



New Partner Application

About the Financial Empowerment Center

Launched in December 2020, Tulsa's Financial Empowerment Center (FEC) was made possible by a grant from the Cities for Financial Empowerment (CFE) Fund. The program is overseen by the Mayor's Office of Resilience and Equity (MORE) and implemented by Goodwill Industries of Tulsa. A 30-member FEC Advisory Board advises the program.

The FEC model was first piloted in New York City in 2008 and has since spread to over a dozen cities, having served over 104,000 clients, helping them reduce debt by more than \$146 million and increase savings by \$22 million.

The Tulsa FEC provides free, one-on-one financial counseling to reach quantifiable client outcomes, such as:

- Establishing a credit score.
- Increasing credit score by 35+ points.
- Reducing number of delinquent accounts.
- Decreasing non-mortgage debt by at least 10%.
- Opening a safe and affordable banking account and using bank account actively.
- Setting aside at least one week's worth of income.
- Adopting new savings behaviors.

The Tulsa FEC has four counselors and can provide counseling services in English and Spanish. Counselors are certified credit counselors and have completed extensive training with the Cities for Financial Empowerment Fund and the National Association of Certified Credit Counselors. All counseling is currently done virtually via Zoom or via phone.

Potential clients may access the program by being referred by a financial navigator, a referral or co-location partner, or they can apply directly by filing out an appointment form at: <http://fecpublic.org/appointment-tulsa>. They will then:

1. Undergo a financial health assessment.
2. Schedule a follow up meeting.

Counseling is available in both English and Spanish. For more information on the City's financial empowerment programs, visit: <https://www.cityoftulsa.org/blueprint>

The role of FEC partners

Consistent partner referrals to the FEC helps ensure the program's sustainability. In the first year of the program, each FEC counselor has a goal of completing 480 counseling sessions.

Benefits to partners - FEC Partners benefit by receiving aggregate information of the clients referred to the program and having an additional individualized free resource for clients.

Commitment from partners - FEC Partners commit to identifying staff to oversee the referral process and attend regular FEC Partner meetings.

To become an FEC partner:

1. Participate in an initial meeting with FEC staff to learn about the program and discuss your program goals
2. Complete a partner application online (application questions for your reference are on the following pages).
3. Participate in a follow up meeting with the FEC non-profit manager and assigned counselor to discuss referral process and logistics. You will also be invited to present your program(s) to the financial resilience team at Goodwill at one of their weekly team meetings.

Tulsa Financial Empowerment Center

New Partner Application

Please submit your application via this form:

<https://forms.gle/L9x8AbCdqXMen8Yv7>

The application questions are included below for your reference.

Section 1. About your organization

1. Organization Information

Organization Name	_____
Street Address	_____
Mailing Address	_____
City, State ZIP	_____
Point of Contact Name	_____
Point of Contact Title	_____
Point of Contact Phone	_____
Point of Contact Email	_____

2. What is your organization's Mission and Vision?

3. What is your organization's service area and the populations it serves?
Please include zip codes served if applicable.

4. Describe your organization's experience with financial literacy, empowerment, coaching or counseling.

Section 2. Partnership types

All counseling is currently taking place virtually. All partners will be assigned a lead counselor who will work solely with that partner's clients. Please select the type of partnership that meets your organization's needs.

- A Referral Partner will provide a warm handoff for the clients in their programs to the FEC program. Staff at Referral Partners will attend an information session to fully understand the work of the FEC. A counselor will be assigned to each referral partner.
- A Co-Location Partner will provide a regular work space for a Financial Counselor and will provide the counselor with general office supplies, equipment (office or private meeting space, Wi-Fi, copier access) and a point of contact for on-site issues or needs. Co-Location Partner staff will attend an information session to fully understand the work of the FEC. *Please note that while services are virtual, counselors will be assigned to co-location partners and/or can reserve designated times to serve co-location partner clients.*
- An Integration Partner will fully integrate the Financial Counselor into the work of its program. Clients will attend counseling sessions as key component of the integration partner's program. The Financial Counselor may or may not be co-located with the Integration Partner.

5. Describe any other similar partnerships to the three described above that your organizations has had in the past. Were these successful? What were the challenges?

6. How many clients would your organization refer to the FEC each year? Explain how you arrived at this number.

7. Please share any additional information about your organization or questions you may have about the FEC.

Section 3. Meeting Availability

8. Once your application is received, we will schedule a follow up meeting with your program, the FEC program manager and your assigned financial counselor to discuss program referral process and data. Are there any days or times that you cannot meet?