

# DEVELOPING BOTH EFFECTIVE AND EFFICIENT FINANCIAL LITERACY PROGRAMS

**Michelle Coussens**

## PROGRAM SURVEY

### Questions

What is the official title of your program?

---

- 1) What are the major topics that your program covers?
- 2) How many full-time staff members are there in your organization? About how many of them work full-time on this program? Do you have volunteers also working on the program? If so, about how many of them work full-time on this program?
- 3) Who are your primary clients? (for example, are they students, people in financial trouble, members of an organization such as a church or community group, or employees in a workplace, etc?)
- 4) Is the aim of the program to prevent problems with your clients' personal finances or to help correct problems that your clients already have, or both?
- 5) What do you consider to be the primary benefits of the program to your clients? Who benefits in addition to the attendees? Are there other organizations or businesses that benefit? How do you think the economy is impacted?
- 6) What is the total annual budget (expenditure) of your organization? What is the total annual budget for this program? Where did the initial funding for this program come from?
- 7) What fee, if any, does a client pay to participate in your program?
- 8) What is the nature of your organization—is it non-profit? Government agency? Financial institution? Educational institution? A business? Other??)
- 9) Who were your partners in developing this program? Who are your partners in executing and maintaining the program? Are there any other stakeholders who have special interests in the program?
- 10) What costs have been invested in starting the program? What costs have been incurred in maintaining it? Has a cost/benefit analysis been done to determine the program's economic impact/success?
- 11) Do you seek to train the consumer directly, do you "train the trainer" (i.e. provide training to educators etc.), or do you do both?
- 12) Who is responsible for the training? (professionals, volunteers, etc.)

- 13) Where does training take place? For instance, is it in the workplace, at schools? Are there multiple types of locations/venues? Please describe.
- 14) How is the program taught? For instance, is it taught via the Internet, over the phone, in a classroom, via other self-study materials, etc? Are multiple ways to teach the material used, and if so, how?
- 15) How are participants recruited? Is the program advertised? If so, how? How do participants find out about it?
- 16) Do you have a target age range for your clients?
- 17) Are there characteristics that your clients share, such as where they live or their income level?
- 18) What data do you collect about program participants (before, during and after the program)? Do you collect any information about people who are eligible for the program but who do not participate?
- 19) How many people have completed your program? If you “train the trainers”, are you able to tell how many consumers have been impacted?
- 20) Has the program been reviewed for effectiveness? If so, how often? Who has been involved in that review? What has the program review revealed about the strengths/weaknesses of the program?
- 21) Do you have any informal or anecdotal evidence that speaks to the effectiveness of the program?
- 22) What would you like to improve about your the program?
- 23) What else do you think we should know about the program?
- 24) Do you have information about your program you could send us? Are there other materials you would recommend us to review?
- 25) Do you know of any other financial literacy programs that you think we should know about? Do you have contact information for them?
- 26) Do you have any questions about the Michelle’s project? If so, I will pass them along to her and be sure that one of us responds to you.
- 27) Would you be interested in potentially working with the Chicago Fed on a financial literacy pilot program?

Would you provide your contact information?

**Email address:** \_\_\_\_\_  
**Work Title:** \_\_\_\_\_  
**Work Address:** \_\_\_\_\_  
**Work Phone Number:** \_\_\_\_\_  
**Work web site address:** \_\_\_\_\_

Are there any other people at your organization to should include on the Chicago Fed’s list of contacts?

**Name:** \_\_\_\_\_  
**Title:** \_\_\_\_\_  
**Email Address:** \_\_\_\_\_  
**Phone Number:** \_\_\_\_\_