

## The Florida Senate Local Funding Initiative Request Fiscal Year 2021-2022

LFIR # 1697

1. Project Title Post COVID-19 Prosperity for Floridians 2. Senate Sponsor Jason Brodeur 3. Date of Request 02/05/2021 4. Project/Program Description Florida Prosperity Partnership, often referred to as FPP, is a 501(c)(3) non-profit coalition of more than 3,000 financial capability practitioners (those helping individuals to move from financial crisis to stability and on to prosperity) who prime serve low- and moderate-income individuals and households. The coalition is comprised of Florida-Ac, domestic and international organizations and practitioners representing non-profits, financial institutions, academia, government agencies, for-profit enterprises, and more, all committed to generating a collective impact. FPP will offer training, certifications, and capacity building efforts to these practitioners to perform hand-up (vs. hand-out) services related to international education, financial counseling, linancial social work, and free income tax preparation (FPP is the largest traine for these services in FL).  5. State Agency to receive requested funds  State Agency contacted? Yes  6. Amount of the Nonrecurring Request for Fiscal Year 2021-2022  Type of Funding  Operations  Total Project Cost for Fiscal Year 2021-2022 (including matching funds available for this project)  Type of Funding  Total State Funds Requested (from question #6)  150,000  7. Total Project Cost for Fiscal Year 2021-2022 (including matching funds available for this project)  Type of Funding  Total State Funds Requested (from question #6)  150,000  41%  Matching Funds  Federal  0 0%  State (excluding the amount of this request)  0 0%  State (excluding the amount of this request)  No  Fiscal Year  Amount  Specific Appropriation #  Proceeding Nonrecurring  Nonrecurring  Nonrecurring  Programment  Amount  Specific Appropriation #  Proceeding Nonrecurring  Nonrecurring Appropriation #  Proceeding Nonrecurring  Proceeding Nonrecurring Nonrecurring  Proceeding Nonrecurring Nonrecurring  Proceeding Nonrecurring Nonrecurring  Proceeding Nonrecurr								
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b. Describe the source of funding that can be used in lieu of state funding.  FPP's business has grown significantly with COVID-19 and the resulting economic crisis.  Financial institutions are helping, but the need to grow quickly has resulted in this request.	a. If yes, indicate n b. Describe the sou  FPP's business has	onrecurring amou	int per year.  at can be used  y with COVID-1	9 an	eu of state funding.	mic crisis.	]	



Yes

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<ol><li>Has the entity requesting this project received any</li></ol>	federal assistance related to the COVID-19 pandemic?
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If yes, indicate the amount of funds received and what the funds were used for.	
PPP funds for salaries	

### 11. Details on how the requested state funds will be expended

Spending Category	Description	Amount		
Administrative Costs:				
Executive Director/Project Head Salary and Benefits	CEO salary (portion of)	20,000		
Other Salary and Benefits		0		
Expense/Equipment/Travel/Supplies/ Other	Office equipment/supplies (portion of)	2,000		
Consultants/Contracted Services/Study	Certifications for up to 200 Financial Capability Practitioners across the state (\$250 portion of \$295 fee - \$45 from the practitioner to ensure buy-in and engagement) as Certified Practitioners in Financial Capability	50,000		
Operational Costs: Other				
Salary and Benefits	Director of Partner Engagement (portion of)	40,000		
Expense/Equipment/Travel/Supplies/ Other	Software/online learning and distribution services (portion of)	12,000		
Consultants/Contracted Services/Study  Contracted services for accounting services, graphics and web design, social media, video editing, and training assistance (portion of)		26,000		
Fixed Capital Construction/Majo	r Renovation:			
Construction/Renovation/Land/ Planning Engineering		0		
Total State Funds Requested (m	ust equal total from question #6)	150,000		

### 12. Program Performance

### a. What specific purpose or goal will be achieved by the funds requested?

The goal of this hand-up initiative is to reach 150,000 Floridians that are in poverty or are asset limited, income constrained, and employed with financial capability services by partners (including financial education training, counseling, social work, and income tax preparation) that FPP educates and supports with capacity building services in hopes of moving residents from entitlement programs to self sustainability and on to prosperity.

### b. What activities and services will be provided to meet the intended purpose of these funds?

FPP will offer training and capacity building efforts for more than 3,000 financial capability practitioners (those helping individuals to move from financial crisis to stability and on to prosperity) to perform hand-up services related to financial education, financial counseling, financial social work, and free income tax preparation (FPP is the largest trainer for these services in FL - well over 800 people trained for this tax season alone, with the average volunteer bringing \$48,000 back to the state from the federal government. They will bring back almost \$40 million in 2021 - with the average income of those they are preparing taxes for, in past years, at just over \$26,000).

### c. What direct services will be provided to citizens by the appropriation project?

Financial education, financial counseling, financial social work, and free income tax preparation (FPP trains more volunteers and employees than any other organization in FL for these services for volunteers and employees of nonprofits large and small - from major United Ways to small community nonprofits).

d. Who is the target population served by this project? How many individuals are expected to be served?



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The coalition will manage a program that will allow for 150,000 ALICE households (or below – those under the Federal Poverty Level) in all 67 counties of Florida to access well trained volunteers and employees of nonprofits across Florida for financial capability services. ALICE is an acronym, used by United Way of Florida, that stands for Asset Limited, Income Constrained, Employed — households with income above the Federal Poverty Level but below the basic cost of living.

e. What is the expected benefit or outcome of this project? What is the methodology by which this outcome will be measured?

The outcome will be to help 150,000 ALICE Floridians with financial capability services by partners (including financial education training, counseling, social work, and income tax prep). A survey of FPP partners at the conclusion of the funding cycle to verify these numbers.

f. What are the suggested penalties that the contracting agency may consider in addition to its standard penalties for failing to meet deliverables or performance measures provided for the contract?

FPP is well positioned to take this project on as it represents over 3,000 financial capability practitioners across the state (all 67 counties represented) - many of whom are already offering services to those who need to be reached. FPP can agree to refunding a portion equal to \$1 for each person not reached based on a survey of its partners. Therefore, FPP's services will reach at least 150,000 Floridians with financial capability services by its partners with full funding of request.

13. The owners of the facility to receive, directly or indirectly, any fixed capital outlay funding. Include the relationship between the owners of the facility and the entity.

Not applicable	
140t applicable	



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14. Requestor Contact	ct Informat	iion				
a. First Name	Bill Last Name Mills					
b. Organization	Florida P	Florida Prosperity Partnership				
c. E-mail Address	Bill@Flor	Bill@FloridaProsperityPartnership.org				
d. Phone Number	(321)209	(321)209-4377 Ext.				
15. Recipient Contac	t Informati	on				
a. Organization	Florida P	rosperity Partner	ship			
b. Municipality ar	d County	Statewide				
c. Organization T	/ре					
□For Profit Entity	/					
☑Non Profit 501	(c)(3)					
□Non Profit 501	(c)(4)					
□Local Entity	□Local Entity					
□University or C	□University or College					
□Other (please	specify)					
d. First Name	Bill		Last Name	Mills		
e. E-mail Address	Bill@FloridaProsperityPartnership.org					
f. Phone Number	(321)209-4377					
16. Lobbyist Contact Information						
a. Name	Georgia McKeown					
b. Firm Name	GA McKeown & Associates					
c. E-mail Address	georgia@gamckeown.com					
d. Phone Number						