



NEFE Research Funding Grant Eligibility Requirements Checklist

Researcher

- At a minimum, the principal investigator has a master's-level degree in a discipline relevant to the research and the larger research team has at least one member with a terminal degree.
- The principal investigator is affiliated with a U.S. nonprofit college, university, research organization, or other 501(c)(3) nonprofit organization.
- If the research involves human subjects, the principal investigator will ensure the project gains approval or exemption from the institutional review board at the affiliated organization.
- The principal investigator has no conflicts of interest and ensures any additional members of the research team also are free from conflicts of interest.

Organization

- The research will be conducted at an organization that has been designated tax exempt under the Internal Revenue Service Code Section.
- The organization does not discriminate on the basis of age, color, disability, marital status, national origin, race, religion, sex, sexual orientation or veteran status.

Project

- The research question requires rigorous empirical or theoretical analysis.
- The research will be of the same quality exhibited in scholarly academic journals.
- The proposed project outcomes are impactful to the field of financial well-being and are directly relevant to the financial well-being of the public.
- The scope is domestic (i.e., the proposed project involves the direct study of U.S. systems, households and individuals).
- The project does not include the development, execution, evaluation, expansion or administration of specific programs, courses, curricula or other products.
- The project does not have commercial or proprietary elements.

Funding Priorities

All NEFE funded research must include **at least one** strategic priority (access, quality, and/or impact), **at least one** system consideration (K-12 and/or post-secondary), propose a level of incorporation, and be grounded in our personal finance ecosystem.

- **Access:** Pathways to effective financial education
- **Quality:** Rigorous, relevant and responsive financial education

- **Impact:** Systemic, systematic and/or generalizable outcomes of financial education

More information on NEFE's funding priorities can be found at:

<https://www.nefe.org/research/get-funding/funding-priorities.aspx>.

More information on NEFE's Personal Finance Ecosystem can be found at:

<https://www.nefe.org/initiatives/ecosystem/default.aspx>

NEFE's Vision:

NEFE envisions a nation where everyone has the knowledge, confidence and opportunity to live their best financial life.

NEFE's Mission:

NEFE champions effective financial education. We are the independent, centralizing voice providing leadership, research and collaboration to advance financial well-being.

<https://www.nefe.org/research/get-funding/eligibility.aspx>.