

Attachment #1: Smart Investing Customer Training Pre-Evaluation

SMART INVESTING: WHERE ARE YOU NOW?

Please take a few minutes to complete this survey and help to evaluate the effectiveness of the Smart Investing online training.

Your responses are confidential and only aggregated (grouped) results will be shared. As this is a pre evaluation, please refrain from looking up answers to the questions. We need honest responses.

Background

Which library is offering the Smart Investing training? (Include city and state)

How did you hear about the Smart Investing program? (Check all that apply)

- Flyer/poster
- Newspaper article
- Brochure/bookmark
- Newsletter
- Library staff
- Local business or organization
- Friend/family
- Other (Please specify: _____)

What online curriculum best fits your interest level that you plan to participate in:

- Young Adults (age 20 – 40)/Starting Out: Establishing an Investment Plan
- Pre-Retirees/Building Up: Fine-tuning your Portfolio & Planning for Retirement
- Retirees/Making it Last: Retiring & Retirees

PART 1 – Please answer each of the following questions

How would you rate your knowledge on the following topics: (Mark one for each line)

	Not at all knowledgeable	Not very knowledgeable	Somewhat knowledgeable	Knowledgeable	Very knowledgeable
1. Money management	<input type="checkbox"/>				
2. Investments	<input type="checkbox"/>				
3. Retirement planning	<input type="checkbox"/>				
4. Estate planning	<input type="checkbox"/>				

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How confident are you in your ability to... (Mark one for each line)

	Not at all confident	Not very confident	Somewhat confident	Confident	Very confident
1. Develop a financial plan	<input type="checkbox"/>				
2. Manage your money	<input type="checkbox"/>				
3. Invest your money	<input type="checkbox"/>				
4. Plan for retirement	<input type="checkbox"/>				
5. Create an estate plan	<input type="checkbox"/>				
6. Find reliable resources (books, databases, websites) on personal finance and/or investing	<input type="checkbox"/>				

PART 2 – Please answer each of the following questions

- A growth mutual fund would be an excellent way to save for short-term goals.

True

False

Don't know/not sure
- The goal of an asset allocation plan is to build an investment portfolio that includes investments that _____.

react differently to the same market forces

react in similar ways to the same market forces

avoid market risk

Don't know/not sure
- Suppose your asset allocation plan is to have 50% in stocks, 30% in bonds, and 20% in cash. If stock prices drop dramatically, in order to rebalance your portfolio, you will _____.

buy stock

sell stock

buy bonds

Don't know/not sure
- A Section 529 Plan is a tax-advantaged way to save for _____.

college

retirement

long-term health care

Don't know/not sure

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5. Which of the following is true about a Roth IRA?
- Contributions are made with “before-tax” earnings
 - Withdrawals during retirement are taxed
 - You are not required to withdraw your money at any age
 - Don't know/not sure
6. If you have tried unsuccessfully to resolve a problem with a brokerage firm, you should contact the _____.
- Nebraska Bar Association
 - Nebraska Department of Banking and Finance
 - Nebraska Department of Economic Development
 - Don't know/not sure

About you

My age is:

- 24 and under
- 25 – 34
- 35 – 44
- 45 – 54
- 55 – 64
- 65 – 74
- 75 and over

My gender is:

- Male
- Female

My highest level of education is:

- Less than high school
- High school diploma/GED
- Some college
- Associate's degree
- Bachelor's degree
- Graduate degree

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Please create a personal code. This will help us compare before and after responses of participants to evaluate the results of the Smart Investing training. This code will not be used to identify you as an individual. Enter your FIRST NAME and HOUSE ADDRESS NUMBER or P.O. BOX NUMBER.

Example: Becky Johnson, address 1234 Peach Street

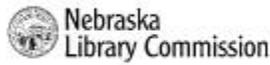
FIRST name	House Address number or P.O. Box number
Becky	1234

Please complete your unique code by following the pattern in the example above:

FIRST name	House Address number or P.O. Box number

*Thank you for taking the time to complete this survey.
Comments and questions regarding this survey may be directed to:
Kathryn Brockmeier, kathryn.brockmeier@nebraska.gov or 402-471-4002.*

This program, administered by the Nebraska Library Commission and the Northeast Library System, is made possible by a grant from the FINRA Investor Education Foundation through Smart Investing@your library®, a partnership with the American Library Association.



