**Penn Law Financial Literacy Project**

***2014-2015 Executive Board Application***

Please return the completed application with resume attached to Elisa Downey-Zayas ([elisak@law.upenn.edu](mailto:elisak@law.upenn.edu)) and Jessica Greer Griffith ([jgriff@law.upenn.edu](mailto:jgriff@law.upenn.edu)) no later than 5pm on Tuesday, March 18th, 2014. The completed application should be no more than 4 pages.

You will be notified of our decision by March 28th, 2014. If you have any additional questions about the Penn Law Financial Literacy Project or specific Executive Board positions, please feel free to reach out to Elisa and Jessica. Thank you for your interest in serving on the Penn Law Financial Literacy Project’s leadership team!

**1. Personal Information**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Class Year: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2. Executive Board Positions**

Which position(s) you would prefer:

Is there a position you would not accept?

For each role you are interested in, please explain why you would be a good candidate.

Do you have any other volunteer or leadership commitments?

**3. Experience**

Describe your previous experience with the Financial Literacy Project:

What motivated you to engage in the work of this pro bono project?

**4. Leadership and Vision**

What is your vision for the Financial Literacy Project? Consider what your goals are for next year, and how you think they can be accomplished. Do you have any specific strategies or new projects in mind?

What challenges do you anticipate as a board member and leader, and how do you think you will respond to those challenges?

Are there any other areas of expertise or contributions you feel you can bring to the board that have not been previously mentioned?

***2014-2015 Board Positions – FILLED***

Executive Director – Drake Glesmann

*The Executive Director* *will be responsible for leading the organization, sustaining its vision, overseeing the work of board members, maintaining relationships with community partners, building the project’s imagine on campus, and providing continuity from previous years. As part of these efforts, the Executive Director will set the agenda and schedule for the year, including any project related trainings and speaker events.*

*From an administrative perspective, the Executive Director* *will run board meetings, manage the FLP budget and submit budget/grant requests, manage the project’s website, and be responsible for revising and updating the project operations manual to ensure it accurately reflects the project’s goals and vision for the upcoming year.*

*With regards to recruitment and volunteer management, the Executive Director* *will be responsible for recruiting and selecting 1L representatives and training board members. To a lesser extent, he/she will also aid in recruitment/ volunteer coordination efforts and assist with the day-to-day operations of both projects as needed.*

*In general, his/her role will be more advisory and training-oriented. The Executive Director* *will meet individually with the co-directors of each project to ensure goals are being met, and will help out as required. The Executive Director’s primary responsibility, however, will be setting goals to further the mission of the project and ensuring that the entire Executive Board understands and implements the project’s vision, especially with regards to serving indigent and immigrant communities.*

*In order to protect institutional knowledge, respect relationships with community partners, and maintain continuity of vision and direction, the Executive Director* *for the upcoming year will normally be appointed internally from the current Executive Board. While extenuating circumstances may necessitate the election of an Executive Director from persons not currently in a leadership role, this is generally not a position that students should expect to run for unless already on the current Executive board.*

***2014-2015 Board Positions – VACANT***

co-Director of VITA (2 board positions available)

*The 2 co-Directors of VITA will manage and oversee the VITA program through such responsibilities as maintaining relationships with the Campaign for Working Families, maintaining relationships with ceiba, managing volunteers, organizing training sessions, obtaining feedback on the administrative side of the program, and working closely with the co-Directors of community Financial Literacy to holistically serve underserved and indigent communities in Philadelphia.*

*A majority of the co-Directors’ time will be spent managing volunteers and working with community contacts to meet mutually agreed upon goals. As such, this is a position that is administrative and scheduling heavy, and requires a relatively organized person who can manage their time well. The co-Directors of VITA should be personable, patient, and enthusiastic. Evidence of these traits should be described in the board application, as appropriate. The co-Directors of VITA will also help volunteers sign up for shifts, manage reimbursements for travel, record training records, and monitor volunteer hours (i.e., compliance with the minimum shift requirements).*

