



Tool: Conduct a Survey (example)

A survey can be used to inform decision makers of the interests and opinions of constituents or a community. It may also better inform you on the main concerns of people in your area.

Example Survey

Demographics

1. What is your gender?
 - a. Male
 - b. Female
 - c. Prefer not to disclose

2. What is your age?
 - a. 18-24
 - b. 25-39
 - c. 40-60
 - d. 60+

Awareness

3. How familiar are you with financial education?
 - a. Extremely familiar
 - b. Very familiar
 - c. Moderately familiar
 - d. Slightly familiar
 - e. Not at all familiar

4. Do you agree with the following statements?

“There is a large demand from parents and students to have financial education in the classroom.”

 - a. Strongly agree
 - b. Agree
 - c. Not sure
 - d. Disagree
 - e. Strongly disagree

“Financial education needs to be a priority in schools.”

 - a. Strongly agree
 - b. Agree
 - c. Not sure
 - d. Disagree
 - e. Strongly disagree



Influence

5. Who do you think has the most influence to get financial education implemented in your *school*?
 - a. State-level policy makers
 - b. District-level policy makers
 - c. School administration
 - d. Teachers
 - e. Parents
 - f. Students

Resources

- The National Endowment for Financial Education has created an [evaluation toolkit](#) that is free online and includes a large bank of questions that can be used to create a survey for youth and adults.
- [Qualtrics](#) offers some common sense tips to create a survey.
- Check out these three simple [questions](#) that research has used worldwide to predict financial literacy.
- There are many surveys available on financial literacy and capability that you can use. One great example is the [National Financial Capability Study](#). Use some of the questions from this survey to compare how your community does with the national average.