SMART INVESTING: WHERE ARE YOU NOW?

Please take a few minutes to complete this follow-up survey and help to evaluate the effectiveness of the Smart Investing online training.

Your responses are confidential and only aggregated (grouped) results will be shared.

As this is a post evaluation, please refrain from looking up answers to the questions. We need honest responses.

Background

Which library is offering the Smart Investing training? (Include city and state)

What online curriculum did you participate in?

____ Young Adults (age 20 – 40)/Starting Out: Establishing an Investment Plan

____ Pre-Retirees/Building Up: Fine-tuning your Portfolio & Planning for Retirement

____ Retirees/Making it Last: Retiring & Retirees

PART 1 – Please answer each of the following questions

How would you rate your knowledge on the following topics: (Mark one for each line)

	Not at all knowledgeable	Not very knowledgeable	Somewhat knowledgeable	Knowledgeable	Very knowledgeable
1. Money management	<input type="checkbox"/>				
2. Investments	<input type="checkbox"/>				
3. Retirement planning	<input type="checkbox"/>				
4. Estate planning	<input type="checkbox"/>				

How confident are you in your ability to... (Mark one for each line)

	Not at all confident	Not very confident	Somewhat confident	Confident	Very confident
1. Develop a financial plan	<input type="checkbox"/>				
2. Manage your money	<input type="checkbox"/>				
3. Invest your money	<input type="checkbox"/>				
4. Plan for retirement	<input type="checkbox"/>				
5. Create an estate plan	<input type="checkbox"/>				
6. Find reliable resources (books, databases, websites) on personal finance and/or investing	<input type="checkbox"/>				

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PART 2 – Please answer each of the following questions

1. A growth mutual fund would be an excellent way to save for short-term goals.
 True
 False
 Don't know/not sure

2. The goal of an asset allocation plan is to build an investment portfolio that includes investments that _____.
 react differently to the same market forces
 react in similar ways to the same market forces
 avoid market risk
 Don't know/not sure

3. Suppose your asset allocation plan is to have 50% in stocks, 30% in bonds, and 20% in cash. If stock prices drop dramatically, in order to rebalance your portfolio, you will _____.
 buy stock
 sell stock
 buy bonds
 Don't know/not sure

4. A Section 529 Plan is a tax-advantaged way to save for _____.
 college
 retirement
 long-term health care
 Don't know/not sure

5. Which of the following is true about a Roth IRA?
 Contributions are made with "before-tax" earnings
 Withdrawals during retirement are taxed
 You are not required to withdraw your money at any age
 Don't know/not sure

6. If you have tried unsuccessfully to resolve a problem with a brokerage firm, you should contact the _____.
 Nebraska Bar Association
 Nebraska Department of Banking and Finance
 Nebraska Department of Economic Development
 Don't know/not sure

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PART 3 – Please answer each of the following questions

As a result of participating in the Smart Investing training: (Mark one for each line)

	I already knew this information	I learned more information about this	I didn't learn this information
1. I understand how my investment time frame for my long-term goals impacts how I might invest my money.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I understand which investment categories would be consistent with my goals and risk tolerance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I understand how to monitor the performance of my investments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

As a result of participating in the Smart Investing training: (Mark one for each line)

	Yes	Maybe	No	Already doing this (since training started)	Already doing this (before training started)
1. I plan to assess the adequacy of my savings to meet a financial emergency.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I plan to develop an investment philosophy and assess my tolerance for taking risks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I plan to do a "ballpark estimate" of retirement savings needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I will make a point to use finance and investing resources from the library and/or online.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I plan to discuss investing with other family members and/or financial professionals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please rate the following training components: (Mark one for each line)

	Excellent	Good	Fair	Poor	Don't recall	Did not use
1. Educational content presented	<input type="checkbox"/>					
2. Online format of training modules	<input type="checkbox"/>					
3. Length of time to complete training	<input type="checkbox"/>					
4. Binder of materials prepared to accompany the online curriculum	<input type="checkbox"/>					
5. Money and Investing web page on NebraskAccess, nebraskaccess.ne.gov/moneyandinvesting.asp	<input type="checkbox"/>					
6. Communication/e-mails from or with instructor(s)	<input type="checkbox"/>					
7. Overall program	<input type="checkbox"/>					

