APPLICATION FOR PARTICIPATION IN THE

2018 Your Money, Your Goals Cohort

OMB No. 3170-0068
Expiration Date: 3/31/2020

The Consumer Financial Protection Bureau (CFPB) will provide *Your Money, Your Goals* toolkits, training, and technical assistance to up to 40 organizations across the country that are committed to helping financially empower the populations they serve. This is not an opportunity for a grant, contract, sub-contract, or funding. This is an opportunity for public and private organizations or entities to receive consumer education materials, training that prepares your organization to train staff, volunteers, or other community partners, and technical assistance to integrate financial empowerment and capability strategies into their existing service delivery model.

The CFPB will support members of the 2018 Cohort in using the *Your Money, Your Goals* toolkit to help build the financial capability of those they serve. The toolkit is designed for use in organizations that rely on staff or volunteers to coach, counsel, or mentor the people they serve. The toolkit is available in English and Spanish on our website (consumerfinance.gov/your-money-your-goals). Organizations have used various innovative approaches to implement *Your Money, Your Goals* training, tailoring it to their structure, mission, modes of service delivery, and clientele. When combined with the training, the toolkit includes the resources that staff and volunteers need to help people set goals, choose financial products, and build skills in managing money, credit, and debt.

If you are selected, the CFPB will provide the following:

- A Train-the-Trainer event (in-person or webinar) for members of participating organizations designated as trainers. These trainers would then lead workshops for frontline service providers, volunteers, or community partners to help them use *Your Money, Your Goals* in their work.
- Hard copies of the complete toolkit for the staff/volunteers the organization trains.
- Technical assistance in determining training priorities and adapting use of the toolkit for the organization or program.
- Coordination calls for all cohort participants at key points during the year.

To participate

The CFPB anticipates that training and technical assistance will begin in January 2018 and conclude in December 2018.

To be a good fit for this cohort, organizations must serve low-income and/or economically vulnerable people. Other criteria include:

- **Commitment to integrating financial empowerment into their work.** Demonstrate an understanding of the benefit of helping the people you serve become more financially capable and how their increased financial capability may help them achieve their goals and the outcomes your organization's services support.
- **Staff capacity for training on and use of the *Your Money, Your Goals* toolkit.** Demonstrate capacity to dedicate staff time to lead training of other staff within the organizations and/or other partners within your community.
- **Staff capacity to use toolkit with clients.** Demonstrate capacity to commit staff or volunteer time directly to using the *Your Money, Your Goals* toolkit with low-income and/or economically vulnerable populations.
- **Commitment to collect and return training surveys.** Willingness to fulfill survey collection responsibilities, which enable us to continue to improve the toolkit and measure its impact.

We are interested in engaging organizations with a variety of capacities and approaches. We welcome both organizations experienced in the work of financial empowerment and those interested in learning how to integrate financial capability topics into their work to increase the value of their existing services.

As you consider how you would implement *Your Money, Your Goals*, you may find the framework detailed in *Building Financial Capability: A Planning Guide for Integrated Services* (acf.hhs.gov/sites/default/files/ocs/afi_resource_guide_building_financial_capability_final.pdf) useful. It was developed to help organizations integrate financial capability strategies into their work by the Administration for Children and Families, U.S. Department of Health & Human Servicess.

Privacy Act Statement

The information you provide, including contact information, will only be used for managing participation in financial empowerment initiatives sponsored by the Consumer Financial Protection Bureau ("CFPB"). The financial empowerment initiatives are opportunities for public and private organizations or entities to receive tools, training, technical assistance, and other services to help them reach low-income and economically vulnerable consumers. Identifying information collected may be used by and disclosed to employees, contractors, agents, and others authorized by the CFPB to receive this information to assist in related activities.

Information collected by the CFPB will be treated in accordance with the System of Records Notice ("SORN"), CFPB.021 – CFPB Consumer Education and Engagement Records, 77 F.R. 60382.

This collection of information is authorized by Pub. L. No. 111-203, Title X, Sections 1013 and 1022, codified at 12 U.S.C. §§ 5493 and 5512.

Your participation is voluntary, and you may withdraw participation at any time. You are not required to submit or provide any identifying information; however, not doing so may result in the CFPB being unable to fulfill your request.

Paperwork Reduction Act Notice

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and not withstanding any other provision of law a person is not required to respond to a collection of information unless it displays a valid OMB control number. The OMB control number for this collection is 3170-0068. It expires on 3/31/2020. The time required to complete this information collection is estimated to average approximately 5 hours per response. Comments regarding this collection of information, including the estimated response time, suggestions for improving the usefulness of the information, or suggestions for reducing the burden to respond to this collection should be submitted to Bureau at the Consumer Financial Protection Bureau (Attention: PRA Office), 1700 G Street NW, Washington, DC 20552, or by email to CFPB_PRA@cfpb.gov.

Organization information

1 **Please provide your organization's contact information**

ORGANIZATION NAME

ADDRESS

CITY

STATE

ZIP CODE

POINT OF CONTACT NAME

EMAIL

WORK PHONE

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2 **What is your organization's mission and vision?**

MISSION

VISION

3 **Describe your organization's geographic service territory and the populations it serves**

Understanding of the project

4 **Describe your understanding of and commitment to this project's goals**

5 **Describe how this project's services will be integrated into your organization's existing service model, including any complementary wrap-around services**

6 **Describe your organization's capacity to undertake this project, including availability of administrative support**

Project goals

7	How many trainers will your organization plan to have trained through this effort?	☐ trainers
8	Within the next year, how many trainings will your organization hold after your trainers are trained?	☐ trainings
9	Within the next year, how many frontline staff, volunteers, or community partners does your organization plan to train?	☐ staff/volunteers /partners
10	Within the next year, how many clients will your organization reach as a result of this effort?	☐ clients

Information sharing

11	Can your organization commit to administering pre- and post-surveys to all participants of trainings your organization will hold and to share those surveys with the CFPB?	○ YES ○ NO

Submission instructions

Email this completed application along with the required documents listed below to YourMoneyYourGoals@cfpb.gov. If your organization does not have any of these required documents, provide an explanation in the body of your email.

- Completed application
- Annual Report
- IRS Form 990
- Most recent financial audit
- Accessibility Policy
- Nondiscrimination Policy

Email YourMoneyYourGoals@cfpb.gov