



# The Oregon Money Management Program

*A little help can make a big difference . . .*

Financial security is more than simply having money to live on. It's also being able to understand and pay bills on time, manage credit, organize financial papers, file taxes, and other financial tasks. Approximately 2% of adults need help managing personal finances due to mental or physical impairments. As one might imagine, the percentage increases with age. Without support these people are vulnerable to fraud and financial abuse. They are often isolated and living in fear of losing their independence.

The Oregon Money Management Program offers support to people ages 60 and over with limited incomes and assets who need help with money management tasks. Services are provided by trained and supervised volunteers who support the program in the following ways:

- Bill-Pay volunteers provide one-on-one assistance to individuals who remain in control of their finances but need on-going help to keep on-track. Budgeting, organizing financial papers, paying bills, banking, and help filling out forms are examples of how Bill Payer volunteers help their client
- Payee volunteers provide one-on-one assistance to individuals who do not have the capacity to manage their federal benefits such as Social Security, SSA Disability, Veteran's, and Railroad Retirement. Volunteers manage these federal benefits on behalf of the individual ensuring that basic needs are met and funds are protected.
- Office Aides help Regional Program Coordinators program operations including processing client and volunteer paperwork and data entry
- Monitor volunteers examine client bank statements looking for red flags and needed supportive documentation
- Team Leaders support program volunteers at program satellite offices

## Program Safeguards

- Program volunteers are screened to ensure suitability to work with vulnerable individuals
- Volunteers receive specialized training with ongoing support and supervision
- Personal and financial information is kept secure and in strict confidence
- Operating procedures are in place to protect program participants from loss and volunteers and program sponsors from liability
- Easter Seals Oregon protects client's funds from loss due to mistake or misuse by program staff or volunteers

## Volunteer Commitment and Flexibility

Program staff matches volunteers to clients based on the preferences of each. Volunteers spend 2-4 hours per month helping their client. Volunteers and clients agree on the dates, times and frequency of their meetings.

## Partnerships for Success

Easter Seals Oregon coordinates the Oregon Money Management Program Statewide in partnership with the Oregon Department of Human Services, local community service organizations, and community volunteers. As the State Coordinating Agency, Easter Seals Oregon is committed to expanding money management services throughout Oregon. New partnerships are currently being developed to bring Oregon Money Management Program services into more Oregon communities.

Counties Served	Coordinating Agencies and Contact Information
Clackamas, Columbia, Multnomah, Washington	<b>Oregon City:</b> Clackamas County Volunteer Connection Shari Bandes (503) 655-8574 <a href="mailto:sbandes@co.clackamas.or.us">sbandes@co.clackamas.or.us</a> 2051 Kaen Rd, 1st floor, Oregon City, OR 97045
Jackson, Josephine	<b>Medford:</b> Consumer Credit Counseling Services of Southern OR Mario La Prova (541) 779-2273 <a href="mailto:laprovam@cccsso.org">laprovam@cccsso.org</a> 820 Crater Lake Ave. Ste. 0R, Medford OR 97504
Lane	<b>Eugene:</b> Lane County Senior & Disabled Services (541) 682-4177
Crook, Deschutes, Gilliam, Hood River, Jefferson, Klamath, Lake, Sherman, Wasco, Wheeler	<b>The Dalles:</b> Area Agency on Aging, MCCOG Mary Barrett (541) 298-4101 ext. 228 <a href="mailto:mary.barrett@mccog.com">mary.barrett@mccog.com</a> 1113 Kelly Ave The Dalles, 97058
Benton, Linn, Lincoln	<b>Albany:</b> OCWCOG Senior & Disability Services Diana Hancock (541) 812-2597 <a href="mailto:mmp@ocwcog.org">mmp@ocwcog.org</a>
Baker, Grant, Harney, Malheur, Morrow, Umatilla, Union, Wallowa	<b>Pendleton:</b> CAPECO Area Agency on Aging Jennie Clymer (541)278-5669 or (800)752-1139 <a href="mailto:Jclymer@capeco-works.org">Jclymer@capeco-works.org</a> 721 SE 3 <sup>rd</sup> St Suite D, Pendleton, OR 97801

For information about services, volunteering, or establishing a new program in your area, please contact Easter Seals Oregon at (800)-556-6020 or [mmp@or.easterseals.com](mailto:mmp@or.easterseals.com)



**Easter Seals Oregon, 5757 SW Macadam Avenue, Portland OR 97239** [www.or.easterseals.com](http://www.or.easterseals.com)