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Additional comments about the training components:

About you

My age is:

- 24 and under 55 – 64
 25 – 34 65 – 74
 35 – 44 75 and over
 45 – 54

My gender is:

- Male Female

My highest level of education is:

- Less than high school
 High school diploma/GED
 Some college
 Associate's degree
 Bachelor's degree
 Graduate degree

Please create a personal code. This will help us compare before and after responses of participants to evaluate the results of the Smart Investing training. This code will not be used to identify you as an individual. Enter your **FIRST NAME** and **STREET** or **P.O. BOX NUMBER**.

Example: Becky Johnson, address 1234 Peach Street

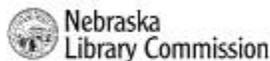
FIRST name	Street or P.O. Box number
Becky	1234

Please complete your unique code by following the pattern in the example above:

FIRST name	Street or P.O. Box number

Thank you for taking the time to complete this survey. Comments and questions regarding this survey may be directed to: Kathryn Brockmeier, kathryn.brockmeier@nebraska.gov or 402-471-4002.

This program, administered by the Nebraska Library Commission and the Northeast Library System, is made possible by a grant from the FINRA Investor Education Foundation through Smart Investing@your library[®], a partnership with the American Library Association.



Smart Investing@Your Library[®] Builds Nebraska Communities

COMMENT CARD

Name of the book or resource: _____

Circle the best answer for the following questions:

How useful is this resource for you?

- a. Very useful
- b. Somewhat useful
- c. Useful
- d. Not very useful
- e. Not at all useful

OVER PLEASE

How likely are you to apply what you learned
from this book/resource?

- a. Very likely
- b. Somewhat likely
- c. Likely
- d. Not very likely
- e. Not at all likely
- f. I didn't learn anything new

Would you recommend this
book/resource to family or friends?

- a. Yes
- b. No

Thank you for your
feedback. Please leave
this comment card at
the library front desk.



Nebraska
Library Commission



This program is made possible by a grant from the FINRA Investor Education Foundation through Smart Investing@your library[®], a partnership with the American Library Association. This program is sponsored by the Nebraska Library Commission and Northeast Library System.

SMART INVESTING: Marketing Survey

Dear Smart Investing Librarians,

To evaluate the marketing aspects of the Smart Investing training at the 22 participating libraries, please take a few minutes to complete this marketing survey.

1. What outreach strategies did you use to get the word out about your Smart Investing Training? (check all that apply)

- Speaking engagements
- Interview Shows
- Announcements at other meetings, community events
- Other (please specify) _____

2. What media/communication outlets (paid or unpaid) did you use to get the word out about the Smart Investing Training? (check all that apply)

- Newspaper
- Magazine
- Radio
- TV
- Library Newsletter
- Other organization's newsletter
- Other (please specify) _____

3. What did you do on-site at your library (both inside and outside the building) to promote the Smart Investing training? (check all that apply)

- Displays
- Posters
- Flyers
- Tent Cards
- Bookmarks
- Vinyl Banner
- Other (please specify) _____

4. What did you do at other locations within your market area to promote the Smart Investing training? (check all that apply)

- Displays
- Posters
- Flyers
- Bookmarks
- Other (please specify) _____

5. Indicate where these off-site promotions were used? (check all that apply)

- Retail Stores
- Other Business Offices
- City Offices
- Churches
- Chamber of Commerce
- Educational Institutions
- Senior Centers
- Service Organizations
- Other (please specify) _____

6. What online and social networking avenues did you use to get the word out? (check all that apply)

- Library Website
- Organization/Partner Website
- Community Calendar
- Facebook
- Twitter
- YouTube
- Other (please specify) _____

7. What other communication strategies did you use to get the word out? (check all that apply)

- Bill inserts
- Library Email blasts
- Other organization Email blasts
- Letters
- Phone calls
- Flyers/handouts
- Specialty handouts, i.e., giveaway items, etc.
- Other (please specify) _____

8. How effective was your marketing in getting the word out about your training:

Not at all effective	Not very effective	Somewhat effective	Effective	Very effective
<input type="checkbox"/>				

9. I would like to continue participating in promoting the “online” training modules for customers.

____ Yes
____ No

10. I would like to have another opportunity to offer the Smart Investing training facilitated by a trainer at our library.

