



*SecureFutures*

**VOLUNTEER  
POLICY AND PROCEDURE  
MANUAL**

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Dear Friend,

Thank you for your interest in becoming a volunteer with SecureFutures (formerly Make A Difference - Wisconsin). I am very proud of this organization and all we've accomplished since I founded it in 2006. My hope was to make this world and our community better by giving teens (and their families) the knowledge to make better informed financial decisions. It is an absolute certainty that individuals and families on sound financial footings can and do strengthen the community.

To make this happen, SecureFutures' mission is to provide financial literacy programs and resources that empower students to make sound financial decisions. This mission can be accomplished only through the dedicated service of people such as you – volunteers who share our commitment to helping youth build stronger futures.

By presenting SecureFutures' effective financial literacy programs, our volunteers make a real difference in the lives of the students they teach. In turn, our programs make a real difference to our volunteers! We're told that participating in SecureFutures' vital programs contributes to professional development, presentation skills and knowledge of today's educational environment. More importantly, being involved in this service opportunity brings immeasurable satisfaction from knowing the messages you've shared will influence young men and women for years and years to come.

Our staff and board of directors are committed to ensuring our programs are successful experiences for both volunteers and students. We know we have the formula for success:

- ✓ trained and enthusiastic volunteers
- ✓ excellent programs
- ✓ a dedicated staff to manage the programs and support volunteers

It's a formula that will, indeed, "SecureFutures" in our community.

Thank you for volunteering to be a part of this important work.

Very sincerely,

A handwritten signature in black ink that reads "Lloyd".

Lloyd Levin  
Founder  
SecureFutures

## **MISSION STATEMENT**

SecureFutures' mission is to provide financial literacy programs and resources that empower students to make sound financial decisions.

## **VISION STATEMENT**

SecureFutures vision is to build strong communities where teens and their families make informed financial decisions and take control of their financial future.

## **ORGANIZATIONAL OVERVIEW**

SecureFutures has developed this Volunteer Policy and Procedure Manual as a reference for our volunteers. In general, a volunteer is defined as anyone who performs a task at the direction of and on behalf of an agency, without compensation or expectation of compensation. While volunteers are active in SecureFutures in several capacities, the primary roles are found within the Money Sense, Money Coach and Money Path programs. We ask you to read this manual before you begin your service with SecureFutures and to contact us if you have any questions or concerns. We want this volunteer experience to be a rewarding one for you, as well as for the teens you teach.

Volunteers such as you are vital to carrying out our mission of providing financial literacy education that enables students and their families to make sound financial decisions. Every academic year, SecureFutures engages volunteers from local businesses and professional communities to deliver hundreds of program lessons to thousands of students. Quite simply, SecureFutures could not achieve our program goals without you and others who give their time, enthusiasm and commitment to this mission!

SecureFutures is a non-profit 501(c) 3 organization governed by a Board of Directors. A growing staff led by the President and CEO provides leadership, coordination and oversight of all operations. Recruiting, training, placing and supporting volunteers are among their primary responsibilities. The staff also recruits schools and community-based organizations to participate in the programs, coordinates fund development activities and carries out the organization's business functions.

Policies and procedures regarding volunteer involvement may change from time to time. SecureFutures strives to keep all volunteers apprised of these changes and to provide revisions to this Manual promptly to all active volunteers. If you have any questions as you read this Manual, please contact the Volunteer Manager, Program Director, or CEO.

## **PROGRAMMING OVERVIEW**

Studies show that U.S. teens are graduating from high school without solid financial management skills. The lure of credit card offers and check-cashing stores, combined with a lack of money management education, sets many up for financial crises that can last a lifetime.

SecureFutures volunteers and staff strive to change that by delivering financial literacy programs to teens. We partner with schools and community-based organizations to enable our trained volunteers to deliver SecureFutures' curriculum.

We have developed three main programs to serve the teens in our community: Money Sense, Money Coach and Money Path. Additional resources are available to educators, including lessons on tax preparation, financial aid and planning for college, and insurance. SecureFutures also offers an e-learning series that covers 14 personal finance and financial planning topics.

## ***Money Sense***

Our foundational program is ***Money Sense*** and it consists of a series of three, 90 minute lessons focused on:

- Income, expenses, budgeting and saving;
- Choosing a financial institution, managing accounts and identity theft; and
- Understanding credit cards, credit scores, credit reports, and how to build good credit.

