2025 Impact to Insight Initiative LOI Application

Part 1 – Application Information

1. Project Title/Name

2. Applicant Name and Project Role

3. Applicant is

- ☐ an AFCPE Member in good standing
- ☐ an AFC in good standing
- ☐ neither an AFCPE Member or an AFC

4. Main contact phone number

Best phone number to reach you with questions regarding your application

5. Co -Applicant Name and Project Role, if applicable

6. Applicant is

- ☐ an AFCPE Member in good standing
- ☐ an AFC in good standing
- ☐ neither an AFCPE Member or an AFC

7. Budget Amount Requested

The Insight to Impact grant is currently funding project requests between $10,000 and $50,000. Project requests outside of these funding parameters will not be considered. Please enter the total amount of project funding requested from AFCPE®.

8. Project Duration

The Insight to Impact grant is currently funding projects with a project duration of less than, or equal to, 24 months. Projects longer than the stated duration will not be considered.

☐ I understand

9. Project Start Date

10. Project End Date

11. Qualifying US Tax ID

The recipient of the project funds, whether an individual or organization, must have an eligible U.S. tax identification number or social security number. Does one of the applicants for this project (or organization affiliated with this project) have a qualifying U.S. Tax ID who will receive the funds for this project?

☐ Yes

☐ No

12. IRB Approval

Are any applicants required to secure Institutional Review Board approval for this project?

- ☐ Yes
- ☐ No

13. Presentation at AFCPE Symposium

If awarded Insight to Impact grant funding, I am aware one, or more, members of the project team will be expected to present the project results in-person at the next scheduled AFCPE Symposium following completion. I understand the cost of registration, meals, and travel to the AFCPE Symposium are the responsibility of the grantee and cannot be included in the project budget.

- ☐ I understand

Part 2 – Project Overview and Impacts – Essay Questions

There is a 500 word maximum for each essay question.

The following essay questions are a critical component of the grant application. Each response should be thorough and address the topic indicated. Past applicants have found it useful to read through ALL essay questions before composing their answers. We recommend typing your answers outside the form (ex. MS Word) and then pasting your answers into the application once you have completed them.

Please contact (614) 368-1055 or grants@afcpe.org with any questions or concerns

2025 Impact to Insight Essay Questions

1. Project Overview and Impacts

Provide a brief overview of the project's partners, collaborative nature, communities served, goals and objectives, and key activities. What are the intended impacts of the program? Describe how the project's outcomes are realistic, measurable, and tied to program goals and objectives. If applicable, estimate the number of participants that will be served. Briefly summarize evidence that supports the need for this project and your strategy for meeting the need(s).

2. Collaboration Between Researchers and Practitioners

Clearly describe the collaboration between researcher(s) and practitioner(s) in this project, including their roles, sharing of information/resources, and coordinated contributions to the project. Is this a new/prior partnership? Provide an overview of the qualifications and experience of the key researcher(s) and practitioner(s).

3. Connect Research to Practice

Describe how the project will connect research and practice in the personal finance profession, discussing project objectives and activities that support this goal. What need/gap is being addressed? How are the collaborative relationships and activities in this project structured to effectively meet this need?

4. Develop Best Practices or a Model or Pilot

Describe how this project will develop a model or pilot, and/or how it furthers best practices in the personal finance profession. Discuss how this relates to the project's stated objectives and activities.

5. AFCPE AFC® Core Competencies (optional)

Please describe how this project addresses one or more of the [AFC core competencies](#).

6. Dissemination Activities

Please list the names and titles of the individuals who will present the project results at an AFCPE Symposium, following project completion (in-person presentation at Symposium is required).

Are there additional ways project results/resources will be disseminated to the personal finance profession and/or other communities? If so, please describe the project's dissemination goals and activities, including (but not limited to) activities that integrate with AFCPE resources/activities.

7. Communities Served

What communities does this project benefit/serve, and why? Please briefly summarize supporting information. If applicable, please describe how the project serves one/more communities that are financially at-risk, marginalized, and/or under-represented.

8. Build Access, Equity & Capacity

Describe how this project builds access, equity, and/or capacity for researchers, practitioners, and/or the communities served. This should relate to the extent to which program goals and objectives are being met.

Please answer the questions in the AFCPE Equity Screen.
1. What is the purpose of this project?
2. Who is most impacted by the project?
3. Do those most impacted have a voice in the project?
4. How does this project help to empower those it serves?

9. Scalability/Sustainability

If applicable, please describe the project's plans/strategies for scalability/sustainability. Sustainability refers to the ability to maintain

project activities/impacts over time. Scalability involves the capacity to expand or adapt the project to reach a broader audience or achieve a greater impact.

Examples include:

- Expanding a pilot or model based on the knowledge and relationships developed during the project.
- Conducting subsequent research or evaluations.
- Continuing to improve and deliver services that benefit communities.
- Sharing knowledge gained or resources created with professionals and/or communities.
- Developing or strengthening ongoing collaborative partnerships.

10. Research Design

Provide a clear summary of the purpose/goals of the research component of this project. Describe the significance to researchers, practitioners, and communities served.

Discuss the theoretical framework or concepts that underlie your reasoning for your research design. Describe the research methods, data collection, and data analysis plan and why it is appropriate for the project, its goals, and the participants. If IRB and/or community data collection/access is required, address your ability to secure that.

You may upload additional information related to your research plan.
Accepted formats: .pdf

Part 3– Budget Narrative

There is a 500 word maximum for each essay question.

The following budget questions are a critical component of the grant application. Each response should be thorough and address the topic indicated. Past applicants have found it useful to read through ALL essay questions before composing their answers. We recommend typing your answers outside the form (ex. MS Word) and then pasting your answers into the application once you have completed them.

For guidelines on submitting your budget, click here.

Please contact (614) 368-1055 or grants@afcpe.org with any questions or concerns

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2025 Impact to Insight Budget Narrative

1. Budget Narrative

Please provide a brief narrative of how the requested budget funds will be spent. This should include major budget line items for which grant funding is sought, such as staff, materials, etc. Also, identify individuals who may be responsible for periodic reporting of budget transactions.

If the amount requested from AFCPE is different from the total project

budget, explain the difference and specify other funding sources. Also, be aware that AFCPE funding is distributed over time as key activities of the project (milestones) are initiated and completed.

Check that your project budget does not include the following disallowed expenses:

- Institutional overhead (e.g. utilities, administrative expenses)
- Symposium expenses (registration, travel, hotel, meals, etc.)

Access the grant budget guidelines here

2. Proposed Budget

Please upload a copy of your proposed budget. You will be able to update your budget if/when you are invited to submit a full proposal.

Access the grant budget guidelines here

3. Proposed Milestones and Timeline

Please upload a concise summary of the key project milestones and their estimated time frames. You will be able to update your milestones/timeline if/when you are invited to submit a full proposal.

Accepted formats: .pdf