

# Pro Bono

The Pro Bono Director will lead FPA DFW's efforts to promote financial health in the Dallas/Fort Worth community by overseeing, expanding, and enhancing pro bono services, including financial counseling/planning, workshops, community partnerships, volunteer engagement, and financial literacy outreach.

---

## Key Responsibilities:

### 1. Strategic Planning & Leadership

- Develop and implement a strategic vision for the pro bono program aligned with FPA DFW's mission and values.
- Establish goals annually (program growth, outreach numbers, volunteer engagement, etc.).
- Regularly evaluate the program's effectiveness, track metrics, and report progress to the FPA DFW leadership/board.

### 2. Volunteer Management & Development

- Recruit, onboard, and train volunteer members, especially CFP® professionals, financial planners, educators, etc., to provide pro bono services.
- Provide ongoing support/mentorship to volunteers.
- Recognize, retain, and motivate volunteers via appreciation, feedback, and professional development opportunities.

### 3. Program Design & Delivery

- Plan and execute educational workshops, seminars, and financial literacy events (topics like budgeting, savings, debt management, credit, etc.).
- Identify underserved populations or community partners and tailor services to their needs.

### 4. Partnerships & Outreach

- Build and maintain relationships with local nonprofit organizations, educational institutions, community centers, libraries, and similar.
- Coordinate collaborative events or initiatives (e.g. Financial Planning Days in partnership with public libraries or nonprofits).
- Raise awareness of the pro bono program within FPA, the broader financial planning community, and in the public.

### 5. Operational Oversight

- Manage program logistics, budgeting, scheduling, and resource allocation.
- Ensure adherence to FPA's ethical, professional, and data-privacy standards.
- Maintain records (volunteer participation, client contacts, workshop attendance, feedback, impacts).