

2014 Pro Bono - Six Step Plan of Work



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Vice:	TBD	

Committee Members:

Steve Gilbertson	Alexis Cress	Jason Plank	
Melanie Hardie	Anders Haugen	Dennis O'Hearn	
Lauri Salverda	Dana Hornquist		

FOSTERING TRUST

We will foster trust by...

- Actively participating in committee meetings, a combination of phone and in-person meetings
- Taking on commitments central to the mission of the group
- Following through on the commitments we make in the timeframe established and reporting our progress to the group
- Encouraging open dialogue and providing, soliciting, and receiving honest feedback
- Being supportive of the various projects and empathetic about the unique Pro Bono passions of each committee member

CREATING VISION

Our vision is to...

- Be a liaison between people in need and/crisis and the Pro Bono Volunteers of FPA-MN, emphasizing the particular initiatives about which our committee members and our Pro Bono Volunteers are passionate
- Develop programs that meet the goals of our partners in serving those in need and documenting them so they can be transferred to other organizations
- Provide meaningful opportunities to give and receive solid, objective financial education
- Demonstrate to the non-profit community and the community at-large that FPA is the Heart of Financial Planning

Key Initiatives for 2014

- **Develop on additional Pro Bono partnership (by September, 2014)**
 - Continue to explore potential partnership with ALS Association
 - Revisit conversations with MajorHOPE for those directly impacted by cancer
 - Work to potentially plug out-state FPA members into working with military veterans as need arises
 - Follow-up with partners from Resource Fair at Financial Planning Day, including Neighborhood House, Family Means, EMERGE, etc.
 - Develop/adapt curriculum utilizing existing curriculum (Tubman, Major Hope, resources from other FPA chapters)
 - Get MOU in place to define parameters of partnership

- **Acquire/Engage Committee Members (by October, 2014)**
 - Add one new committee member per quarter utilizing a range of tactics
 - Survey question soliciting interest in Volunteer Hub survey
 - Follow-up with interested individuals from Symposium
 - Solicit possible new committee members at New Member receptions and Chapter meetings
 - Approach committed, passionate Pro Bono volunteers about further engaging by utilizing 2013 Volunteer Hub data
 - Have each committee lead or co-lead an existing partnership or initiative within the committee
 - Work to have at least one face-to-face committee meeting per quarter
 - Develop and track goals as a committee with clear metrics for success (number of projects, people served, volunteer hours)
- **Engage and train/educate current and new FPA Pro Bono volunteers (by August, 2014)**
 - *Do a series of workshops throughout 2014 on Pro Bono topics for the FPA membership*
 - Work with Financial Education to continue to develop “Volunteer Hub” volunteer database
 - Do volunteer survey to “drill down” into interests
 - Organize volunteer database by interest, including one-on-one referrals from website
 - Appreciate volunteers in tangible ways, including recognition in newsletter, at Chapter meetings (pictures, on-screen, etc.)
 - Solicit project-specific volunteers in newsletter and at chapter meetings

DEVELOPING STRATEGY

Strategy	Target Date	Committee Member(s) Spearheading	Critical Success Factors Including (if applicable) Projected Revenue and Related Costs
AccountAbility Minnesota	Ongoing	Steve Gilbertson	<ul style="list-style-type: none"> • 1-to-1 FP sessions • Credit Report Reviews • Financial Workshops
MN Law Enforcement Memorial Association	Ongoing	Lauri Salverda	Continue working with the families of officers who have fallen in the line of duty
Financial Planning Day Event	October, 2014	Jason Plank Steve Gilbertson Melanie Hardie	<ul style="list-style-type: none"> • Coordinate event planning • Significant attendance growth
Volunteer/Member Education Initiative	June, 2014	San/Melanie/Steve/Others	<ul style="list-style-type: none"> • Quarterly education workshops to volunteers and possibly members • Speakers from partnership organizations • Intent is to educate volunteers and members as to the type of clients we help and their specific needs
Military Initiative	April, 2014	Steve Gilbertson San Asato	<ul style="list-style-type: none"> • Continue to Plug our members into opportunities such as Home for Our Troops and Operation Homefront.
Young Adult Mentoring Program	Ongoing	Steve Gilbertson Anders Haugen	<ul style="list-style-type: none"> • Expand 1-to-1 mentoring program
Individual Requests and Referrals from FPA website	Ongoing	San Asato Dennis O’Hearn Steve Gilbertson	Direct to volunteers and initial response within 24 hours

