



CONFERENCE ON VOLUNTEERING AND SERVICE

**JUNE 27-29, 2016**

# Engaging Volunteers in Economic Opportunity Programs

Points of Light \* HandsOn Network \* generationOn \* Corporate Institute \* AmeriCorps Alums

Convened by:



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# Objectives

- By the end of this session participants will:
  - Explore opportunities to engage volunteers in economic opportunity programs
  - Identify appropriate roles for volunteers in delivering various financial capability services
  - Determine key program elements for an impactful volunteer economic opportunity program

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# Introductions



**Melissa Grober-Morrow**

Director, Savings & Financial Capability  
CFED



**Dominique Derbigny**

Senior Program manager, Savings & Financial Capability  
CFED

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# Who We Are

**Our mission** at CFED is to make it possible for millions of people to achieve financial security and contribute to an opportunity economy.

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# Our Work



We **push to expand** innovative practical solutions that empower low- and moderate-income people to build wealth.



We **drive policy change** at all levels of government.



We **support the efforts of community leaders** across the country to advance economic opportunity for all.

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# Participant Introductions

- Please share the following:
  - Name, Organization, Role
  - What you are hoping to learn from this session
- Please answer the following questions:
  - Are you currently offering an economic opportunity program, or are you considering offering one?
  - If you have an existing program, how are you currently using volunteers to support it?

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# Volunteer Impact

- Take a minute to think of a time in which you felt like your volunteer service was most impactful. What was it about the opportunity that made it impactful?
- Share your response with a neighbor.

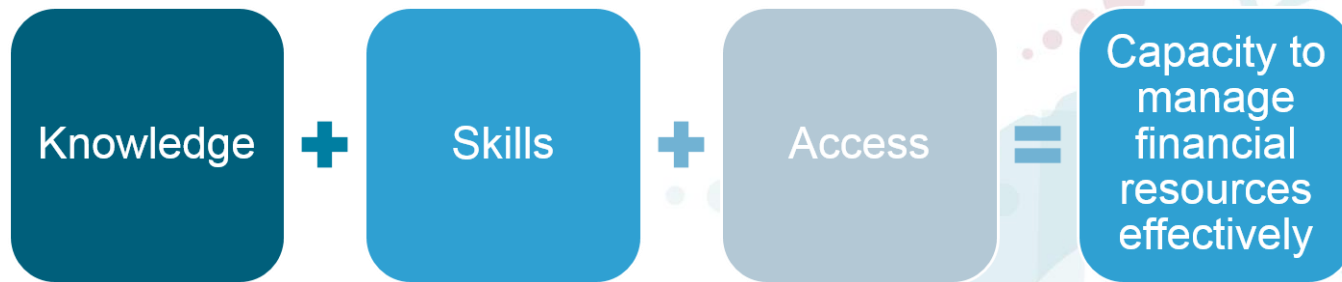
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# Financial Capability

- The capacity, based on knowledge, skills, and access, to manage financial resources effectively.



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# Financial Capability Services

- Financial Education
- Financial Coaching
- Financial Counseling
- Access to Safe and Affordable Financial Products
- Free Tax Preparation Assistance
- Credit Counseling
- Credit Building
- Access to Federal and State Benefits
- Incentivized Savings Programs
- Asset Ownership Programs

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# BUILDING FINANCIAL CAPABILITY

A Planning Guide for Integrated Services

Prepared by CFED under the ASSET Initiative Partnership for the Administration for Children and Families at the US Department of Health and Human Services

GSA Schedule Contract GS-10-F-0177L Order No HHSP233201200674G

Reader suggestions about *Building Financial Capability* are welcome. These may be sent to [PlanningGuide@cfed.org](mailto:PlanningGuide@cfed.org).



ADMINISTRATION FOR  
**CHILDREN & FAMILIES**



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# Volunteer Roles in Economic Opportunity Programs

- Free tax preparation programs (VITA/TCE)
- Financial education
- Financial coaching
- Access to federal and state benefits

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# Volunteer Recruitment and Matching

- What are the characteristics and skills of an effective volunteer in your program?
- How long and how often do you need volunteers?
- How will you train volunteers?

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# Structures for Effective Economic Opportunity Volunteer Programs

- Make volunteering social
  - Team-based
  - Orientation and reflection
- Offer leadership opportunities
- Demonstrate impact

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# Structures for Effective Economic Opportunity Volunteer Programs

- VITA (New York Cares model)
  - Establish a set schedule for teams of volunteers
  - Assign a team leader to each team
- Financial education
  - Pair volunteers to work in small groups with clients to impart financial knowledge

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# Structures for Effective Economic Opportunity Volunteer Programs

- Financial coaching
  - Pair volunteers to provide group coaching to several clients and empower clients to coach each other
- Access to federal and state benefits
  - Set up teams to provide assistance with a team leader

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# Program Design Activity

- Think about one economic opportunity program you would like to start in your community or that you currently support. Brainstorm the program elements and structure needed to design a high impact program for both volunteers and clients. (5 minutes)

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# Program Design Activity

- Participants work individually to complete the program design worksheet. (10 minutes)
- Participants will pair up with a neighbor to get feedback on their plan, and then switch to provide feedback on their partner's plan (5 minutes each partner):
  - *What do you like about the plan?*
  - *What is missing?*

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# Next steps

- Share with someone next to you the first thing you will do to implement your economic opportunity program when you get back to your organization.

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# Q&A

What questions do you have?

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# Thank you!

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