



Important facts about the [Your Money, Your Goals](#) training partnership program:

- Customized training and technical assistance will be available to approximately 8-12 organizations.
- It is NOT a grant, contract, sub-contract, or funding to organizations.
- Applications due November 1, 2021.

The [Consumer Financial Protection Bureau](#) (CFPB) will provide Your Money, Your Goals materials, training, and technical assistance to organizations across the country that are committed to helping financially empower the populations they serve.

The CFPB will support the selected organizations in the 2022 cohort with:

1. Your Money, Your Goals and related financial empowerment and consumer education materials
2. Training on the use of the tools and resources tailored to each organization's staff and other community partners; special focus on consumer protection (i.e. avoiding predatory lending and scams, the CFPB complaint function)
3. Peer learning groups and communities of practice to exchange knowledge, experiences and practical tips
4. Invitations to listening sessions or focus groups to share the perspective of their clients with the CFPB and expand the voice of vulnerable consumers in consumer protection
5. Technical assistance to help each organization build financial empowerment and capability strategies into their existing delivery model
6. Technical assistance to track outcomes related to financial well-being

Training and technical assistance will be provided through a CFPB-contracted vendor. The Your Money, Your Goals 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 frontline staff need to help people set goals, choose financial products, and build skills in managing money, credit, and debt.



To participate

The CFPB anticipates that training and technical assistance will begin in January 2022 and continue for up to 24 months. Your Money, Your Goals is designed for organizations that serve low-income and/or economically vulnerable people. For this training cohort, priority will be given to organizations with the capacity to train at least 250 frontline staff annually and to use the resources with large numbers of vulnerable consumers, typically on a state, regional or national scale.

The tools and training approaches are designed for organizations and frontline staff that have regular one-on-one interactions with vulnerable consumers. While the materials may be used in a 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 and consumer protection into ongoing work.** Demonstrate an understanding of how increased financial capability of your clients may help them achieve their goals and the outcomes that your organization's services support.
- **Demonstrate capacity to dedicate staff time** to planning and coordinating training and follow up activities, participating in cohort peer learning sessions, and to implementing resources with clients. Depending on the nature of the partner's work, key staff participation in cohort activities may range from 2 to 12 hours per month during the 24-month period.
- **Staff capacity to effectively participate** in training on and use of the Your Money, Your Goals resources. The time commitment of frontline staff participants will vary widely, depending on the nature of the training planned by the participating organization.
- **Commitment to consumer protection** and elevating the voice of your clients. This includes helping consumers to understand and assert their rights, and to submit complaints and share stories with CFPB.
- **Commitment to fulfill limited survey collection** responsibilities and share information about outcomes with peer organizations and the Bureau. This includes ensuring that training participants submit electronic [pre-](#) and [post-](#)training surveys to the CFPB or its contracted vendor for compilation of data.
- **Commitment to engaging in peer learning activities**, such as communities of practice or similar activities to share experiences using financial literacy information and tools to promote client financial empowerment.

Priority will be given to organizations or large programs within organizations, typically training at least 250 frontline staff annually, with a strong commitment to financial empowerment.

YOUR MONEY, YOUR GOALS TRAINING PARTNER APPLICATION FORM

As you consider how you would use Your Money, Your Goals, we encourage you to review the variety of resources including the toolkit, downloadable tools, companion guides, booklets and videos to spark action. Information on the Bureau's complaint function is available [here](#). You may also consider using the CFPB's [Financial Well-being Scale](#) with the people you serve.

Organizations that are not selected as training partners will have opportunities to receive training through public webinar training sessions throughout the year. They may also be considered for other specialized training opportunities and listening sessions organized by the Bureau.

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 notwithstanding 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 4/30/2023. 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.

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

ORGANIZATION NAME

ADDRESS

CITY

STATE

ZIP CODE

POINT OF CONTACT NAME

POINT OF CONTACT JOB TITLE

WORK PHONE

EMAIL

ADDITIONAL POINT OF CONTACT NAME (OPTIONAL)

ADDITIONAL POINT OF CONTACT EMAIL (OPTIONAL)

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 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 on-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
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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 lead its implementation. Will this be integrated into ongoing staff training?

Project goals

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

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

Information sharing

10 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