Develop one additional project, working to leverage an existing relationship of our members in an area where our members have a specific interest.	October, 2014	All	<ul style="list-style-type: none"> • 1-to-1 FP sessions • Financial Workshops
Acquire/develop pool of enthusiastic volunteers	Ongoing	All	<ul style="list-style-type: none"> • Organized universal database of volunteers interested in Pro Bono • Necessary training for volunteers • Volunteer appreciation event
Acquire/engage committee members	Ongoing	All	<ul style="list-style-type: none"> • One new committee member per quarter • Each committee member leads or co-leads a project
Resource List	Ongoing	Melanie Hardie	Review and update links for the FPA-MN Resource List

ENERGIZING ALLIANCES

Alliance	What do we want?	What do they want?
Community-Based Organizations (CBOs)	Opportunity to connect enthusiastic FPA volunteers to underserved individuals in need.	Their clients to receive financial education.
PR Committee/Government Relations	PR for Pro Bono projects, particularly FP Days; Connections with key legislators/government officials	Metrics on the work we are doing; Meaningful events to publicize that shows value of FPA
Membership/Member Services	Enthusiastic volunteers	Energized members, both new and existing
Financial Education	Organized database of enthusiastic volunteers to go to for projects	Organized database of enthusiastic volunteers to go to for projects
Career Development	Enthusiastic volunteers	Career experience/learning opportunities
Professional Issues	Connections with key legislators/government officials for Financial Planning Day, potentially as a headliner	

ACTIVATING TRANSFORMATIONS

- Each committee member will be engaged by leading or co-leading an initiative, whether or not it is a project, managing volunteers, being in charge of volunteer appreciations, etc.
- Meaningful new partnerships that align with the passions of our committee and FPA volunteers will be developed and implemented throughout the year, including a pipeline for future projects.
- The committee will have an organized database of Pro Bono volunteers with up-to-date information on volunteers, including their Pro Bono participation and interests.
- Volunteers will be recognized and made to feel appreciated in concrete ways by the Pro Bono committee 1) Appreciation event, 2) Recognition at chapter meetings, 3) Handwritten appreciation cards.)
- We will define goals with clear metrics for success as a committee which we will review throughout the year (people served, volunteer hours.)

MEASURING PROGRESS, ACHIEVING RESULTS AND RESETTING THE VISION

Strategy	Monthly Report of Achieved Progress	Current Action Item(s)	Person Responsible (Alliances?)	Deadline for Action
Financial Planning Day Event - At least 250 participants at event (October 31, 2014)				
Volunteer Appreciation Event - At least 60% of volunteers at event; partners in attendance as well; networking opportunity provided; volunteers feel appreciated; non-profit partners are able to recruit new volunteers for projects, plan to partnership with other committees to recognize their volunteers as well. (December 31, 2013)				
AccountAbility Minnesota – Continue to grow number of volunteers participating in the program, including the new “financial coaching” program that is being piloted this year – Quality over quantity in the work being done (May, 2014)				
Young Adult Mentoring Program – Begin next round of mentoring program, seeking 6-8 volunteers and adapting the program from what we have learned to have a higher mentee participation rate in the program (June, 2014)				
Tubman Center Program – Focus on Tubman West program – Start a new 6-week series and work to increase engagement of participants (in the range of 10-15 participants) (May, 2014)				
Volunteer Management Software (in conjunction with Financial Education Committee) -; New volunteer info is solicited and captured; Survey is done to existing Volunteer database; The tool is used to provide calendar of events and help track hours; reliable volunteer group grows (July, 2014)				
Volunteer training & Workshops to FPA Membership on Volunteer Topics - Volunteer and seminar participants complete required training and provide feedback that resources/materials met intended purpose. (August, 2014)				