SUBMISSION GUIDELINES

OPEN: SEPT 1, 2020
CLOSE: OCT 15, 2020

Are you passionate about helping people with their money so they can improve their lives? We are too, which is why we want to help you equip your employees with the knowledge and skills to build confidence, increase organizational capacity, and create lasting impact in the lives of those you serve.

The Association for Financial Counseling and Planning Education® (AFCPE®) Strategic Impact Fund has allocated up to $100,000 in 2020 to provide capacity building scholarships to nonprofit community-based organizations focused on building a thriving community and bridging gaps of inequality with the highest standards of professionalism.

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OUR VISION

A future where all people — regardless of income or background — are empowered to achieve lasting financial well-being through the highest standards of financial counseling, coaching and education.

OUR MISSION

To ensure the highest level of knowledge, skill and integrity of the personal finance profession by certifying, connecting and supporting diverse and capable professionals who serve communities worldwide.

OUR COMMITMENT TO DIVERSITY & INCLUSION

"Diversity and inclusion ensure a safe, positive, nurturing, and tolerant environment with mutual respect, free of prejudice. They celebrate differences, including those visible and invisible, in addition to thoughts and opinions that are essential for the involvement and empowerment of our society."

At AFCPE, every decision we make goes through an equity screen. Here are the questions we ask ourselves when making decisions. Before submitting, please make sure that your scholarship proposal has a lens of inclusion.

AND TO THE HIGHEST STANDARD
Who Should Apply

We are seeking to fund organizations that provide community-based financial and/or social service for low to moderate income populations. Here are a few examples to help you imagine your impact:

- Developing or advancing financial counseling expertise within your workforce development programming.
- Offering financial counseling or education services within a domestic violence shelter.
- Adding financial education to services provided for people who are incarcerated or transitioning from the prison system.
- Starting a financial wellness department within your nonprofit.
- Elevating the level of knowledge, skill, professionalism for current financial counseling/education services.

Scholarship Guidelines

- All applicants must be a nonprofit community-based organization that provides financial and/or social services for low to moderate income populations and is federally determined as a 501(c)(3) entity.
- All applicants must embrace AFCPE’s mission and vision, and demonstrate a focus on work through a lens of diversity, equity, and inclusion.
- Applicant may request funding in an amount not to exceed $40,000.
- AFCPE may grant partial scholarships to some applicants. For example, applicant requests 10 AFC certifications for staff, but is granted 5.
- If selected, you will enroll your requested staff members in the outlined certification/training programs within thirty days of being awarded the scholarship. AFCPE will provide discount codes, so there will be no cost to you.
- If scholarship includes AFC certification, recipients will aim to take the AFC exam within 1 year of enrollment.
- Final number of scholarships awarded will be determined by AFCPE. Total amount not to exceed $100,000.
Your Commitment

AFCPE will work in partnership with scholarship recipients to elevate the important work that you are doing in your community, and share the impact that certification and training is providing to your staff and to those whom you serve. The investment of scholarships is amplified by the recipients’ ability to share stories and metrics. Scholarship recipients commit to:

- Share a press release or blog post on your website to announce your receipt of the scholarship.
- Within the first year, write an article to share with your network and ours – providing any measurable change that you have seen, and/or a story of impact, after your staff participated in AFCPE training/certification.
- Provide a 1-year progress report.

How to Apply

Visit afcpe.org between September 1 – October 15, 2020 to complete the application. Below is a brief outline of the application for your preparation:

I. Mission: your organization’s mission statement or brief description.
II. Statement of Need: provide 2-4 sentences summarizing your vision for the funding.
III. Reach: indicate your geographic and demographic reach and numbers served.
IV. Need: explain how this funding will be used to enhance capacity and professionalism in your organization, improve the quality of your programs/services, and/or address issues of inequality in your community.
V. Impact: How will AFCPE certification or training enhance the capacity and impact of our organization?
VI. Budget: outline your funding request using the examples below to demonstrate how the funding will be used.
VII. Timeline and activities: clarify your timeline for completion, related activities, and goals.

Scholarship proposals can include any combination of the below three programs. You are not required to request all three types. Pricing is provided below to help you estimate the funding needed.

Note: We recognize that preparing for the AFC exam, or taking online courses requires additional time for your staff. You may build the cost of this time into your scholarship proposal.

<table>
<thead>
<tr>
<th>Certification</th>
<th>Cost</th>
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<tbody>
<tr>
<td>AFC Self-Paced Study, per candidate</td>
<td>$1,050</td>
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</tbody>
</table>

*Included: Registration Fee, $50; AFC Books & Online Course, $600; AFC Exam, $700. + Nonprofit Exam Discount ($350) Certification issued upon completion.
Training | Cost
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**Money Management Essentials, per candidate**
An online, self-paced course that covers basic personal finance concepts. Badge of completion issued upon completion. | $325

**Sage Financial Solutions Coaching Essentials, per candidate**
Included: 2-days 12-hour training, followed by 2 web-based 1-hour group sessions with Mentor Coaches (multiple date options provided across 6-8 weeks) | $1,200

**Examples:**
These are just sample proposals. You may customize your request to fit your organizational size and needs.

**Option A**
9 Money Management Essentials Courses: $2925
1 AFC Certification: $1050
Total: $3975

**Option B**
10 Money Management Essentials Courses: $3250
5 AFC Certifications: $5250
Total: $9500

**Option C**
10 Money Management Essentials Courses: $3250
10 AFC Certifications: $10500
Total: $13750

**Option D**
10 Money Management Essentials Courses: $3250
5 AFC Certifications: $5250
15 Coaching Essentials: $18000
Staff Wages: $5000
Total: $31500
## Dates and Deadlines:

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tbody>
<tr>
<td>Application Due</td>
<td>Oct 15, 2020 by 11:59 PM ET</td>
</tr>
<tr>
<td>Scholarship Announced</td>
<td>Dec 1, 2020</td>
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<tr>
<td>If Accepted:</td>
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<tr>
<td>Program Enrollment Deadline</td>
<td>Dec 15, 2020</td>
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<tr>
<td>Press Release or Article Shared</td>
<td>Between Dec 1, 2020 – Mar 1, 2020</td>
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<tr>
<td>AFC Exam Goal Date</td>
<td>Dec 15, 2021</td>
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<tr>
<td>1-year Progress Report Due</td>
<td>Dec 15, 2021</td>
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