**Money Sense Volunteer Instructors** lead financial literacy lessons to groups of teens, normally in a classroom setting within high schools or community-based organizations. These organizations choose the timing and frequency of the lessons that meet their students' needs. Most programs are delivered in 3-6 visits over a period of 3-6 weeks. Programs are planned throughout the year and weekend and evening programs are available, on a limited basis.

***\*See page 13 for the Money Sense Volunteer Description.***

## ***Money Coach***

Our hands-on ***Money Coach*** program builds off of our core financial lessons, but adds in a mentoring component. The goal of the Money Coach program is for students to develop strong financial skills and behaviors that will prepare them for college, careers and living independently.

**Money Coach volunteers** mentor students from economically disadvantaged communities in small groups, alongside a team of other Coaches, and provide meaningful support and guidance while the students work toward goals that they set at the beginning of the program. There are two volunteer roles within this program: Group Coach and One-on-One Coach. The Group Coach is responsible for leading the group activities and ensuring that each session is on track. The One-on-One Coach leads small group activities and meets one-on-one with participants. Money Coaches meet with their group of students every other week for 90 minutes over the course of 4 months. Money Coach sessions begin in the fall and again in the spring and most take place during the school day. Limited evening programs are available.

***\*See pages 14 and 15 for the Money Coach Volunteer Descriptions.***

## ***Money Path***

Our ***Money Path*** lesson focuses on introducing students to financial planning in a technology-driven format. The goal of Money Path is for students to develop a better understanding of the potential outcomes of the choices they are making as they prepare to graduate high school.

**Money Path Volunteer Instructors** lead students through a financial planning simulation using cutting-edge software. Students are challenged to think about their goals for the future and build a realistic plan around those goals. Money Path lessons are 90 minutes and can be delivered in one to two visits.

***\*See page 16 for Money Path Volunteer Description.***

Whether you are a Volunteer Instructor or Volunteer Coach, SecureFutures provides all of the training, curriculum and materials you will need to deliver our programs. We also establish the connection between you and the educator, site partner, or program contact. Your primary role in program delivery is to engage with students as you share your unique perspective, your personal and professional experiences, and the invaluable benefit of your insights. The following pages will go into further detail about the volunteering process and experience for each program.

## GENERAL VOLUNTEER QUALIFICATIONS

To be a SecureFutures volunteer, you must:

- Be at least 18 years old.
- Hold a high school diploma, GED, or High School Equivalency Diploma.
- Submit to and pass a comprehensive criminal history check, including a sexual offender clearing.
  - *SecureFutures reserves the right to refuse acceptance of volunteers based on findings of any past or current behaviors. Convictions or unresolved charges related to the following offenses may disqualify you from volunteering:*
    - *Murder or physical assault*
    - *Sexual offenses or assault*
    - *Domestic violence or assault*
    - *Fraud or other financial crimes*
- Possess professional demeanor, appearance and language skills.
- Be available and commit to deliver the SecureFutures program of your choice in its entirety.
- Agree to complete training and review materials thoroughly before volunteering.
- Have access to reliable transportation from your home or place of employment to the location of the volunteer opportunity.
- Possess basic computer skills, including navigating the internet and advancing a slideshow presentation.
- Be able to carry at least 5 pounds.
  - *Most schools have accessible entrances and parking, but they may not be convenient.*
- Have confidence in your public speaking skills.
- Feel comfortable when interacting with teens.
- Be fluent in English.
  - *We do receive requests for programs delivered in other languages, so please let us know if you are fluent in other languages.*

**Note that financial expertise is not required. The lesson plans, curriculum, course materials and training are all provided by SecureFutures.**

## VOLUNTEER APPLICATION AND APPROVAL

SecureFutures recruits volunteers who meet qualifications, without regard for gender, race, or other factors. Those interested in volunteering begin the process by completing a [volunteer application](#). Because SecureFutures' programs are delivered to school-aged youth, all volunteers agree to submit to a comprehensive background check. Additional references or background checks may be requested. SecureFutures reserves the right to refuse acceptance of volunteers based on any past or current behaviors found through this process. When your application is approved, you will be notified and provided information on next steps for training and engagement for the program(s) you choose to be involved in.

## VOLUNTEERING IN THE MONEY SENSE PROGRAM

### **1. Recruitment**

All approved volunteers are invited to consider volunteering in the Money Sense program. You will regularly receive announcements of Money Sense training and program opportunities.

