

## Consumer Financial Protection Bureau Financial Education Exchange Annual Survey

Greetings from the CFPB Financial Education Exchange (CFPB FinEx)! We are interested in getting your feedback on FinEx and on the Bureau's tools and resources for financial educators like you. To share your thoughts with us, please fill out this online survey:

[Insert Survey link here]

The goal of CFPB FinEx is to support financial educators in their work, so it is important to us to collect information on how you are using our tools and resources. If you would prefer to take the survey anonymously, please feel free to do so by not submitting your name, email address, and work address. If you provide your name, address, email and organization we will use this information to update our email list.

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 should take no longer than 30 minutes to complete. If you have any questions, please email us at [CFPB\\_FinEx@cfpb.org](mailto:CFPB_FinEx@cfpb.org). We greatly appreciate your feedback -- thank you for your participation!

### **Privacy Act Statement** **5 U.S.C. 552a(e)(3)**

The information you provide will assist the Consumer Financial Protection Bureau in improving the Bureau's tools and resources for financial educators.

The Consumer Financial Protection Bureau may collect personally identifiable information such as your name, organization, email address, phone number and work address.

Information collected will be treated in accordance with the System of Records Notice ("SORN"), CFPB.021 Consumer Education and Engagement Records, 83 FR 23435. This information will not be disclosed as outlined in the Routine Uses for the SORN. Direct identifying information will only be used to facilitate the survey 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.

Participation in this survey is voluntary.

### **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 Office of Management and Budget (OMB) control number. The OMB control number for this collection is 3170-0036. It expires on 8/31/2019. The time required to complete this information collection is estimated to average approximately 30 minutes per response. 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 the Consumer Financial Protection Bureau (Attention: PRA Office), 1700 G Street NW, Washington, DC 20552, or by email to [PRA\\_Comments@cfpb.gov](mailto:PRA_Comments@cfpb.gov).

1. Name \_\_\_\_\_ (responding to this question is optional)
2. Organization's name \_\_\_\_\_ (responding to this question is optional)
3. Work email address \_\_\_\_\_ (responding to this question is optional)
4. City/state \_\_\_\_\_ (responding to this question is optional)
5. Phone # \_\_\_\_\_
6. What is your role within the organization? (check all that apply)
  - \_\_\_ Provide financial education services to clients
  - \_\_\_ Provide other services to clients
  - \_\_\_ Program development
  - \_\_\_ Other (please describe)
7. What types of services does your organization provide overall? (check all that apply)
  - \_\_\_ Any type of financial education programming
  - \_\_\_ Social/human services
  - \_\_\_ Programs for children/youth
  - \_\_\_ Research/evaluation/policy analysis
  - \_\_\_ Training/technical assistance
  - \_\_\_ Funding
  - \_\_\_ Financial products and services
  - \_\_\_ Other (please describe) \_\_\_\_\_
8. What types of financial education does your organization currently provide? (check all that apply)
  - \_\_\_ Group financial education classes
  - \_\_\_ One-on-one financial counseling/coaching sessions
  - \_\_\_ Printed or online financial education materials
  - \_\_\_ Financial planning services
  - \_\_\_ Tax preparation services
  - \_\_\_ Public education campaigns
  - \_\_\_ Housing counseling
  - \_\_\_ Credit counseling
  - \_\_\_ Other (please describe)
9. Approximately how many clients do you serve annually with financial education services?

- 0-25  26-50  
 51-200  
 201-500  
 501+

10. Which of the following populations do you serve? (check all the apply)

- Adults  
 Children and youth  
 Low income/economically vulnerable  
 Older Americans  
 Students  
 Military servicemembers/veterans  
 Employees

11. Since signing up for CFPB FinEx, have you used any tools or resources from the Bureau in your financial education work?

- Yes  
 No

10(a). If no, is there anything we can do to make the tools and resources more accessible and useful? (text response)

12. If yes, which CFPB FinEx tools/resources have you used? (check all that apply)

- FinEx webinars  
 FinEx in-person regional meetings  
 Ordered or downloaded printed resources to distribute to clients  
 Financial Well-Being scale  
 Financial coaching reports  
 Managing spending resources  
 Credit score and report resources  
 Take Control of Your Auto Loan resources  
 Financial Rules to Live By report and worksheets  
 Financial Wellness at Work  
 Your Money Your Goals Toolkit  
 Tax-time savings resources  
 Buying a House online tools  
 Paying for College/Student Loan Repayment online tools  
 Planning for Retirement online tools  
 Money as You Grow/parent financial education resources  
 Building Blocks to Help Youth Build Financial Capability report and resources  
 Spanish-language resources  
 Libraries resources  
 Older Americans resources  
 LinkedIn financial education discussion group

13. Please explain how you have used the resources. (text response)

14. Has using the CFPB FinEx tools/resources in your financial education work done any of the following: (check all that apply)

- Changed how you interact with clients
- Added new elements to your financial education programming
- Changed existing programming
- Changed training/professional development of staff
- Changed the outcome metrics you collect on your program
- Other

(Please explain - text response)

15. Have you seen any changes from clients in any of the following areas from using the CFPB FinEx tools/resources in your financial education work? (check all that apply)

- Increased engagement in the program
- Change in attitudes about finances
- Changes in financial behavior
- Other

(Please explain - text response)

16. Can you share any examples of changes in clients, in terms of behavior, motivation, etc, related to their financial decision-making as a result of using FinEx tools/resources? (Please do not include any personally identifying information about your clients).

(Text response)

17. Have you tried anything new based on the CFPB FinEx tools/resources that did not have the intended effect? (Please explain - text response)

18. Based on the CFPB FinEx tools/resources that you've explored, do any approaches seem particularly promising to help consumers? (Please explain - text response)

19. More broadly, what are other promising new ideas, topics, or approaches in financial education that the CFPB FinEx community should explore? (Please explain - text response)

20. Would you recommend the CFPB FinEx tools/resources to other financial educators?

- Yes
- No