



1700 G Street NW, Washington, DC 20552

Organizations Participating in the 2017 *Your Money, Your Goals* Cohort

Federal, state, and local government agencies

California Department of Community Services and Development (CSD) – statewide
CSD partners with a network of private, non-profit, and local government community-based organizations dedicated to helping low-income families and individuals achieve and maintain self-sufficiency. CSD will pilot the integration of *Your Money, Your Goals* in a select number of its network partners that administer the Low Income Home Energy Assistance Program and the Community Services Block Grant.

City and County of Denver Department of Human Services (DDHS) – Denver, CO
DDHS serves a large and culturally diverse population of primarily low-income, economically vulnerable individuals and families. The people they serve through their community resource center (C.A.R.E. Center) consist of children and adults involved in Child Welfare services, Child Support, and Prevention Services. DDHS will integrate *Your Money, Your Goals* into all of the programs offered through its C.A.R.E. Center either through workshops or one-on-one case management.

Public Housing Authorities – nationwide

Service coordinators from the Family Self-Sufficiency and JobsPlus programs funded by the U.S. Department of Housing and Urban Development will participate in direct to frontline trainings to learn how to embed *Your Money, Your Goals* into the work they do with their housing clients. Nearly 50 public housing authorities in 26 states and territories are participating: Arizona, California, Colorado, Florida, Hawaii, Illinois, Kansas, Kentucky, Maryland, Minnesota, Mississippi, Nebraska, Nevada, New Hampshire, New Jersey, New York, North Carolina, Ohio, Oregon, Pennsylvania, Puerto Rico, Rhode Island, Tennessee, Texas, Virginia, and Washington.

San Francisco Office of Financial Empowerment (OFE) – San Francisco, CA

The San Francisco Office of Financial Empowerment (OFE) uses the power of city hall to strengthen economic security and reduce intergenerational poverty. The OFE equips low-income families with knowledge, skills and resources to strengthen their household security today and seize opportunities tomorrow that improve their wellbeing and that of future generations. This includes promoting access to safe and affordable financial products, college savings, and financial coaching. The OFE's goal is to support San Francisco city departments to provide *Your Money,*

Your Goals training to frontline employees that engage economically vulnerable residents every day.

U.S. Department of Agriculture Cooperative Extension – nationwide

The U.S. Department of Agriculture Cooperative Extension is continuing its *Your Money, Your Goals* training for a third year, with financial educators planning to hold training events in over 20 communities across 15 states: Connecticut, Delaware, Florida, Indiana, Iowa, Kansas, Maryland, Michigan, Minnesota, Mississippi, Missouri, Ohio, Texas, Utah, and Virginia.

Virginia Department for Aging and Rehabilitative Services – statewide

The Virginia Department for Aging and Rehabilitative Services, in collaboration with community partners, provides and advocates for resources and services to improve the employment, quality of life, security, and independence of older Virginians, Virginians with disabilities, and their families. *Your Money, Your Goals* training will extend to staff from the Work Incentive Specialist Advocate program and partner organizations such as the American Job Centers, Centers for Independent Living, Community Service Boards, Community Rehabilitation Programs, Ticket to Work Employment Networks, and several other community providers.

National non-profit organizations

Catholic Charities USA

After participating in the 2014-2015 *Your Money, Your Goals* national roll-out, Catholic Charities USA rejoins the *Your Money, Your Goals* cohort to serve as an umbrella organization that will coordinate training and technical assistance for three local Catholic Charities organizations in Colorado, Illinois, and Texas. In addition, Catholic Charities USA plans to leverage its own grant funding with our training and technical assistance to host a large direct to frontline training for all of the dioceses of the greater New York City area.

Community Action Partnership (CAP)

After participating in the *Your Money, Your Goals* national roll-out, CAP rejoins the *Your Money, Your Goals* cohort to serve as an umbrella organization that will coordinate training and technical assistance for 25 community action agencies. These agencies represent communities in 16 states: Arizona, Connecticut, District of Columbia, Kentucky, Maryland, Massachusetts, Michigan, Minnesota, Missouri, Nebraska, New York, Ohio, Tennessee, Texas, Virginia, and Washington.

LIFT

LIFT is a national nonprofit dedicated to empowering families to break the cycle of poverty. By fostering relationships between low-income parents of young children and dedicated volunteers, LIFT helps families build the personal well-being, social connections and financial strength to secure basic needs and to achieve long-term goals and aspirations. LIFT plans to integrate *Your Money, Your Goals* into its existing family coaching model across their four regional offices in Chicago, Los Angeles, New York, and Washington, D.C.