### **2. Training**

Volunteer training is required and essential to your success. It includes an overview of the program, curriculum, and suggestions for student engagement. Training is offered in an online, on-demand format, as well as through in-person events and live webinars. You must participate in one of these options before volunteering.

In-person training events and webinars are generally scheduled in the early fall and winter, coinciding with the start of the school semesters. Online training is also available. It can stand on its own, but also serves as a great primer before attending an in-person event or webinar or as a refresher. Volunteers are encouraged to review the course materials and attend training each year, as curriculum is continually updated and improved. Webinars that focus on the changes to the curriculum are held at the same time as the other semi-annual training events. An extensive Resource Library with best practice videos and demonstrations by our seasoned volunteers is also available. It is recommended as an ongoing training tool.

It is especially important that you plan to spend at least one hour scrolling through the presentations, reviewing materials, and preparing talking points and stories before heading into a classroom. Because you are asked to include brief stories of your own financial experiences, this individual preparation time is integral to becoming a confident and capable volunteer. A [Preparation Checklist](#) tool is also available to guide your preparation.

**Special note:** *There may be a lag between the time when you complete your training and when you volunteer. Please review the online training modules before you volunteer if a significant amount of time has passed since you were trained.*

### **3. Scheduling & Matching**

SecureFutures staff develop relationships with schools and community-based organizations to generate interest in our program and gain permission for it to be delivered. Because class period times and educators' lesson plans vary from situation to situation, programs will differ in length, frequency and number of visits. When SecureFutures has scheduled a program, trained Money Sense volunteer instructors are contacted regarding their availability.

A complete three lesson *Money Sense* program takes approximately 5-6 hours. However, a single class period may allow between 45 and 90 minutes of instruction, so the number of visits needed will vary. Generally, between three and six visits are required to deliver the complete Money Sense program, but some educators request just one or two of our lessons, so fewer visits are needed.

#### **Communication of volunteer opportunities:**

Volunteers are regularly notified of available opportunities via email. Announcements are generally sent every 4-6 weeks and may come more frequently depending upon the quantity or immediacy of available opportunities.

Individually or as a member of a group of volunteers, you may additionally be notified of targeted opportunities. These targeted invitations are based on the needs of the program or your volunteer preferences. Volunteer opportunities are also listed on the SecureFutures [website](#).

Most volunteer opportunities have a predetermined program schedule, though a few are flexible. It is strongly preferred that volunteers adopt all dates of a given program, providing the reward of rapport and consistency of instruction. That said, if a desired program isn't a perfect match with your schedule, you are encouraged to notify SecureFutures of your interest as adjustments can sometimes be made.

**Matching of volunteer opportunities:**

SecureFutures works diligently to match volunteers to appropriate opportunities to maximize the benefit and enjoyment of everyone involved. Matches are made based on the preferences you designate in your application, such as the type of volunteer opportunity, times and days that are convenient for you, location of the school or community-based organization, and student populations that you want to serve. Staff will also consider other factors such as the demographics of the students, classroom dynamics, student needs, etc.

If you are interested in volunteering for an available program, simply reply to the request. Our Volunteer Manager will respond to discuss the opportunity with you, in order to determine if it is a good fit for all parties involved.

When it is agreed that you will accept an assignment, you receive a confirmation email with detailed program information including:

- Name and address of program location
- Where to park and where to enter the site
- Contact information for the teacher or program contact
- The number of students in the class and other relevant information

Once you receive the contact information for the program contact, you are encouraged to connect with them to introduce yourself, ask questions, and share concerns before, during, or after the program.

SecureFutures provides all the instructor and student materials needed. You will receive it via Bonded Transportation Solutions or the US Postal Service.

**4. Reporting**

Most SecureFutures programs require volunteers to distribute and collect student surveys and evaluations. You will also be responsible for returning the completed forms and, if possible, any leftover materials. Staff assistance is available.

**5. Support & Feedback**

Volunteers can rely on readily available support from staff. The Volunteer Manager will check in with you after your first day in the classroom to address any issues that may have arisen. In addition, you will be invited to complete an online evaluation at the completion of every program. SecureFutures is an input-driven organization and values your feedback and suggestions.

