



2021 Your Money, Your Goals Cohort

Important facts about the Your Money, Your Goals cohort:

- Training and technical assistance will be available to up to 40 organizations
- It is NOT a grant, contract, sub-contract, or funding to organizations
- Applications due X/X/20XX

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. The CFPB will support chosen organizations in the 2021 cohort, with 1) Your Money, Your Goals and related financial empowerment and consumer education materials; 2) Training tailored to each organization to prepare staff, volunteers, or other community partners to use and to train others on the use of the tools and resources included in [Your Money, Your Goals](#); and 3) Technical assistance to help each organization integrate financial empowerment and capability strategies into their existing delivery model. Training and technical assistance will be provided through a CFPB-contracted vendor.

The toolkit and other materials are available in English and Spanish on our website (consumerfinance.gov/your-money-your-goals). When combined with the training, these materials provide 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 Bureau will provide the following:

- A Train-the-Trainer event (in-person or via webinar) led by specialized trainers and/or CFPB staff for designated members of the organization's team. These designated trainers would then lead workshops for frontline service providers, volunteers, or community partners to help them use Your Money, Your Goals in their work. In some organizations, these individuals may have or take on a formal training role. In others, they may be informal leaders, champions and mentors who share resources and motivate their colleagues to learn about and use the tools.
- Hard copies of the toolkit and other Your Money, Your Goals materials for the staff/ volunteers the organization trains.
- Technical assistance in determining training priorities and adapting materials to the unique needs and context of the organization or program.
- Coordination calls for all cohort participants at key points during the year to promote peer learning, support and to share promising practices.

To participate

The CFPB anticipates that training and technical assistance will begin in January 2021 and conclude in December 2021.

Your Money, Your Goals is designed for organizations that serve low-income and/or economically vulnerable people. The tools and training approach is designed for organizations and frontline staff that have one-on-one interactions with vulnerable consumers. While the materials may be used in wide variety of settings, past participants have generally been most successful in integrating the tools if they work in a setting that allows them repeated, direct contact with consumers over a period of time. Other criteria for the cohort 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 provide support or assistance and 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 to using the *Your Money, Your Goals* toolkit with low-income and/or economically vulnerable populations.
- **Commitment to fulfill survey collection responsibilities.** This includes collecting and returning training surveys to the CFPB's contracted vendor for compilation of data.

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 [Your Money, Your Goals Implementation Guide](#) helpful. It contains detailed information on the process of planning training workshops, considering how to integrate use of the tools into your work (including links to in-depth integration resources created by the U.S. Department of Health and Human Services), and understanding how you can use CFPB's Financial Well-being Scale with the people you serve.

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 Bureau 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, 83 FR 23435.

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 Bureau 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 xx/xx/xxxx. The time required to complete this information collection is estimated to average approximately 3 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 the Consumer Financial Protection Bureau (Attention: PRA Office), 1700 G Street NW, Washington, DC 20552, or by email to CFPB_Comments@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

 - -

(Box for job title)

ADDITIONAL POINT OF CONTACT NAME (OPTIONAL)

ADDITIONAL POC EMAIL

2 What is your organization's mission and vision?

MISSION

VISION

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

Your organization and its plans for Your Money, Your Goals

4 Describe your understanding of and commitment to this project's goals, including how this project links to outcomes you currently track for your organization and program participants.

5 Describe how your organization's staff members or volunteers typically interact with vulnerable consumers or clients. Check all that apply:

- One-on-one meeting or conversation with an individual, with minimal to no follow up
 - One-on-one meeting or conversation, with some follow up at regular intervals
 - Regular one-on-one meetings over a period of six months or more
 - Group sessions/classes or interaction that is not one-on-one
 - A combination of one-on-one meetings and classes or other group settings
- Other – _____

6 Describe your organization's existing service model and how financial empowerment will be integrated into it.

7 Describe your organization's capacity to undertake this project, including availability of administrative support and a designated staff member who will leading its implementation. Will this be will be integrated into ongoing staff/ volunteer training?

YOUR MONEY, YOUR GOALS COHORT APPLICATION FORM

Project goals

7 How many individuals will participate in the CFPB-led train-the-trainer and then lead workshops for or equip other staff and volunteers to use the materials? trainers

8 Within the next year, how many workshops for frontline staff, volunteers, or community partners will your trainers lead? Do not include workshops for clients in this total. workshops

9 Within the next year, how many frontline staff or volunteers from your organization and/or from community partners does your organization plan to train? partners

10 Within the next year, how many clients will your organization reach using Your Money, Your Goals resources? 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 Bureau? 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