



## Money Habitudes Certified Facilitator Initiative 2023 - Pilot Frequently Asked Questions

**What is new and exciting with Money Habitudes for 2023?**

**Money Habitudes (MH) is growing! The company needs to expand its reach and ensure consistent use of the MH suite of products. To achieve this, a limited number of Certified Facilitators (think: “ambassadors”) will be trained to represent the company and be a trusted source of MH application in their community. These new ambassadors/facilitators will conduct industry-tailored training for people who will be using MH with those they serve.**

For example: Money Habitudes (MH) gets a request by an organization to train its team on how to use the MH tool with their clients. MH sends you - the Certified Facilitator - *who is familiar with that industry*, to go to the organization and facilitate the training with their team. The newly trained team members would then be MH Program Practitioners, using MH with their clients.

This could be with a company to train its employees, an organization with its volunteers, a department with its coaches, a base with their PFCs, a clinic with its therapists, etc., working in a business-to-business (B2B) capacity.

**What does it mean to be a “Certified Facilitator” with Money Habitudes?**

The Money Habitudes team seeks to certify practitioners at two different levels:

*Money Habitudes Certified Facilitator* - This select group of skilled professional Facilitators will serve for 12 months as an ambassador for the Money Habitudes suite of products! The time has arrived for Money Habitudes products to be shared with others at the “next level,” with more consistency, and Certified Facilitators will play a huge role making this happen in a business-to-business (B2B) capacity! Intrigued? Learn more on Friday, April 28, at the [MHCF Information Session](#) on how the training for this cohort will roll out

*Money Habitudes Program Practitioner* - Certified Facilitators will then share Money Habitudes with Program Practitioners via a business-to-client (B2C) set-up to help them develop a strong working knowledge of the suite of MH products! The goal is to touch more lives with the MH suite in more consistent, effective ways! The Certified Facilitators will help make this happen because they will be equipped, and then equip others, with the “what,” “why” and “how” of the Money Habitudes suite! (This service will be available for purchase starting in August 2023)

## What is the time commitment to become a Money Habitudes Certified Facilitator?

Think of the total time commitment in two phases:

- a. *Getting Certified* - 25 to 30 hours total in July 2023, with synchronous group learning sessions in Zoom, and individual work to prepare for upcoming sessions.

Check out the full schedule for Money Habitudes Certified Facilitator candidates here:

### **MH Certification Program Schedule**

7 sessions - July 6, 11, 13, 18, 20, 25, 27  
(2hr sessions - 3pm to 5pm EST)

Feedback session August 2023 (TBD)

Monthly Conversation sessions (TBD)

1 year feedback session August 2024 (TBD)

- b. *After Becoming Certified* - MH Certified Facilitators will commit to a one-year, renewable agreement with Money Habitudes to perform a minimum of 36 hours of 1099 work for 12 months (projected, not guaranteed), through the end of August 2024, averaging one 3-hour learning event monthly.
- c. This commitment also includes facilitation of at least one Monthly Conversation (paid), and participation in some scheduled monthly Money Habitudes Conversations sessions (unpaid).

## What qualifications is Money Habitudes looking for in a Certified Facilitator?

Past exposure to the Money Habitudes suite of products (print and online versions) is a good start! Ideal candidates will also have experience helping others build financial capability (more than just the traditional financial literacy class), and tailoring approaches to money management that are driven by client values and needs.

Strong candidates will also have facilitated and designed interactive learning opportunities for groups (more than traditional “presentations”).

The selection team will consider physical location, industry, population, and area of professional focus to ensure there is a broad spectrum of facilitators to meet the needs of our clients.

### **What is the cost associated with the pursuit of the Money Habitudes Certified Facilitator Initiative pilot program?**

The pilot program is free for all selected Money Habitudes Certified Facilitators! The projected future cost to attain the Certification is approximately ~\$3500.00.

OK . . . but what's the catch? Because the pilot program has no cost associated with it, there is an expectation of engagement for all session dates, and a completion of all required prep work, for candidates to become a Money Habitudes Certified Facilitator. Engagement includes virtual connection using a desktop PC or laptop (tablets and smartphones are not desirable for virtual engagement), and employing video and audio capabilities during all virtual sessions.

Yes, it will be like we are in the same room, learning together!

### **What are the important dates for the Money Habitudes Certified Facilitator initiative?**

- **Friday, April 28, 2023** - Money Habitudes Certified Facilitator Initiative Information Session

Register here: [MH Information Session](#)

- **Friday, April 28, 2023** - Application process opens

- **Monday, May 15, 2023** - Application process closes

- **Thursday, June 15, 2023** - Selections for the Money Habitudes Certified Facilitator Initiative pilot program are announced

- **Thursday, June 22, 2023, 3:00 p.m.** Eastern - Orientation and Technology Check for all selected Money Habitudes Certified Facilitator Initiative pilot program candidates

- **Thursday, July 6, 2023** - Welcome Session, the first of a month of scheduled synchronous virtual sessions in the Zoom learning environment for MHCF candidates

### **What additional details do Money Habitudes Certified Facilitator candidates need to know?**

The candidates will each receive an administrator account on the Money Habitudes Online portal. All candidates for the Money Habitudes Certified Facilitator role will also receive the entire suite of Money Habitudes print and digital products, a value of approximately \$150 (products include hard copy and PDF versions of *The Money Habitudes Professional Guide* and *Bringing Money into the Conversation*). In addition, 4 decks of Money Habitudes cards and an administrator online assessment account are included.

Candidates, as part of their journey toward Certification, will complete at least one (1) Money Habitudes assessment with a client or prospect as part of their preparation.

Candidates will also be required to complete a survey at the completion of the Facilitator Certification initiative, participate in a virtual feedback session on the Certification process, and also provide

thoughtful feedback at the end of the one-year agreement to help improve the MHCF initiative for the future.

**What will the partnership arrangement look like after the MHCF Certification is completed?**

Hopefully, a partnership with mutual benefit! Although Certified Facilitators will not be full- or part-time members of the MH professional team, they will serve for one year in a 1099-NEC capacity with Money Habitudes!

Contract work during the year will arrive either a) through MH to the Certified Facilitator, or b) through the Certified Facilitator to MH. Specific details on these two different avenues for client engagement will be discussed during the Information Session (register at: [MH Information Session](#)). MH Certified Facilitators will be compensated at a rate of \$225 per virtual training session (~3hr). If travel is required, expenses will be covered.

The only stipulation for MH Certified Facilitators is to not “upsell” their own products and services while representing Money Habitudes in this role.

**If I don’t get selected or am unable to participate in the Summer 2023 cohort, will there be more opportunities to become an MH Certified Facilitator in the future?**

That is the plan! The goal is to offer additional MH Certified Facilitator cohorts in the future. The offerings will be driven by demand from the marketplace, and the impact generated by the initial round of MH Certified Facilitators. Continuous improvement will be key!