____ Yes
____ No

11. I would like to have the online/webinar training on financial resources offered again to our library staff.

____ Yes
____ No

12. Please include your name and the name of your library:

*Thank you for taking the time to complete this survey.
Comments and questions regarding this survey may be directed to:
JoAnn McManus, joann.mcmanus@nebraska.gov or 402-471-4870.*

Appendix 1:

Source: Smart Investing Customer Training Pre- and Post-Evaluations

The following numbers are from the 108 Matched Sets

Percentage that Rated their Knowledge One or More Levels higher Post training than they did in their Pre-Evaluation (One Chart)

How would you rate your knowledge on the following topics:	Number of 108 matched respondents that rated topic less than "Very Knowledgeable" in Pre-Evaluation	Number Increasing by 1 or more levels	Percent Increasing by 1 or more levels	Number Increasing by 2 or more levels	Percent Increasing by 2 or more levels
Money management	105	28	26.7%	3	2.9%
Investments	107	53	49.5%	16	15.0%
Retirement Planning	107	59	55.1%	19	17.8%
Estate Planning	106	51	48.1%	20	18.9%

Percentage that Rated their Confidence One or more Levels higher Post training than they did in their Pre-Evaluation (One Chart)

How confident are you in your ability to:	Number of 108 matched respondents that rated confidence level less than "Very Confident" in Pre-Evaluation	Number Increasing by 1 or more levels	Percent Increasing by 1 or more levels	Number Increasing by 2 or more levels	Percent Increasing by 2 or more levels
Develop a financial plan	107	61	57.0%	12	11.2%
Manage your money	99	44	44.4%	9	9.1%
Invest your money	106	69	65.1%	17	16.0%
Plan for retirement	105	63	60.0%	17	16.2%
Create an estate plan	108	57	52.8%	19	17.6%
Find reliable financial resources	102	70	68.6%	26	25.5%

Percentage that Answered Knowledge-Based Questions Correctly After Answering them Incorrectly in the Pre-Evaluation (One Chart)

Topic of Six Knowledge-Based Questions	# who incorrectly answered question in Pre-Evaluation	Of these, # who answered it correctly in Post-Evaluation	Percentage of those who answered correctly in Post-Evaluation after answering it incorrectly in Pre-Evaluation
Short-term goal Investment Question	45	29	64.4%
Asset allocation plan Question	62	38	61.3%
Rebalancing portfolio Question	71	34	47.9%
Section 529 Plan Question	53	52	98.1%
Roth IRA feature Question	74	51	68.9%
State Regulatory Agency Question	42	32	76.2%

Source: Smart Investing Customer Training Pre- and Post-Evaluations

The following numbers are from the 224 Pre-Evaluations & 118 Post-Evaluations

Comparing all Pre- and Post-Evaluations: How Respondents Rated their Knowledge in Financial Topic Areas (One Chart)

How would you rate your knowledge on the following topics:	PRE-EVALUATION					TOTAL	Average Value	POST-EVALUATION					TOTAL	Average Value	Increase in Average Value	Percent Increase in Average Value
	Not at All knowledgeable (1)	Not very knowledgeable (2)	Somewhat knowledgeable (3)	Knowledgeable (4)	Very Knowledgeable (5)			Not at All knowledgeable (1)	Not very knowledgeable (2)	Somewhat knowledgeable (3)	Knowledgeable (4)	Very Knowledgeable (5)				
Money management	7	20	114	74	8	223	3.3	2	4	43	57	12	118	3.6	0.4	11.3%
Investments	35	73	86	26	3	223	2.5	2	16	59	39	2	118	3.2	0.7	27.7%
Retirement Planning	29	83	78	28	4	222	2.5	2	13	58	43	2	118	3.3	0.7	28.8%
Estate Planning	76	83	49	11	4	223	2.0	13	38	47	17	3	118	2.7	0.6	30.6%
Answer Value	(1)	(2)	(3)	(4)	(5)			(1)	(2)	(3)	(4)	(5)				