National Indian Council on Aging (NICOA)

NICOA is a non-profit organization founded in 1976 by members of the National Tribal Chairmen's Association to focus on aging American Indian and Alaska Native Elders. The mission of NICOA is to advocate for improved comprehensive health, social services, and economic well-being for American Indian and Alaska Native Elders. NICOA plans to leverage its participation in the 2017 cohort by using the *Your Money, Your Goals* toolkit to improve impact and positive outcomes for our Elders in the Elder Equity grant project. NICOA intends to deliver trainings in all 12 NICOA regions and will develop an ongoing, sustainable training program.

United Way Worldwide (UWW)

After participating in the 2014-2015 *Your Money, Your Goals* national roll-out, UWW rejoins the *Your Money, Your Goals* cohort to serve as an umbrella organization that will coordinate training and technical assistance for 6 local United Ways that individually applied to participate in the 2017 cohort. These six agencies serve communities in: California, Maryland, New Jersey, North Carolina, and Virginia. UWW plans to do additional outreach and recruitment within its nationwide network of local United Ways.

Statewide non-profit organizations

Alabama Asset Building Coalition (AABC)

AABC is a statewide nonprofit organization that has organized to promote financial stability for individuals and families. AABC plans to implement *Your Money, Your Goals* through its core programs that work directly with more than 200 professional financial trainers, housing counselors, bankers, educators, and leaders of wealth-building organizations that provide service to more than 4,000 low- to moderate-income people annually.

Connecticut Association for Human Services (CAHS)

CAHS promotes family economic security strategies that empower low-income working families to achieve financial independence. With more than 100 partner organizations, CAHS works to reduce poverty and build family economic success through outreach, education, and policy work. CAHS is already using the *Your Money, Your Goals* toolkit in its work with volunteer financial coaches. As part of the 2017 cohort, CAHS plans to integrate *Your Money, Your Goals* into the work performed by volunteers in its Connecticut Money School and Youth Money School programs.

Hawaii Youth Services Network (HYSN)

HYSN provides organizational capacity building via training and technical assistance to youth serving agencies in Hawaii and the Pacific Islands. HYSN will offer *Your Money, Your Goals* training and follow-up technical assistance on multiple islands for youth workers and educators. In the Commonwealth of the Northern Mariana Islands, HYSN will partner with the public school system on a Personal Responsibility Education Program that conducts positive youth development activities to address key adulthood preparation topics.

Local and regional non-profit organizations

Ascentria Care Alliance (Ascentria) – Manchester, NH

Ascentria is a faith-based organization that strives to provide high quality, person-centered care focused on the physical, intellectual, social, and economic well-being of its clients. The organization plans to use its participation in the 2017 *Your Money, Your Goals* cohort to develop a consistent financial coaching methodology across the agency, allowing staff to integrate *Your Money, Your Goals* tools and knowledge into their day-to-day work. Ascentria also hopes to deliver the program to low-income staff and to have volunteers serve as mentors to clients and staff on how to use the *Your Money, Your Goals* toolkit.

Community Service Society of New York (CSS) – New York, NY

CSS leads antipoverty initiatives, creates and implements programs that strengthen communities and helps low-income individuals and families build financial security. As part of the 2017 cohort, CSS hopes to expand its existing Financial Coaching Corps program, which trains older adults to become financial coaches, who then volunteer their services in local community-based organizations. CSS will recruit and train additional volunteers to utilize the *Your Money, Your Goals* toolkit in their work as financial coaches in various community organizations. Staff in CSS programs that address issues such as workforce development, education, and eviction prevention will also be trained to provide financial coaching to their clients.

CrescentCare – New Orleans, LA

CrescentCare is a community health center that offers quality care at low to no cost to members of the New Orleans community, whether or not they have insurance. Participation in the cohort will allow CrescentCare to provide training and tools for its attorneys and case managers to learn to use the toolkit with clients. *Your Money, Your Goals* training will be implemented in coordination with CrescentCare's Financial Coaching project, which is designed for recently-transitioned veterans and economically vulnerable consumers.

Food Bank for New York City – New York, NY

Food Bank for New York City has worked to end hunger throughout the five boroughs for more than 30 years. Through its network of more than 1,000 charities, schools, and community-based organizations citywide, Food Bank provides food for approximately 62.5 million free meals per year for New Yorkers in need. As part of the 2017 cohort, Food Bank seeks to embed a financial empowerment model throughout its network through training, technical assistance, and dissemination of the *Your Money, Your Goals* toolkit. With these tools, they hope to serve populations that are food insecure as well as those who are facing eviction.

Jewish Family Services of San Diego (JFS) – San Diego, CA

JFS's wide range of integrated services empower individuals and families to move toward self-sufficiency, support aging with dignity, and foster community connection and

engagement throughout San Diego County and the Coachella Valley. As part of the 2017 cohort, JFS is interested in weaving more financial wellness supports into the current services, using current staff.