*While the individual responsibilities of each co-Director of VITA will need to be mutually agreed upon by both parties during the Executive Board Transition Process, the two roles can be approximately broken down into the following:*

* *co-Director of VITA – campaign for Working Families coordinator*
* *co-Director of VITA – ceiba coordinator*

*The campaign for Working Families coordinator will focus on managing and overseeing the VITA program’s operation at campaign for Working Families sites. Specifically, the coordinator will be responsible for maintaining consistent and open dialogue with our contacts at the campaign, scheduling basic and advanced trainings at the law school in December / early January with the Executive Director, managing administrative paperwork and volunteer certification documents, preparing an online training guide for those students wishing to complete the training online, communicating with volunteers regarding the online volunteerhub system used by the campaign, and encouraging volunteers to perform service hours at designated “underserved” locations. Additionally, the campaign for Working Families coordinator will be responsible for working with the ceiba coordinator and the co-Directors of community Financial Literacy to ensure FLP is achieving its vision of holistically serving indigent and underserved populations throughout Philadelphia.*

*The ceiba coordinator will focus on managing and overseeing the VITA program’s operation at ceiba sites. Specifically, the ceiba coordinator will be responsible for maintaining consistent contact with our partners at ceiba, setting goals and managing expectations for the year, planning “ceiba site days” during the fall and spring semesters (at least 2 during the fall, and at least 3 during the spring), and recruiting experienced FLP members to file prior year taxes at ceiba sites during the fall semester. In essence, the ceiba coordinator, along with the help and support of the campaign for Working Families coordinator, will work to encourage active volunteer efforts in serving some of Philadelphia’s most at-risk and in-need communities and help recruit volunteers who may have a particular interest in serving Philadelphia’s Hispanic communities. The Ceiba coordinator will work to engage not only with FLP volunteers, but also more broadly with the LLM population and groups such as LALSA to encourage Latino students at Penn Law to be involved with Ceiba’s work. While not necessarily a requirement, the ideal Ceiba coordinator is fluent or at least proficient in Spanish. Duties will also include helping volunteers to sign up for volunteer sessions, driving members to VITA sites if and when needed, organizing ZipCar transactions to ensure volunteers can arrive at volunteer events, and managing feedback that volunteers may have regarding logistics or administration.*

***Notes on Applying:***

*You may either apply generally to be a co-Director of VITA, or may apply for a specific coordinator position. Please note, however, that applying generally provides a better chance of ultimately being offered a board position. Regardless of which role you fill, both co-Directors of VITA must commit to at least FIVE volunteer sessions during the course of the tax season with the VITA program, with at least TWO done at underserved sites. These requirements mimic the requirements of all VITA volunteers, and the co-Directors of VITA will be expected to satisfy these at a minimum. If you do not legitimately believe you can meet these requirements, this is not an appropriate position to apply for.*

*Finally, the FLP Executive Board is structured to encourage current 2L leaders to stay on as senior members during their 3L years. If you are potentially interested in serving on the board during your 3L year in a senior role (e.g., Executive Director), please indicate that in your application.*

**\*\*BOARD MEMBER ADDENDUM AND COMPACT\*\***

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, agree to join the board of the Penn Law Financial Literacy Project as the co*-*Director of VITA. I agree to perform the duties of that position, as listed above and defined in the Penn Law Financial Literacy Project Operations Manual. If I have any questions about my specific duties or the requirements of my job, I will ask the currentco-Executive Directorsor current Director of VITA for assistance.

I agree to attend all board meetings, trainings, and volunteer sessions to the best of my ability. At a minimum, I agree to participate in five (5) volunteer tax preparation sessions at sites operated by the Campaign for Working Families or ceiba or another community partner, with at least two (2) of those sessions at traditionally underserved sites, as designated by the Executive Director. This contract also incorporates all of the requirements listed in the volunteer contract.