Comparing all Pre- and Post-Evaluations: How Respondents Rated their Confidence in the Ability in Financial-Related Activities (One Chart)

How confident are you in your ability to:	PRE-EVALUATION					TOTAL	Average Value	POST-EVALUATION					TOTAL	Average Value	Increase in Average Value	Percent Increase in Average Value
	Not at All Confident (1)	Not very Confident (2)	Somewhat Confident (3)	Confident (4)	Very Confident (5)			Not at All Confident (1)	Not very Confident (2)	Somewhat Confident (3)	Confident (4)	Very Confident (5)				
Develop a financial plan	19	59	93	43	6	220	2.8	3	6	46	54	9	118	3.5	0.7	24.9%
Manage your Money	5	29	91	77	18	220	3.3	2	4	25	68	18	117	3.8	0.5	14.5%
Invest your Money	36	84	66	27	7	220	2.5	2	13	57	43	3	118	3.3	0.8	32.0%
Plan for Retirement	28	84	70	29	8	219	2.6	4	14	48	45	7	118	3.3	0.7	29.1%
Create an estate plan	70	88	43	15	4	220	2.1	11	34	51	19	2	117	2.7	0.6	31.4%
Find reliable financial resources	15	44	76	60	22	217	3.1	1	6	24	52	35	118	4.0	0.8	26.4%
Answer Value	(1)	(2)	(3)	(4)	(5)			(1)	(2)	(3)	(4)	(5)				

Knowledge-Based Questions Results Comparing all Pre- and Post-Evaluations Chart:

Knowledge Questions	PRE-EVALUATION					Total	Percent Correct	POST-EVALUATION					Total	Percent Correct	Percent Improved
	Correct Answer	Incorrect Answer #1	Incorrect Answer #2	Don't Know/ Not Sure				Correct Answer	Incorrect Answer #1	Incorrect Answer #2	Don't Know/ Not Sure				
A growth mutual fund would be an excellent way to save for short-term goals.	116	26		77		219	53.0%	95	15		8	118	80.5%	52.0%	
The goal of an asset allocation plan is to build an investment portfolio that includes investments that:	84	12	38	85		219	38.4%	85	8	16	9	118	72.0%	87.8%	
Suppose your asset allocation plan is to have 50% in stocks, 30% in bonds, and 20% in cash. If stock prices drop dramatically, in order to rebalance your portfolio, you will:	67	12	46	93		218	30.7%	72	8	17	21	118	61.0%	98.5%	
A Section 529 Plan is a tax-advantaged way to save for:	106	12	7	94		219	48.4%	117	0	0	1	118	99.2%	104.9%	
Which of the following is true about a Roth IRA?	58	90	24	50		222	26.1%	91	15	7	4	117	77.8%	197.7%	
If you have tried unsuccessfully to resolve a problem with a brokerage firm, you should contact the:	121	4	5	92		222	54.5%	106	0	2	10	118	89.8%	64.8%	
TOTALS -- ALL 6 QUESTIONS TOGETHER	552	156	120	491		1319	41.8%	566	46	42	53	707	80.1%	91.7%	

Source: Smart Investing Customer Training Post-Evaluations
 The following numbers are from the 118 Post-Evaluations

As a result of the training, I understand... (Three Charts)

As a result of participating in the Smart Investing Training I understand:	Number answering the Question	I learned more about this	Percent of Total	I already knew this information	Percent of Total	I didn't learn this information	Percent of Total
How my investment time frame for my long-term goals impacts how I might invest my money	118	98	83.1%	15	12.7%	5	4.2%
Which investment categories would be consistent with my goals and risk tolerance	118	105	89.0%	7	5.9%	6	5.1%
How to monitor the performance of my investments.	118	100	84.7%	9	7.6%	9	7.6%

I plan to/I will make a point to... (Five Charts)

