



79 S. State Street, Suite D3
Westerville, OH 43081

Phone: 614.368.1055

www.afcpe.org

Financial Counseling and/or Planning Center of the Year

This award goes to a financial counseling or planning center that has demonstrated its effectiveness in its local community.

The center is responsive to target audience needs and provides materials and delivery of services that are in tune with its audience. The evidence of its impact is widespread, and other centers can learn from or adapt this program to effectively support clients.

Application Questions:

There is a 500-word maximum for each essay question.

Optional: Submit a short, 2-5 minute video summarizing your application. This is a chance for applicants to visually 'tell their story' and highlight their experiences in a visual format.

1. Using a definition of service as “the giving of time and expertise to improve the personal finance field and/or provide outreach to a particular audience”, please describe the service commitment of the Center and how it responds to the needs of the target audience.
2. Please describe the Center’s service delivery model. Identify the needs and learning styles of the Center’s audience, and explain how the Center’s services address these needs effectively.
3. Please explain how the Center collaborates with other organizations or partners. Describe why these partnerships are important and how they help the Center serves their audience. If the Center does not collaborate, please explain why.
4. Please discuss how the Center ensures timely delivery of its services. Explain how the Center addresses urgent or time-sensitive client needs, and how it adjusts its services to deliver support when it’s most needed.



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5. Please describe the materials and methods the Center uses to deliver services. Explain how the Center considers client literacy levels, learning styles, and diversity in developing and delivering services.
6. How does the Center present its services in an interesting, interactive, and engaging way? Please provide links to materials if available. How are the services evaluated, and what findings show behavior changes or increased knowledge? Include quantitative data and statistical tools if possible. Share any data or stories that demonstrate the positive impact on people's financial lives, including both formal evaluations and informal feedback or personal success stories. (If not applicable, please indicate N/A.)
7. Please describe the extent to which the services at the Center can be replicated or adapted for use by other practitioners/centers. If possible, provide examples of other centers who have successfully replicated the program. If it cannot be replicated or adapted please explain why.
8. Attach relevant documentation as needed, not to exceed 10 pages total. (optional)
9. Please provide a brief history of the organization.
10. Biographical Sketch: This will be used for the AFCPE Awards Program if applicable.
11. Summarize your application in 200 words or less. This will be used for the AFCPE Awards Program if applicable.
12. Optional: Submit a short, 2-5 minute video summarizing your application. This is an opportunity for applicants to 'tell their story' in a visual format.