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Printed Name Signature

***2014-2015 Board Positions – VACANT***

Co-Directors of Community Financial Literacy (2 board positions available)

*The Co-Directors of Community Financial Literacy will manage and oversee the Community Financial Literacy Project through such responsibilities as maintaining relationships with community groups, managing volunteers, and organizing financial education events and trainings in undeserved, urban, and immigrant communities throughout Philadelphia. This position requires that the Co-Directors of Community Financial Literacy commit to attending financial literacy and educational programming sessions throughout the year, and manage independent projects students may be involved in with our community partners.*

*The Co-Directors of Community Financial Literacy will be expected to build upon the materials and institutional knowledge developed to expand the reach and scope of the program, and bring the community Financial Literacy Project into reality. As the leaders of a relatively underdeveloped project, the Co-Directors of Community Financial Literacy will need to take a hands-on approach to building the scope of this project and enhancing its impact on the community. We are looking for enthusiastic and creative applicants, who will be comfortable networking with community partners and student organizations to build relationships and expand the project.*

*Specifically, the Co-Directors of Community Financial Literacy will be expected to actively seek out an attorney to serve as a supervisor and community partner, and to help develop a curriculum, in conjunction with the supervisor, that combines legal principles and fundamentals of financial literacy. The Co-Directors of Community Financial Literacy will also execute education workshops and trainings, partner with the Co-Directors of VITA to offer holistic services for tax clients, and develop relationships with pro bono projects where synergies can be built (e.g., Veterans Assistance Project, Women’s Legal Assistance Project, Urban Ventures Project).*

***Notes on Applying:***

*Please note that while this is a specific board position, the Co-Directors of Community Financial Literacy will also serve on the Executive Board as a whole and help with the various facets of running this organization. At a minimum, this means that during busier seasons (e.g., the beginning of the tax season), the Co-Directors of Community Financial Literacy will be expected to assist the Co-Directors of VITA if, and when, needed.*

*Finally, the FLP Executive Board is structured to encourage current 2L leaders to stay on as senior members during their 3L years. If you are potentially interested in serving on the board during your 3L year in a senior role (e.g., Executive Director), please indicate that in your application.*

**\*\* BOARD MEMBER ADDENDUM AND COMPACT\*\***

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I agree to attend all board meetings, trainings, and volunteer sessions to the best of my ability. At a minimum, I agree to participate in any financial literacy and education sessions, and responsibly maintain the project’s professional contacts with community organizations.

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Printed Name Signature

**Toll Public Interest Center Pro Bono Project Leader Compact[[1]](#footnote-1)**

**2014 – 2015**

The Toll Public Interest Center’s Pro Bono Projects have a longstanding tradition of providing crucial services and resources to individuals and organizations of limited means. As you join this proud tradition of Penn Law Students at the vanguard of public interest and pro bono work, you are an ambassador for your project, TPIC, and the Law School at the local, national, and at times international levels.

We recognize that as leaders you engage in a wide array of tasks that may be hard to track. Therefore, we offer 80 blanket hours of pro bono credit for your work as a project leader.[[2]](#footnote-2) What TPIC offers to project leaders is in part contingent on completion of certain administrative requirements.

**To support you in leading pro bono projects, TPIC will do the following:**

* **Hours:** Offer 80 hours of pro bono credit as long as you meet the requirements listed, below;
* **Resources:** Supply a budget (approved by TPIC by the beginning of fall semester classes) to help with costs associated with your project’s service and provide you with designated workspace, which includes access to printing, photocopying, materials storage, and phone;
* **Guidance:** Provide training, support and assistance to help you develop and manage your project (e.g., volunteer recruitment, volunteer training and supervision, connecting with potential project partners, project planning, and checking and approving pro bono hours logs);
* **Troubleshooting:** Help with any issues that arise for your project once it is underway (e.g., need for additional volunteers or projects for existing volunteers, unresponsive volunteers, challenges with supervisors or partner organizations, and any other difficulties around decision making, leadership and management);
* **Formal Acknowledgment:** Recognition for leading a project at the end of the year and recognition for exceeding the pro bono requirement in the year you graduate.