As a result of participating in the Smart Investing Training:	Yes	Maybe	No	Already doing this (since training started)	Already doing this (before training started)	TOTAL	% Who have already Taken Action as result of training	% Who have or will take Action as result of training	% Who have, will or may take Action as result of training
I plan to assess the adequacy of my savings to meet a financial emergency.	49	9	3	17	40	118	14.4%	55.9%	63.6%
I plan to develop an investment philosophy and assess my tolerance for taking risks.	48	16	5	22	26	117	18.8%	59.8%	73.5%
I plan to do a "ballpark estimate" of retirement savings needs.	52	24	8	18	16	118	15.3%	59.3%	79.7%
I will make a point to use finance and investing resources from the library and/or online.	79	17	1	8	13	118	6.8%	73.7%	88.1%
I plan to discuss investing with other family members and/or financial professionals.	66	15	1	12	24	118	10.2%	66.1%	78.8%

Training Component Ratings (Binder, Content, Overall, Communication, Online Format, NebraskAccess, Length of Time plus Ratings Combined on Single Chart) (Eight Charts)

Please rate the following training components:	Excellent	Good	Fair	Poor	Don't Recall	Did not use	Total who provided ranking	Average Value (4 Excellent & 1 Poor)	Total who answered
	Educational content presented	66	47	2	0	0	3	115	
Online format of training modules	48	56	8	0	0	6	112		118
Length of time to complete training	26	56	31	3	0	2	116		118
Binder of materials to accompany online curriculum	72	38	3	0	0	4	113		117
Money and investing web page on NebraskAccess	36	48	6	0	8	19	90		117
Communication/emails from or with instructor	43	44	5	0	1	22	92		115
Overall Program	60	49	3	0	0	2	112		114
Answer Value	(4)	(3)	(2)	(1)			Total	Avg Score	
Educational content presented	264	141	4	0			409	3.56	
Online format of training modules	192	168	16	0			376	3.36	
Length of time to complete training	104	168	62	3			337	2.91	
Binder of materials	288	114	6	0			408	3.61	
Money web page on NebraskAccess	144	144	12	0			300	3.33	
Communication/emails from or with instructor	172	132	10	0			314	3.41	
Overall Program	240	147	6	0			393	3.51	
% that ranked in these categories							Total		
Educational content presented	57.4%	40.9%	1.7%	0.0%			100.0%		
Online format of training modules	42.9%	50.0%	7.1%	0.0%			100.0%		
Length of time to complete training	22.4%	48.3%	26.7%	2.6%			100.0%		
Binder of materials	63.7%	33.6%	2.7%	0.0%			100.0%		
Money web page on NebraskAccess	40.0%	53.3%	6.7%	0.0%			100.0%		
Communication/emails from or with instructor	46.7%	47.8%	5.4%	0.0%			100.0%		
Overall Program	53.6%	43.8%	2.7%	0.0%			100.0%		

Post It Activity at Wrap-Up Sessions

What did you enjoy most or find the most useful?

Binder (made up of Instructions/Outlines/Readings)	31	15.3%
Gaining New Knowledge	26	12.8%
Online/At Home	19	9.4%
Websites to Financial information/tools	18	8.9%
Library Resources	15	7.4%
Quizzes/Worksheets	15	7.4%
Organized/Variety	13	6.4%
Lectures/PowerPoints	12	5.9%
Discussion	11	5.4%
Explanations	10	4.9%
Videos	9	4.4%
Readings	8	3.9%
Other	16	7.9%

What could be improved?

More time	24	27.6%
Meet more times	11	12.6%
More discussion	10	11.5%
Update videos/materials	7	8.0%
Simplify it	7	8.0%
Everything good as is	6	6.9%
Make it less repetitive	6	6.9%
Less reading	6	6.9%
Misc thoughts	10	11.5%

What Library Resources did you use OR intend to use?

Books	70	49.6%
Websites/Resources Online	45	31.9%
Brochures/Booklets Provided at Sessions	7	5.0%
DVD's	7	5.0%
Magazines/Newspapers/Etc.	5	3.5%
E-Books	4	2.8%
Library Staff	3	2.1%

Who did you talk about what you learned or financial issues since the Kickoff?

