 1 to 10, where 1 is “Poor” and 10 is “Excellent,” please rate CFPB on the following:

[RANDOMIZE ORDER]

EVNT1 Relevance of the topics covered in trainings

EVNT2 Frequency in which events are held

EVNT3 Usefulness of the events in helping you educate your clients

EVNT4 Timeliness of notification of upcoming events

EVNT5 Having knowledgeable speakers and presenters

EVNT6 Professionalism of event production

DOWNL. [ASK IF EVENT = A, B, or C] After attending an event, either online or in person, have you downloaded the event materials to share with your clients or use in your work?

- d. Yes
- e. No

Educational Materials and Resources

ACCESS. How have you accessed the educational materials and resources provided by CFPB in the past year?

- a. Ordered brochures and printed materials in bulk
- b. Accessed tools and information from the CFPB website at consumerfinance.gov to use with clients
- c. Both ordered in bulk and accessed online
- d. Neither

MATER. [ASK IF ACCESS = A, B or C] Which of the following educational materials and resources provided by CFPB have you used in the past year? Select all that apply

- a. Your Money Your Goals booklets and resources
- b. Materials designed for use with older adults
- c. Materials for use with service members -- Misadventures in Money Management financial education activities?
- d. Materials for Librarians
- e. Materials for K-12 Teachers
- f. None of the above **[SKIP TO NEXT SECTION]**

Think about the CFPB educational materials, publications, and resources you've used. Using a scale from 1 to 10, where 1 is "Poor" and 10 is "Excellent," please rate them on the following:

[RANDOMIZE ORDER]

MATER1 Relevance of the topics covered

MATER2 Usefulness of the information provided

MATER3 Ease of understanding the information provided

MATER4 Effectiveness in helping you educate your clients

MATER5 [ASK IF ACCESS = A or C] Ease of placing a bulk order

MATER6 [ASK IF ACCESS = A or C] Quality of printed materials

MATER7 [ASK IF ACCESS = A or C] Timeliness of order fulfillment

MATOPN. What have been the most useful applications of the CFPB materials and resources in educating your clients? **[Capture open-end]**

Website

WEBSITE. How frequently do you visit the CFPB website (www.consumerfinance.gov) for financial education information or materials?

- a. Weekly
- b. Monthly
- c. Every few months
- d. A couple times a year
- e. Never – it's been more than 12 months since I last visited **[SKIP TO NEXT SECTION]**

WRESRC. Which of the following resources on the CFPB website (www.consumerfinance.gov) have you used in the past year? Select all that apply

- a. Consumers tools and money topics
- b. Ask CFPB
- c. "Submit a complaint" tool
- d. Practitioner tools
- e. Adult Financial Education page If we include the url, its consumerfinance.gov/practitioner-resources/adult-financial-education/data and research
- f. On-line financial well-being scale ("find out your financial well-being")
- g. Other

Using a scale from 1 to 10, where 1 is "Poor" and 10 is "Excellent," please rate the CFPB online resources on the following:

WEB1 Relevance of the information on the website

WEB2 Ease of finding what you are looking for

WEB3 Usefulness of the resources and information on the website

WEB4 The look and feel of the website

WEBOPN. What could CFPB do to improve your satisfaction with the CFPB website (www.consumerfinance.gov)?

Customer Satisfaction Index

SATIS. Please think about your experiences with the CFPB Financial Education materials and resources overall. Using a scale where 1 means "Very dissatisfied" and 10 means "Very satisfied," how satisfied are you with CFPB FinEx? **(Do not allow for DK/NA)**

EXPECT. Using a scale where 1 now means "Falls short of your expectations" and 10 means "Exceeds your expectations," how do your experiences with the CFPB Financial Education materials and resources compare to your expectations? **(Do not allow for DK/NA)**

IDEAL. Now, imagine your ideal service for financial education resources. Using a scale where 1 means "Not very close to the ideal" and 10 means "Very close to the ideal," how do the CFPB Financial Education materials and resources compare to this ideal? **(Do not allow for DK/NA)**

Future Behaviors

RECOM. On a scale from 1 to 10, where 1 means “Not at all likely” and 10 means “Very likely,” how likely are you to recommend CFPB Financial Education materials resources to others?

CHANGE. Using a scale from 1 to 10, where 1 means “Not at all” and 10 means “A great deal,” to what extent has your experience with CFPB changed the way you serve and educate your clients?

Close

SUGGEST. What suggestions do you have for CFPB to improve your satisfaction with their financial education materials and resources? [**Capture open-end**]

Thank you for taking the time to complete this survey. Please click “finish” to submit your responses and exit the survey.