**The Toll Public Interest Center requires you to:**

* **Plan & Budget:**
  + Submit a budget request to [jvisser@law.upen.edu](mailto:jvisser@law.upen.edu) by **June 1, 2014** (see budget template on the leader-only section of TPIC’s website);
  + Complete or revise a Project Operations Manual and submit it to [jvisser@law.upenn.edu](mailto:jvisser@law.upenn.edu) by **August 1, 2014**, including a volunteer compact to be signed by your members;
* **Evaluate Project:** 
  + Engage in ongoing evaluation of your project, its goals and objectives, and its ability to achieve those goals and objectives (see TPIC for assistance in crafting evaluation materials);
* **Provide Feedback (via three (3) individual surveys/responses):**
  + (1) in Spring 2014 after you are elected to a leadership position laying out your goals and expectations for the semester; (2) at the end of the Fall 2014 semester describing your leadership role and accomplishments and providing feedback on the success to date for the project; and (3) at the end of the Spring 2015 semester evaluating whether you have met your goals and expectations set out in your Spring 2014 survey, and providing feedback on the success to date for the project, feedback on the support and help provided by TPIC, and general feedback on all other matters related to your leadership and your pro bono project.
* **Attend Meetings:** 
  + Attend pro bono project leader general meetings (one in the spring and one in the fall) and at least one meeting per semester specifically between your project leaders and representatives from the Toll Public Interest Center. Please provide advance notice if you will not attend a meeting or an event for any reason;
  + Meet with fellow board members once per month at a designated meeting time mutually agreed upon by all members and shared with TPIC.
* **Communicate & Collaborate:**
  + Notify the Toll Public Interest Center immediately and in advance if any issue or event of any kind will prevent you from fulfilling your responsibilities in full and/or in a timely fashion;
  + Keep open lines of communication with fellow board members, TPIC, volunteers and organizational partners and communicate regularly and promptly with all project volunteers and supervisors;
  + Assign one member of your project to maintain the project’s webpage and ensure regular updates to website and social media.
* **Support Volunteers’ Compliance with Pro Bono Requirement:**
  + Run all advertisements and/or announcements offering pro bono credit through TPIC;
  + Work with TPIC to ensure all pro bono policies are being met (see TPIC website for full description of policies);
  + Offer volunteers pro bono credit only for pro bono service as defined by Penn Law. (If you are unsure whether something qualifies as pro bono service, please contact the Toll Public Interest Center BEFORE you offer credit);
  + Approve and sign pro bono log forms only upon careful review of responsible hours logging and after bringing any issues to TPIC;
* **Transition & Train Future Leaders:**
  + Plan and execute an effective transition process for the next board and comprehensively train incoming leaders.

**By my signature I affirm that I have read and understand the above information and I agree to take on the responsibilities of being a pro bono project leader. I also understand that failure to comply with any of these expectations may lead to forfeiture of leader privileges such as blanket hours, recognition, and ability to log hours for work other than pro bono legal service.**

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Project Leader Printed Name Project Name

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Signature Date

1. All of the policies and expectations listed in this document are described in greater detail in the “TPIC Policies for Student Leaders of Pro Bono Groups” document that will be provided to you during leader orientation and available on the leader-only section of TPIC’s website (<https://www.law.upenn.edu/publicservice/pro-bono/lawonly/student-project-leaders.php>). [↑](#footnote-ref-1)
2. We recognize that some leaders may go well above the 80 blanket hours. Leaders who exceed 80 hours may submit a log form for **only the hours they worked above 80**. If you intend to submit additional hours it is particularly important that you keep accurate time records. [↑](#footnote-ref-2)