Financial Management Evaluation

Three Months Later Survey - by phone (or mail, if necessary)

This survey is designed to be filled out after the workshop series has been completed. The questions are designed to be used in a phone survey format. If a phone survey is impractical, then the questions can be used in a written survey and mailed to workshop participants.

I'm calling only hoping that you can answer some questions. It will only take a few minutes. Will you help me answering these questions? Thank you.

After completing the __________________ program

1. Did you develop a budget that you did not have before the program?
   ______ Yes ______ No (go to question 3)
   ______ Already had one (go to question 3)

2. Do you follow the household budget?
   ______ Always ______ Often ______ Sometimes ______ Rarely ______ Never

3. Did you develop a spending plan that you did not have before the program?
   ______ No ______ (go to question 4)
   ______ Already had one (go to question 4)

4. Do you keep a written record of expenses?
   ______ Always ______ Often ______ Sometimes ______ Rarely ______ Never

5. Did you develop a savings plan that you did not have before the program?
   ______ Yes ______ (go to question 5)
   ______ Already had one (go to question 5)

6. Have you increased your monthly savings?
   ______ Yes ______ (at least $10 per mo. ______ $11 - 49 per mo. ______ $50 - 99 per mo. ______ $100 or more)
   ______ No

7. Did you open a savings account that you did not have before the program?
   ______ Yes ______ (go to question 7)
   ______ Already had one (go to question 7)

8. Have you increased your monthly savings?
   ______ Yes ______ (at least $10 per mo. ______ $11 - 49 per mo. ______ $50 - 99 per mo. ______ $100 or more)
   ______ No

9. Did you make a saving account that you did not have before the program?
   ______ Yes ______ (go to question 9)
   ______ Already had one (go to question 9)
8. How much have you saved so far?
   $_______

9. Did you review one or more insurance policies that you did not review before the program?
   ____ Yes ______ No (go to question 11)

10. Did you or a family member cancel one or more policies no longer needed?
     ____ Yes ______ No

11. Did you or a family member add new policies needed?
     ____ Yes ______ No 

12. Did you make any changes in your insurance?
     ____ Change insurance companies to save premium while maintaining coverage $_______

     ____ Cancelled policies no longer needed
     ____ Added policies needed
     ____ Other: _____________________________________________

13. Did you pay bills on time that you did not pay on time before the program?
     ____ Always ______ Often ______ Sometimes ______ Rarely ______ Never

14. Did you write or have a will written that you did not have before the program?
     ____ Yes (go to question 14) ______ No (go to question 13)

15. Did you prepare a net worth statement that you did not have before the program?
     ____ Yes ______ No

16. Did you develop a household inventory that you did not develop before the program?
     ____ Yes ______ No

17. Have you been able to lower the amount of debt you owe using any of the tips you learned in the program?
     ____ Yes ______ No

18. Have you been able to lower your monthly expenses using any of the tips you learned in the program?
     ____ Yes ______ No

19. Have you been able to improve your credit rating (score) using any of the tips you learned in the program?
     ____ Yes ______ No

20. Is there anything else that you want us to know about how the training has affected your life?
     (Write narrative statement and thank them for their time)

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