

Instrument 3B: Participant Training Post-Survey

*Thank you for completing this survey as part of our evaluation of this training on **Your Money, Your Goals: A financial empowerment toolkit for community volunteers** (henceforth “**Your Money, Your Goals**”). This information is being collected to help CFPB improve the **Your Money, Your Goals** materials. CFPB and its contractor will review responses to identify potential enhancements to the materials.*

Complete this survey providing short written responses and selecting from response options, as prompted by the survey questions. Please note that your responses will be kept private to the extent permitted by law and when survey results are reported none of your answers will be directly connected to you. Please see the Paperwork Reduction Act statement and Privacy Notice on the last page of this survey.

1) The organization sponsoring this delivery of the Consumer Financial Protection Bureau’s *Your Money, Your Goals: A financial empowerment toolkit for community volunteers* (henceforth “*Your Money, Your Goals*”):

2) Please check any of the following that describe the clients you work with.

Geography

- Mostly Urban
- Mostly Suburban
- Mostly Rural

Gender

- Mostly Female
- Mostly Male

3) After participating in this training, how well-prepared do you feel to use *Your Money, Your Goals* with your clients?

- Well-prepared
- Somewhat prepared
- Not prepared

4) 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.

	Strongly Agree	Agree	Disagree	Strongly Disagree
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"/>

<i>Your Money, Your Goals</i> will improve my ability to meet the needs of the people I serve.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel prepared to use the tools and resources in the <i>Your Money, Your Goals</i> toolkit with the people I serve.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I plan to use the tools and resources in <i>Your Money, Your Goals</i> with the people I serve.				

5) 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 the financial condition or situation of the people you serve?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Get help if you or other individuals 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 specialized help on financial topics to share with the people you serve?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Help individuals 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 volunteer work?	<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 website?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6) The *Your Money, Your Goals* 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
INTRODUCTION PART 1: Introduction to the toolkit				
Tool 1: Top money conversations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2: Financial empowerment checklist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
INTRODUCTION PART 2: Understanding the situation				
Tool 1: My money picture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
INTRODUCTION PART 3: Starting the conversation				
Content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
INTRODUCTION PART 4: Emotions, values, and culture: What's behind our money decisions?				
Content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MODULE 1: Setting goals and planning for large purchases				
Tool 1: Goal-setting tool	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2: Planning for life events and large purchases	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3: Buying a car	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MODULE 2: Saving for emergencies, goals, and bills				
Tool 1: Savings plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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"/>
MODULE 3: Tracking and managing income and benefits				
Tool 1: Income and financial resource tracker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2: Strategies for increasing cash and financial resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Very Useful	Useful	Somewhat Useful	Not at All Useful
Tool 3: Choosing how to receive income and benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4: Increasing your income through tax credits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MODULE 4: Paying bills and other expenses				
Tool 1: Spending tracker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2: Bill calendar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3: Choosing ways to pay bills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4: Strategies for cutting expenses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 5: When cash is short—prioritizing bills and spending	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MODULE 5: Getting through the month				
Tool 1: Cash flow budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2: Cash flow calendar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3: Improving cash flow checklist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MODULE 6: Dealing with debt				
Tool 1: Debt 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"/>
Tool 4: Student loan debt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 5: When debt collectors call	<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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2: Credit report review checklist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3: Improving credit reports and scores	<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				

	Very Useful	Useful	Somewhat Useful	Not at All Useful
Tool 1: Know your options: Understanding what you need	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 2: Ask questions: Choosing where to get what you want	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 3: Money services and banking basics	<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"/>
Tool 5: Remittances	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MODULE 9: Protecting your money				
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: Submitting a complaint to the CFPB	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tool 4: Learning more about consumer protection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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 3170-0038. It expires on 08/31/2016. 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 PRA@cfpb.gov.

Privacy Notice

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

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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.