Spouse	38	21.0%
Friend	28	15.5%
Other Relative	26	14.4%
Co-Worker	26	14.4%
Son/Daughter	19	10.5%
Parents	14	7.7%
Financial Advisor/Broker/Banker	12	6.6%
Patron	7	3.9%
Other	11	6.1%

How many did you talk to?

Average participant	4 people	
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Source: *Post-It* Activity at Wrap-Up Celebrations
(Four Charts)

Source: Smart Investing Circulation Request

Financial/Investment Book and DVD Circulation at Participating Libraries (2 Charts)

Circulation of Financial Books & DVDs at 22 Participating Libraries			
Circulation of Financial Books			
BEFORE	DURING	AFTER	% Increase from Before to During Period
282	501	413	77.7%
Circulation of Financial DVDs			
BEFORE	DURING	AFTER	% Increase from Before to During Period
10	18	21	80.0%

Source: Collection of Comment Cards from 22 Libraries & NLC's Loan Collection

New Resources' Comment Cards (Three Charts)

New Resources' Comment Card Responses								
1. How Useful is this resource to you?	Very Useful	Somewhat Useful	Useful	Not very useful	Not at all useful	TOTAL		
	# responding	68	20	8	8	0	104	
	% of responses	65.4%	19.2%	7.7%	7.7%	0.0%		
	% Useful to very useful	92.3%						
2. How likely are you to apply what you learned from this book/resource?	Very likely	Somewhat Likely	Likely	Not very likely	Not at all likely	I didn't learn anything new	TOTAL	
	# responding	64	14	15	5	2	1	101
	% of responses	63.4%	13.9%	14.9%	5.0%	2.0%	1.0%	
	% Likely to very likely	92.1%						
	3. Would you recommend this book/resource to family or friends?	Yes	No	TOTAL				
		# responding	91	5	96			
% of responses		94.8%	5.2%					

Source: Nebraska Library Commission's Circulation Desk Data

Nebraska Library Commission's Circulation of Financial Materials via Statewide Loan (One Chart)

NLC's Circulation of Financial Materials via Statewide Loan			
Month	Circulation Numbers	Month	Circulation Numbers
Prior to June, 2014	0	Dec. 2014	4
June 2014	2	Jan. 2015	0
July 2014	49	Feb. 2015	0
Aug. 2014	0	Mar. 2015	0
Sept. 2014	2	April 2015	9
Oct. 2014	13	May 2015	37
Nov. 2014	36	June 2015	0

Source: Nebraska Library Commission's OverDrive Circulation Statistics

Financial eBook Circulation through OverDrive (One Chart)

Financial eBook Circulation through OverDrive			
Month	eBooks purchased with other funds	eBooks purchased with FINRA grant funds	Total Circulation
April 2013	15		15
May 2013	16		16
June 2013	15		15
July 2013	20		20
Aug. 2013	19		19
Sept. 2013	17		17
Oct. 2013	16		16
Nov. 2013	21		21
Dec. 2013	35		35
Jan. 2014	45		45
Feb. 2014	34		34
March 2014	39		39
Total Pre Grant Funds:			292
Average per Month:			24
April 2014	30	14	44
May 2014	28	46	74
June 2014	37	49	86
July 2014	23	47	70
Aug. 2014	31	31	62
Sept. 2014	27	20	47
Oct. 2014	32	30	62
Nov. 2014	26	20	46
Dec. 2014	20	23	43
Jan. 2015	32	27	59
Feb. 2015	20	23	43
Mar. 2015	30	14	44
April 2015	36	31	67
May 2015	32	52	84
June 2015	39	48	87
Total Post Grant Funds:			918
Average per Month:			61

Source: Nebraska Library Commission's Website Statistics

Nebraska Library Commission's Smart Investing Webpage Statistics: Visitor Sessions, Average Session Length, and Unique Visitors (Three Charts)

Nebraska Library Commission's Smart Investing Webpage Statistics			
Month	Visitor Sessions	Average Session Length (minutes:seconds)	Unique Visitors
April, 2014	275	11:15	125
May, 2014	349	5:18	87
June, 2014	252	5:33	77
July, 2014	142	7:32	62
Aug., 2014	116	15:19	44
Sept., 2014	117	2:35	76
Oct., 2014	93	10:42	73
Nov., 2014	64	6:04	46
Dec., 2014	38	11:28	30
Jan., 2015	78	4:05	56
Febr., 2015	70	2:36	50
March, 2015	55	5:59	43
April, 2015	65	2:15	55
May, 2015	101	16:55	69
June, 2015	73	21:11	60

