

VISTA Assignment Description (VAD)

Title: Financial Empowerment VISTA
Sponsoring Organization: United Way of the Dutchess-Orange Region Project Name: United Way of the Dutchess-Orange Region Project Number: 20VSANY001 Project Period: 11/10/2019 - 01/02/2021
Site Name (if applicable):
Focus Area(s) Primary: Capacity Building Secondary:

VISTA Assignment Objectives and Member Activities

Goal of the Project: The Financial Empowerment VISTA will create future opportunities for capacity building and expansion of the CASH Coalition. They will expand the capacity of partner nonprofits devoted to creating pathways out of poverty with regards to housing, employment and reducing other barriers that struggling families face. Their position will be focused on expanding volunteer networks to support the Financial Stability Project. The VISTA will recruit volunteers to expand local economic opportunity programs to increase the number of economically disadvantaged individuals with improved financial knowledge so that they are able to move out of poverty and on to a long-term path of financial stability.

Objective of the Assignment (*Period of Performance: 3/15/2020-3/15/2021*)

Identify and formulate partnerships with existing programs that provide tax preparation, financial education/coaching, job training/placement services and other financial stability programming.

Member Activity: 1.Understand the financial education/coaching and job training/placement needs of economically disadvantaged individuals and families in the community. 2.Research existing programs that provide tax preparation, financial education/coaching, job training/placement and/or other skill development services.3.Identify companies and organizations willing to engage their employees as volunteers that would support project goals through skills-based or direct service efforts.4.Develop relationships with community leaders and organizations that could advance project goals.5.Create a community asset map that can be updated throughout service.

Objective of the Assignment (Period of Performance: 3/15/2020-3/15/2021)

Evaluate the effectiveness while establishing partnerships and setting long-term goals for existing programs that provide tax preparation, financial education/coaching, job training/placement and/or other skill development services. Significantly expand the services available to clients as a result of capacity-building activities.

Member Activity: 1. Assess tax preparation, financial education/coaching, job training/placement and/or other skill development services programs. 2. Conduct outreach to ensure each program is relevant, useful and attended by eligible participants. 3. Produce assessments in a written format (e.g. report). 4. Communicate results of evaluation to community partners. 5. Offer customized coaching and expertise to nonprofits identified as in need of capacity building services to enhance their service deliver mechanisms.

Objective of the Assignment (Period of Performance: 3/15/2020-3/15/2021)

Recruit and train volunteers to strengthen and expand tax preparation, financial education/coaching, job training/placement and other critical financial programs.

Member Activity: 1. Suggest actions that United Way and its community partners (including businesses and local service programs) could take to leverage volunteers to expand the scale, reach, efficiency or the effectiveness of programs that provide tax preparation, financial education/coaching, job training/placement and/or other skill development services. 2. Develop an outreach plan for target beneficiaries/ participants. 3. Discuss recommendations with United Way and community partners (including businesses and local service programs) and refine for implementation. 4. Implementation phase; help United Way and community partners implement new and expanded programming. 5. Ensure volunteer-led and supported initiatives have a steady supply of competent and engaged volunteers by building each partner's capacity to recruit, manage and retain volunteers, while aligning with a long-term sustainability focused strategy focused on volunteer leadership and empowerment.

Objective of the Assignment (Period of Performance: 3/15/2020-3/15/2021)

Develop a financial literacy prevention based module for financial institutions to implement, while training and empowering volunteers for future program implementation as well as enhancing Days of Sharing, service coordination and crisis intervention programming.

Member Activity: 1. Identify interested financial institutions who aim to provide community education. 2. Determine what crucial financial issues the community is interested in becoming educated on. 3. Develop a curriculum and implementation plan based on the results. 4. Provide oversight and logistics of the financial stability workshops.