# **VOLUNTEERING IN THE MONEY COACH PROGRAM**

## **1. Recruitment**

Due to the nature of the program, recruitment of Money Coach volunteers involves an extra level of screening beyond what is required for Money Sense volunteers. Recruitment occurs in the late summer/early fall, prior to the start of the school year, and again in the winter, prior to the start of the second semester. Email announcements will be sent to all volunteers during the recruitment periods. Opportunities are also listed on the [SecureFutures website](#). The Money Coach Program Manager will directly contact interested volunteers during the recruitment periods to discuss the program and volunteer expectations.

Money Coach volunteers are expected to commit to the entire 4-month program period and attend each of the 8 sessions, plus the end-of-program celebration. Volunteers are also required to attend a 1 day, 4 hour training. Volunteers should have a passion for working closely with teens, an interest in building personal, supportive relationships with the participants, and a willingness to work as a team with other volunteers serving at the same site. If the Program Manager determines that the volunteer is a good match for the program, they will be invited to join.

## **2. Assignments**

Money Coach volunteers are matched to sites based on geographic location, demographics, schedule availability, and alignment of skills or experience to student needs and volunteer team. The Money Coach program serves students in a variety of settings, including alternative schools and community-based organizations, and some student groups respond best to volunteers with specific skill sets or life experiences. Ensuring a good match between volunteers and sites is essential to achieving a successful and satisfying experience for all.

## **3. Training**

Volunteer training is required for all Money Coach volunteers. Training takes place in a 4 hour, Saturday session. Webinars and online training are not available for this program. Money Coach training covers the program structure and logistics, lesson curriculum, and skills for leading group sessions and working one-on-one with teens.

## **4. Reporting**

The Money Coach Program Manager does not attend every session, so we rely upon site partners, our liaisons with the schools and organizations that host the program, and volunteers to report student progress. Site partners report attendance at each session. Volunteers assess and report student progress twice throughout the duration of the program (after sessions 5 and 8). Volunteers are trained on how to assess student progress and are provided with a rubric. Student progress reports are submitted via a Google spreadsheet that is shared with all volunteers. Training on using the spreadsheet is available, if needed. Timely completion and submission of the progress reports is essential, as students' scholarship payments are determined by program achievement.

## **5. Support & Feedback**

Ongoing support is provided to volunteers throughout the program. The Program Manager is available to discuss any situation and can serve as an extra support in the sessions, when needed. Volunteers are encouraged to share feedback and are invited to complete a satisfaction survey at the end of the program.

# **VOLUNTEERING IN THE MONEY PATH PROGRAM**

## **1. Recruitment**

Money Path is a lesson built around our web-based Money Path App. Students work independently to explore how the different choices available to them can affect their future financial goals. Volunteers demonstrate and assist with the app, and play an important role driving engagement by asking questions and sharing their own experiences.

This volunteer opportunity is appropriate for individuals who are comfortable using simple technology, have experience with developing and maintaining a budget and working towards saving goals, and are comfortable delivering a lesson where students work independently.

## **2. Training**

Volunteer training is required and essential to your success. It includes an overview of the program, curriculum, and suggestions for student engagement. Training is generally scheduled in the early fall and winter, coinciding with the start of the school semesters., either in person or through a webinar. The training covers the curriculum, materials, and how to utilize Money Path App in the lesson.

## **3. Scheduling & Matching**

Money Path lessons are delivered in one 90 minute session or two 45 minute sessions. Money Path opportunities are communicated through emails to volunteers who have completed Money Path training. Volunteer opportunities are also listed on the SecureFutures [website](#).

The scheduling process is very similar to Money Sense (see Money Sense Program “Matching of Volunteer Opportunities,” pg.7).

## **4. Reporting**

At the end of a Money Path lesson, all students are invited to complete a program evaluation. It is the responsibility of the volunteer to distribute, collect, and return the evaluations to SecureFutures.

## **5. Support & Feedback**

Volunteers can rely on readily available support from staff. The Volunteer Manager will check in with you after your first day in the classroom to address any issues that may have arisen. In addition, you will be invited to complete an online evaluation at the completion of every program. SecureFutures is an input driven organization and values your feedback and suggestions.

