

Steps to Design a Volunteer Economic Opportunity Program

Use this worksheet to begin planning for your volunteer economic opportunity program. This worksheet will help you identify the type of program you want to offer, and determine some of the key program elements needed to create an impactful program.

STEP 1: NEEDS ASSESSMENT

If you are interested in creating a new economic opportunity program, or would like to offer new services through an existing program, start with an initial needs assessment to help you identify which services would be most impactful for your community. If you currently offer an economic opportunity program but are exploring how to utilize volunteers in service delivery, skip ahead to **STEP 4**.

Question	Response
What are the current unmet needs in your community?	
What are you trying to accomplish? What is the purpose of the program?	
What are the benefits to the community of establishing an economic opportunity program?	
What are the potential benefits to volunteers?	
What are the potential benefits to clients?	

STEP 2: TARGET POPULATION

Who do you seek to serve with this program? Consider the demographics of the target population you will generally serve (e.g. employed or unemployed, education, age, race/ethnicity, income level, etc.).

Question	Response
Describe your target population.	
How many people will you serve?	

STEP 3: FINANCIAL CAPABILITY SERVICES

Consider why the client population would be seeking the services offered by your program. Where are clients in their current financial lives? How can your volunteer economic opportunity program help them to meet their financial needs? There are tools available in section one of CFED's [Building Financial Capability: A Planning Guide for Integrated Services](#) that can help you identify and prioritize the financial needs of your target population.

Question	Response
What financial capability services would best meet the needs of your clients?	
What experience does your organization have in delivering these services?	
Who are the partners in the community that need or currently deliver economic opportunity programs?	

STEP 4: VOLUNTEER NEEDS

Volunteers can play a critical role in delivering financial capability services as part of economic opportunity programs. Consider the roles you want volunteers to play based on the services you plan to (or currently) offer for your target population.

Question	Response
What volunteer roles are needed to employ your program (e.g. VITA sites need tax preparers, greeters / screeners, site coordinators, etc.)?	
What skills are needed for each role?	
How and where will you recruit volunteers?	
How many volunteers are needed?	
What is the time commitment expected of volunteers (e.g. one time experience, ongoing, weekly, monthly, etc.)?	
How will volunteers engage with clients (e.g. one-on-one, small groups, large groups, etc.)?	
What training will volunteers need and how will you provide this training?	

STEP 5: VOLUNTEER JOB DESCRIPTION

The next step is to think through the activities you want your volunteers to perform. One way to do this is by creating job descriptions for each volunteer role in the economic opportunity program. The attached volunteer position description template is available for you to draft your job descriptions. Before you begin your draft, think through the following questions.

Question	Response
What are the “must have” knowledge, skills, or experiences required of volunteers in each role?	
What are the “like to have” knowledge, skills or experiences preferred of volunteers in each role?	