



LIFEBRIDGE FINANCIAL LITERACY COORDINATOR

LifeBridge AmeriCorps is a non-profit organization dedicated to improving the financial well-being of economically disadvantaged individuals and families across the state of WV. Our mission is to empower individuals with the knowledge and resources needed to achieve financial stability and independence.

POSITION OVERVIEW

As the LifeBridge Financial Literacy Coordinator at your site, you will play a crucial role in assisting economically disadvantaged adults in gaining financial literacy skills, providing information and referrals to individuals seeking financial resources, and recruiting volunteers to support your site's mission. The numbers reflected below are totals for the entire service year, not per month. If a member reaches their requirement for each key responsibility, we still encourage members to continue to aim to reach bigger and higher numbers. Members will be evaluated by LifeBridge staff on their program-specific responsibilities during their mid-year and year-end member evaluations. If a member does not reach their program-specific goals, it could influence allowing the member to serve any future terms with the LifeBridge AmeriCorps program.

KEY RESPONSIBILITIES

Financial Literacy Assistance (50 adults):

Members may use one of the following two curriculums to execute their financial literacy requirements, Money Smart or Your Money Your Goals. Below are links to their websites with materials that may be printed or ordered. If a site has a curriculum already in place that they use, the member may use it in place of the one's we suggest. Financial literacy materials and curriculum can vary from site to site and therefore we invite members to find what works well for them and their community.

[FDIC: Money Smart – A Financial Education Program](#)

[Your Money, Your Goals | Consumer Financial Protection Bureau \(consumerfinance.gov\)](#)

Implementation – Members may reach their goal of 50 individuals by performing any of the following for a minimum of 30 minutes for each session:

- Conduct one-on-one financial literacy sessions with economically disadvantaged adults.
- Create and deliver tailored financial education workshops and resources.
- Use the provided two curriculums either in a 1:1 or group setting.
- Bring in outside professionals to host workshops/webinars on the members behalf.
- Complete free tax assistance for adults through VITA (Volunteer Income Tax Assistance)

Data Collection & Reporting – Members are provided surveys to use for their data collection and reporting. All surveys can be found in the member binder which is located on our Link Tree ([LifeBridge WV | Instagram, Facebook | Linktree](#)). Members will track and report all NEW and Returning individuals who receive financial literacy services. To be counted as NEW individual, they cannot have received financial literacy services of any kind at any other point during your term of service. Individuals receiving services will fill out a pre and post survey to determine if the individual had a gain in financial knowledge. Members will log each individual served in the LifeBridge America Learns Impact Suite. All surveys will then be uploaded as supportive documentation to numbers entered on their monthly report. Please be sure to verify the information on the surveys are the same as what you reported on your monthly report.

Information and Referrals (500 individuals):

Members will serve as a resource hub and will provide information and referrals to 500 NEW individuals seeking assistance and support to become more financially secure.

Implementation – Members will provide information and/or referrals on a 1:1 basis and or in group/community settings. The ways in which members can carry out this requirement can vary from site to site and therefore we invite members to find what works well for them and their community.

- Connect individuals with relevant services, programs, and resources necessary to reach financial security.
- Maintain accurate records of referrals to ensure non-duplication of services. This will include tracking what information and/or referrals are provided to each individual served.
- Maintain confidentiality at all times.

Data Collection & Reporting – Members are provided logs to use for their data collection and reporting. All logs can be found in the member binder which is located on our Link Tree ([LifeBridge WV | Instagram, Facebook | Linktree](#)). Members will solely report NEW information and referrals only. To be counted as new individuals, they cannot have

received a referral at any other point during your term of service. To ensure there are no duplications of services, members will create a Client Identifier, when necessary. Some sites have a system (i.e. WV 211 /Apricot/etc.) that will provide clients a tracking number that is not related to their name which may be used to run reports and use as reference when completing monthly reports.

Volunteer Recruitment (15 volunteers):

Members will bring in 15 NEW volunteers to serve with them either on service projects and/or site-specific related activities.

Implementation – Volunteers can be counted if they help with any AmeriCorps allowable activity for a minimum of 15 minutes. Volunteers do not have to be consistent/returning volunteers to be counted. Returning volunteers are encouraged.

- Develop and execute a volunteer recruitment plan to expand your sites team of dedicated volunteers.
- Collaborate with local organizations, schools, and community groups to identify potential volunteers.
- Conduct a mini (15 minute or less) orientation for new volunteers, ensuring they are informed of their activities/tasks and understand the dos and don'ts of your site and our LBA Program policies in which they will need to be aware during their time of service.

Data Collection & Reporting – Members are provided surveys to use for their data collection and reporting. All surveys can be found in the member binder which is located on our Link Tree ([LifeBridge WV | Instagram, Facebook | Linktree](#)). Volunteers will fill out a volunteer survey after they complete their assigned tasks/activities. All surveys will be uploaded with their monthly report as supportive documentation to numbers entered on their monthly report. Please be sure to verify the surveys and information reported on your monthly report are true and accurate.

Service Projects (a minimum of 3):

Members will be expected to execute 4 service projects during their term of service. Dates of each project will be provided during the member's orientation. Projects will be around the following dates: Aug. (member orientation), Sept. 11, MLK Day (Jan. 16th), and AmeriCorps Week (usually 3rd week of March).

Implementation – LifeBridge staff plans program wide projects for each required project. Projects will be carried out by each member at the site level to ensure there are no prohibited activities being performed

during projects. LB Staff will create a marketing packet for each site to use to help boost the project into the community, making it more successful.

- Lead and participate in community service projects.
- Collaborate with local partners, schools, and organizations to organize and execute service initiatives.
- Engage volunteers and program participants in these projects to strengthen community bonds.

Data Collection & Reporting – Members will be provided with a data collection tool (i.e. google form/paper log) to help track project specific data to use when reporting on their monthly report. All will then be submitted with their monthly report. Please be sure to verify the numbers on your data collection tool are the same numbers as ones reported on your monthly report.