**Financial Coaching Participant Post-Survey**

1. Do you have a checking or savings account?

☐No ☐Only Savings ☐Only Checking ☐Both

*Check the most appropriate box for each item.*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **IN THE LAST 3 MONTHS:** | **Never** | **1 time** | **2 times** | **3 times** | **4 times** | **5 times** | **6 times or more** |
| 1. How often did you use a check cashing store where you paid a fee to get cash in exchange for a check? |  |  |  |  |  |  |  |
| 1. How often did you obtain cash from a payday loan in anticipation of an upcoming pay check? |  |  |  |  |  |  |  |
| 1. How often did you pay a late fee on any bill? |  |  |  |  |  |  |  |

1. Which of the following statements best describes how you keep track of your income?

☐ I keep a written or online record of my income as it comes in.

☐ I have a general idea of my income, but do not keep a written record as it comes in.

☐ I do not keep track of my income.

1. Thinking about the past 3 months, how often was your income about the same from one month to the next?

☐ Always

☐ Usually

☐ Sometimes

☐ Rarely

☐ Never

*Check the most appropriate box for each item.*

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Yes, and I follow it** | **Yes, but I do not follow it** | **No** |
| 1. Do you have a monthly written budget or spending plan? |  |  |  |
| 1. Do you have a written financial plan to save for your or your family’s future or emergencies? |  |  |  |
| 1. Do you have a written debt-alleviation plan? |  |  |  |

1. Have you ever ordered your credit report? ☐Yes ☐No
2. Which of the following statements best describes the type of monthly payments you typically made during the last 3 months when you received your credit card bill(s):

☐ Less than the minimum amount that appeared on the bill

☐ The minimum amount that appeared on the bill

☐ More than the minimum amount, but less than the full balance

☐ The full balance/entire bill

☐ I do not have a credit card

1. In the last 3 months, would you say your household’s spending has been less than, more than, or about equal to your income? Please do not include large purchases such as a house or car.

☐Less than ☐More than ☐Equal to ☐Do not know

1. How much do you agree with the following statements?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Strongly Disagree** | **Disagree** | **Agree** | **Strongly Agree** | **Not Applicable** |
| 1. I feel in control of my finances. |  |  |  |  |  |
| 1. I know enough about budgeting and spending to teach my children about those things. |  |  |  |  |  |
| 1. I am confident in my ability to achieve a financial goal I set for myself. |  |  |  |  |  |
| 1. I feel prepared for a financial emergency such as job loss, car repair, etc. |  |  |  |  |  |
| 1. I am confident in my ability to read and understand my credit report. |  |  |  |  |  |
| 1. I know what to do to build and improve my credit. |  |  |  |  |  |
| 1. I feel financially prepared for the future. |  |  |  |  |  |

1. On a scale of 1 to 5 where 1 equals not at all satisfied and 5 equals completely satisfied, how satisfied are you with the following financial aspects of your life?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **1**  **Not at satisfied** | **2** | **3**  **Somewhat satisfied** | **4** | **5**  **Completely satisfied** |
| 1. Banking | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |
| 1. Budgeting | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |
| 1. Credit | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |
| 1. Debt | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |
| 1. Income | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |
| 1. Saving | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |

1. Using the definition you wrote on your intake form, how secure do you feel your financial situation is right now?

☐ Very secure

☐ Secure

☐ Somewhat secure

☐ Not very secure

☐ Not at all secure

1. Thinking back to before you started receiving one-on-one coaching services, how well do you think you understood the following topics on a scale of 1 to 5 where 1 equals not at all and 5 equals extremely well?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **1**  **Not at all** | **2**  **Not very well** | **3**  **Somewhat well** | **4**  **Well** | **5**  **Extremely Well** |
| 1. How to budget and manage your money | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |
| 1. How to improve or repair your credit | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |
| 1. How to make sound financial decisions | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |
| 1. How to generate additional income | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |

