

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. 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 over age 59 and adults with a disability, who need help with personal 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 ongoing assistance 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 clients.
- **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 work as the liaison between the program office and the client to assist the program office in the management of these federal benefits on behalf of the individual, ensuring that basic needs are met and funds are protected.

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
- NorthWest Senior & Disability Services protects client's funds from loss due to mistake or misuse by program staff or volunteers

Flexible In-home Service

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

Counties Served	Coordinating Agencies and Contact Information
Clackamas, Columbia, Multnomah, Washington	Oregon City: Clackamas County Volunteer Connection Shari Bandes (503) 650-5623 ommp@clackamas.us 2051 Kaen Rd, 1st floor, Oregon City, OR 97045
Jackson, Josephine	Medford: Consumer Credit Counseling Services of Southern OR, Robin Hoerler (541) 779-2273 hoerlerr@cccsso.org 820 Crater Lake Ave. Ste. 202, Medford OR 97504
Lane	Eugene: Lane County Senior & Disabled Services Kristi Carlstrom (541) 682-4177 kcarlstrom@lcog.org 1015 Willamette Street, Eugene OR 97401
Crook, Deschutes, Gilliam, Hood River, Jefferson, Klamath, Lake, Sherman, Wasco, Wheeler	The Dalles: Area Agency on Aging, MCCOG Mary Barrett (541) 298-4101 ext. 228 mary.barrett@mccog.com 1113 Kelly Ave The Dalles, OR 97058
Benton, Linn, Lincoln	Albany: OCWCOG Senior & Disability Services Diana Hancock (541) 812-2597 mmp@ocwcog.org
Baker, Grant, Harney, Malheur, Morrow, Umatilla, Union, Wallowa	Pendleton: CAPECO Area Agency on Aging Shirley Harrison (541) 278-5686 or (800)752-1139 sharrison@capeco-works.org 721 SE 3 rd St Suite D, Pendleton, OR 97801
Coos, Curry	Coos Bay: Coos Elderly Services, Inc. Elena Keizer (541) 756-1202 elena@cooselderly.org 390 S. 2 nd St., Coos Bay, OR 97420
Douglas	Roseburg: UCAN – RSVP Erica Kimrey (541) 492-3923 erica.kimrey@ucancap.org 280 Kenneth Ford Dr., Roseburg OR 97470
Clatsop, Marion, Polk, Tillamook, Yamhill	Salem: Northwest Senior & Disability Services Julie Sobel (503) 304-3407 julie.sobel@nwsds.org 3410 Cherry Ave. NE Salem, OR 97309