Urban League of Palm Beach County (ULPBC) – Palm Beach, FL

ULPBC serves over 17,000 clients in the community through free programs and services in the areas of youth and education, health, housing, workforce, and community development. ULPBC has a Financial Empowerment Center that takes a comprehensive approach designed to help low-and moderate-income families find employment and become financially secure and upwardly mobile. As part of the 2017 cohort, ULPBC intends to add new services and tools including the *Your Money, Your Goals* toolkit, training and technical materials into the center's implementation plan. ULPBC will also serve as the umbrella organization for nine additional Urban Leagues.

Washington Heights and Inwood Development Corporation (WHDC) – New York, NY

WHIDC's activities include the operation of a micro-business development program, Business Operating Success System (BOSS), primarily targeting Spanish-speaking low-income immigrants who turn to the creation of businesses to support their families. As part of the 2017 cohort, a WHIDC business counselor/loan officer will be trained as a trainer, enabling her and the other business counselors to use the *Your Money, Your Goals* toolkit in one-on-one and classroom-type interactions with clients. WHIDC will also adapt its existing curriculums and management coaching efforts to leverage the *Your Money, Your Goals* toolkit materials.

Workforce Development, Inc. (WDI) – Rochester, MN

WDI is a private, non-profit agency dedicated to developing and advancing the workforce of Southeast Minnesota. WDI delivers its services through 10 area offices, six of which are designated as Minnesota Workforce Centers, in which multiple agencies deliver related services for job seekers and employers. Some of WDI's frontline staff have already received *Your Money, Your Goals* training. As a member of the 2017 cohort, WDI will work to further integrate *Your Money, Your Goals* into its service delivery model.

YWCA of Metropolitan Chicago – Chicago, IL

The YWCA's mission to eliminate racism and empower women is actualized through a large breadth of programs and services serving more than 200,000 women, children, and families annually. The YWCA will effectively increase internal referrals to its Economic Sustainability services by providing staff in other programmatic areas with the *Your Money, Your Goals* training, tools, and resources to assist them in starting conversations with clients around financial challenges.

Legal aid organizations

Greater Boston Legal Services (GBLS) – Boston, MA

GBLS provides free civil legal assistance to low-income individuals and families in Boston and 31 other cities and towns in the Greater Boston area. GBLS will implement *Your Money, Your Goals* tools and information in the work of its Consumer Rights Unit, which focuses on issues relating to foreclosure, debtors rights, and fair debt collection.

South Carolina Legal Services (SCLS) – statewide

SCLS, with 10 offices across the state, provides free civil legal services to eligible low-income residents throughout the 46 counties of the state. SCLS plans to offer *Your Money, Your Goals* trainings to its staff as well as partners from social services agencies and other organizations around the state.

Worker organizations

American Federation of State, County, and Municipal Employees (AFSCME) – nationwide

AFSCME represents more than 1.6 million men and women who have dedicated their careers to public service, both current workers and retirees. AFSCME's members include nurses, corrections officers, childcare providers, EMTs, engineers, sanitation workers, and many more. AFSCME plans to offer portions of *Your Money, Your Goals* content as workshops for its members around the country and train key personnel from both the national organization and affiliates to deliver these workshops.

North America's Building Trades Union (NABTU) – nationwide

NABTU joins for its second year of *Your Money, Your Goals* training and implementation. NABTU provides coordination and support to the work of its affiliated national and international unions. They plan to continue outreach and training to equip apprenticeship programs across the country to embed *Your Money, Your Goals* in their training programs. NABTU has 1,650 training centers and 200,000 apprentices across the country.

Organizations serving people with disabilities

California Foundation of Independent Living Centers (CFILC) – statewide

1. CFILC is a disability advocacy organization with a mission to increase access and equal opportunity for people with disabilities by building the capacity of Independent Living Centers across California. CFILC operates a variety of disability-focused programs, including a statewide alternative finance program, FreedomTech, that provides affordable financing for assistive technology and financial education resources. CFILC will work to integrate *Your Money, Your Goals* across all of their programs.

United Cerebral Palsy of Michigan (UCP MI) – statewide

UCP MI's mission is to connect people with disabilities to the opportunities and resources needed to live productive and independent lives. Since 2006, UCP MI has administered the Michigan Assistive Technology Loan Fund and the Michigan Employment Loan Fund. UCP MI plans to assess the financial needs of its community, develop and share accessible formats of all *Your Money, Your Goals* materials for those with various disabilities, and provide *Your Money, Your Goals* training, resources, and tools to its own staff and those of other local organizations that serve clients with disabilities.

Virginia Department of Aging and Rehabilitative Services (statewide)

Described above.

Other

Washington University in St. Louis Brown School of Social Work (Brown School) – nationwide

The Center for Social Development at Washington University's Brown School of Social Work is currently preparing to field a survey to approximately 5,000 social work faculty in the 760 accredited U.S. schools and programs of social work. The survey will include an invitation to participate in a webinar training on improving financial well-being in vulnerable households. The training will include content from *Your Money, Your Goals* and the Brown School's Financial Capability and Asset Building initiative.