1. Since you started receiving one-on-one coaching services, how has your understanding of the following topics improved on a scale of 1 to 5 where 1 equals not at all improved and 5 equals improved very much?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **1**  **Not at all** | **2**  **Not very well** | **3**  **Somewhat well** | **4**  **Well** | **5**  **Extremely Well** |
| 1. How to budget and manage your money | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |
| 1. How to improve or repair your credit | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |
| 1. How to make sound financial decisions | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |
| 1. How to generate additional income | **⃝** | **⃝** | **⃝** | **⃝** | **⃝** |

1. To what extent were you successful in making progress toward reaching your 6-month goal?

☐ Completely Unsuccessful

☐ Somewhat Unsuccessful

☐ Somewhat Successful

☐ Completely Successful

1. If you made some progress toward reaching your 6-month goal, what part of the program best helped you do this?

|  |
| --- |
|  |

1. How much do you estimate you and your spouse/partner have in total:

|  |  |
| --- | --- |
| **a. Debts (exclude mortgages)** | **b. Savings** |
| ☐None | ☐None |
| ☐$1-$1,500 | ☐$1-$1,500 |
| ☐$1,501-$3,000 | ☐$1,501-$3,000 |
| ☐$3,001-$4,500 | ☐$3,001-$4,500 |
| ☐$4,501-$6,000 | ☐$4,501-$6,000 |
| ☐$6,001-$7,500 | ☐$6,001-$7,500 |
| ☐$7,501-$10,000 | ☐$7,501-$10,000 |
| ☐More than $10,000 | ☐More than $10,000 |
| ☐Don’t know | ☐Don’t know |

1. What is your annual income (*optional*)?

|  |  |  |  |
| --- | --- | --- | --- |
| ☐ $0-$10,000 | ☐ $40,001-$50,000 | ☐ $80,001-$90,000 | ☐ >$120,000 |
| ☐ $10,001-$20,000 | ☐ $50,001-$60,000 | ☐ $90,001-$100,000 |  |
| ☐ $20,001-$30,000 | ☐ $60,001-$70,000 | ☐ $100,001-$110,000 |  |
| ☐ $30,001-$40,000 | ☐ $70,001-$80,000 | ☐ $110,001-$120,000 |  |

**Program and Coach Evaluation:**

*Your responses on this questionnaire are confidential and for program improvement use only. Coaches* ***will not*** *see your responses.*

1. Please rate your level of agreement with the following statements about your experience with your financial coach.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **My Coach:** | **Strongly Disagree** | **Disagree** | **Agree** | **Strongly Agree** |
| 1. Was patient |  |  |  |  |
| 1. Was supportive |  |  |  |  |
| 1. Was encouraging |  |  |  |  |
| 1. Met with me (whether face-to-face or over the phone) to discuss my progress often enough |  |  |  |  |
| 1. Allowed me to decide what financial goal(s) we would work on together |  |  |  |  |
| 1. Helped me form a realistic financial goal |  |  |  |  |
| 1. Helped me stay on track to reach my goal(s) |  |  |  |  |
| 1. Had the knowledge she/he needed to help me achieve my financial goal(s) |  |  |  |  |
| 1. Provided me the resources I needed to reach my financial goal(s) |  |  |  |  |

1. Overall, considering everything, how would you rate the quality and effectiveness of the one-on-one coaching services you received?

☐Excellent

☐Very Good

☐Fair

☐Poor

1. If you knew someone who was in a situation similar to yours, how likely would you be to recommend the coaching services?

☐Definitely would recommend coaching services

☐Probably would recommend coaching services

☐Probably would not recommend coaching services

☐Definitely would not recommend coaching services

1. What – if anything – do you wish your coach had done differently?

|  |
| --- |
|  |

1. What do you recommend we do to improve the financial coaching program?
2. Please describe the changes you have made in your financial behavior as a result of your participation in this program?

**Contact Information**

1. Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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