Nebraska Library Commission's Smart Investing Webpage Statistics: Visitor Sessions (One Chart)

NebraskAccess-- Money & Investing Webpage Views	Views (Before)		Views (After)	Percent Increase/Decrease
October, 2013	13	October, 2014	22	69.2%
November, 2013	22	November, 2014	30	36.4%
December, 2013	16	December, 2014	31	93.8%
January, 2014	18	January, 2015	41	127.8%
February, 2014	133	February, 2015	34	-74.4%
March, 2014	24	March, 2015	58	141.7%
April, 2014	19	April, 2015	56	194.7%
May, 2014	19	May, 2015	68	257.9%
June, 2014	20	June, 2015	91	355.0%

Source: Smart Investing: Marketing Survey

Off-Site Locations where Posters, Flyers and Bookmarks were Displayed/Distributed (One Chart)

Off-Site Locations Where Posters, Flyers and Bookmarks were Displayed and Distributed (Percent is percent of 22 libraries that displayed/distributed here)								
Retail Stores	Business Offices	City Hall	Churches	Chamber of Commerce	Educational Institution	Senior Centers	Service Organizations	Other
15	12	16	5	8	5	13	4	6
68.2%	54.5%	72.7%	22.7%	36.4%	22.7%	59.1%	18.2%	27.3%

Participating Library Responses to Offering Similar Training to their Customers and Library Staff: "I would like to..." (One Chart)

Participating Library Responses to...		
I would like to:	Yes	No
Promote the "online" training modules to customers	16	6
Have another opportunity to offer Smart Investing training	9	13
Have another opportunity for library staff to participate in Financial Resource training	8	14

Source: Smart Investing Customer Training Pre-Evaluations

Pre-Evaluation Responses to: How did you hear about the Smart Investing Program (One Chart)

Pre-Survey Responses to the following Question: How did you hear about the Smart Investing program?	
	# Responding
Library Staff	105
Newspaper Article	49
Flyer/poster	43
Friend/family	29
Bookmark	12
Local business or Organization	7
Newsletter	6
Other (specify)	36
Other--Email	11
Other--Radio	9
Other--FaceBook	7
Other--Website	5
Other--TV	2
Other--At Conference/Event	1
Other--On Marquee	1

Source: Smart Investing: Marketing Survey

Marketing Strategies Undertaken As Revealed by Marketing Survey (Five Charts)

Marketing Strategies Undertaken by the Participating Libraries		
Media/Communication Outlets Utilized by Local Teams	# of Libraries	Percent of 22 Libraries
Newspaper	22	100.0%
Magazine	1	4.5%
Radio	10	45.5%
Television	6	27.3%
Library Newsletter	12	54.5%
Other Organization's Newsletter	4	18.2%
On-Site Promotions at the Participating Libraries		
Displays	19	86.4%
Posters	21	95.5%
Flyers	19	86.4%
Tent Cards	12	54.5%
Bookmarks	19	86.4%
Vinyl Banner	15	68.2%
Online and Social Networking Strategies Undertaken by Local Teams		
Library Website	19	86.4%
Partner Website	4	18.2%
Community Calendar	12	54.5%
FaceBook	17	77.3%
Twitter	2	9.1%
Outreach and Other Communication Strategies Undertaken by Local Teams		
Speaking Engagements	4	18.2%
Interview Shows	4	18.2%
Announcements at Meetings/Events	18	81.8%
Email Blasts	10	45.5%
Phone Calls	3	13.6%
Bill Inserts	1	4.5%
TOTAL	254	
Average # of strategies per Library	12	

How Effective was your Marketing (One Chart)

How Effective was your marketing strategy in getting the word out about your training?	Not at all effective	Not very effective	Somewhat effective	Effective	Very effective
# of Responses:	0	2	13	6	1
Percent of 22 Libraries:	0.0%	9.1%	59.1%	27.3%	4.5%