

# Money Coach Volunteer Profile: One-on-One Coach

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## Money Coach Program

SecureFutures' Money Coach program is a hands-on financial coaching program delivered to a group of high school students by volunteer coaches. The program aims to provide a deeper understanding of financial concepts and hands-on goal-setting through a lesson plan that focuses on direct volunteer-to-student interaction.

The primary role of all SecureFuture volunteers is to engage students in financial education lessons by asking questions, leading discussions, and sharing professional and life experience.

The distinct role of the Money Coach volunteer is to coach. The One-on-One Coach volunteer engages and encourages participants and conducts one-on-one check-ins. The check-ins enable the coach and students to build meaningful and supportive relationships. Coaches help students to develop action plans to achieve financial needs and goals and guide them if they are faced with obstacles while working toward those goals. Students practice healthy money management skills and are provided the opportunity to earn a scholarship as they meet program benchmarks.

## Volunteer Responsibilities

- Attend training and become familiar with lesson plans.
- Provide SecureFutures with current contact information, preferences, and availability by maintaining your Volunteer Profile (available by accessing the Volunteer Login on our website).
- Attend every session, with reasonable exceptions. If you will not be on time, communicate with the Site Partner and Program Manager.
- Communicate planned absences with all stakeholders (Program Manager, Site Partner, other Coaches).
- Communicate with your coaching team prior to each session to prepare and review the lesson plan.
- Meet individually with assigned students for ten minutes during each session, except session 3.
  - Monitor each student's progress using the **Financial Goal Checklist**.
  - Listen, guide, and coach students.
  - Help students to address obstacles and mistakes.
- Get to know your students and meet them where they are by building meaningful relationships.
- Communicate with your assigned students a minimum of once outside of the sessions. Use the method of communication that the student prefers.
- **Communicate student progress, via the Student Tracker (Google Sheet), to the Program Manager within two business days of the fifth and eighth sessions.**
- Guide students through the program and account enrollment processes, if they have not completed them by the first session.
- Conduct yourself in a professional and appropriate manner at all times.
- Operate in the best interest of the students and hold them accountable.
- Maintain and protect the confidentiality of program participants' confidential information consistent with the terms of the Responsibility & Commitment Pledge.
- Abide by all SecureFutures' policies, especially the Cultural Sensitivity and Anti-Harassment policies.

## Expected Commitment

The Money Coach program follows a four month schedule. It is offered to sites twice per year. Volunteers are required to commit to 1 four month program. Sessions are held twice a month, for a total of eight sessions. Each session lasts 90 minutes, for a total of three hours per month. The total volunteer commitment is 12 hours of coaching time, plus five hours of training, over four months.

## Preferred Talents and Interests

- Desire to work with teenagers who come from economically disadvantaged families and communities.
- Desire to build meaningful relationships with teenagers.
- Working knowledge of foundational personal finance concepts. (Training will be provided.)
- Basic computer skills.