## GENERAL RESPONSIBILITIES OF A SECUREFUTURES VOLUNTEER

As a volunteer, you are asked to:

- Provide SecureFutures with current contact information, preferences and availability by maintaining your Volunteer Profile (available by accessing the Volunteer Login on our website).
  - *Please respond promptly to the annual profile update request SecureFutures sends to all volunteers.*
- Respond by email or phone to SecureFutures after being contacted regarding your availability for an assignment. The opportunity is likely offered to other volunteers, too, so please reply as quickly as possible.
- Accept assignments **only** if you are reasonably certain you will be available and able to keep your commitment.
- In the event of an emergency that prevents you from completing the assignment as scheduled, contact the SecureFutures office and the educator, site partner, or program contact.
  - *If scheduling conflicts arise, please be sure to provide as much advance notice as possible so that we can attempt to find a volunteer to take your place and avoid cancelling the program.*
- Present yourself in a professional manner, including business or business casual attire.
- Deliver the programs as designed.
- Fulfill reporting requirements and return evaluations to SecureFutures in a timely fashion.
- Follow the school or community-based organization's standard of conduct, as articulated by the educator, site partner or program contact.
- Attempt to resolve any concerns regarding students or the volunteer environment directly with the educator, site partner or program contact. SecureFutures staff are available to assist you.
- Promptly report any unresolved concern or other issue to the SecureFutures office.
- Abide by all SecureFutures' policies, especially the Confidentiality Policy and Anti-Harassment Policy.

## GENERAL RESPONSIBILITIES OF SECUREFUTURES STAFF

Volunteers are a valuable resource to SecureFutures and the students we serve. Volunteers who meet the criteria for placement have the right to meaningful assignments, effective supervision, and recognition for their work. Therefore, SecureFutures staff provides:

- Proven and effective programs that are kept current, relevant, and engaging for students.
- Effective training that is reviewed and adapted periodically.
- Regular communication, including:
  - Regular e-newsletters
  - Regular volunteer opportunity announcements
  - Program updates, as needed
  - Special communications, as needed
- All curriculum and program materials.
- Information necessary for you to establish contact with educators, site partners, or program contacts.
- Current contact information, so you can reach SecureFutures staff with questions or concerns.
- Observation and presentation feedback, upon request and when possible.
- Prompt response by staff to any concerns that you cannot readily resolve.
- Support in your volunteer service, by way of training resources and guidance.
- Recognition through e-newsletter and at appreciation event(s).
- Tracking and verification of your service hours, upon request.

## **CONFIDENTIALITY POLICY**

Volunteers are responsible for maintaining the confidentiality of all proprietary or privileged information to which they are exposed while serving as a volunteer, whether this information involves staff, other volunteers, students, teachers or any other SecureFutures business. By accepting a volunteer assignment, you hereby agree to hold in confidence the confidential information and hereby agree not to disclose or divulge any confidential information, or use any confidential information for any purpose (other than as may be appropriate or necessary directly in connection with SecureFutures programming), unless such confidential information: (a) is known or becomes known to the public in general (other than as a result of a breach of this policy by you to any person or entity to whom you disclose the confidential information); or (b) is or has been made known or disclosed to you by a third party without a breach of any obligation of confidentiality or duty; however, you may disclose confidential information as may be required by law, provided that you promptly notify the SecureFutures of such disclosure and take reasonable steps to minimize the extent of any such required disclosure. Failure to maintain confidentiality may result in termination of the volunteer's relationship with the organization or other corrective action.

## **ANTI-HARASSMENT POLICY**

SecureFutures does not tolerate harassment directed at an employee, volunteer, program participant, program partner, collaborating partner or vendor, whether sexual harassment or harassment, because of his/her race, religion, national origin, age, disability, or any other protected classification as specified by local, state or federal law.

If a volunteer is accused of harassment of a student, teacher, another volunteer or staff member, the volunteer is not allowed to participate in any SecureFutures activity or program, pending investigation. If the accusation is upheld, the volunteer is dismissed immediately from any service on behalf of, or in connection with, SecureFutures.

## **CULTURAL SENSITIVITY POLICY**

SecureFutures recognizes the diversity of the students we reach with our programs, as well as the diversity of volunteers, staff, teachers, administrators, program partners and collaborators. This includes diversity in race, ethnicity, gender, religion, ability and sexual orientation, among other factors.

SecureFutures, recognizing that such diversity is enriching, asks volunteers to demonstrate cultural sensitivity in all settings: training, program presentations, recognition events, and any other SecureFutures activity. This includes, but is not limited to:

- Refraining from using language that could be considered derogatory or inflammatory.
- Using care in selecting examples of personal experiences to share and avoiding those that might be interpreted to be demeaning to any racial, ethnic, gender, religious, or sexual orientation group.
- Engaging in any other behavior or conversation that is hurtful or insulting to any group.

If it comes to the attention of SecureFutures staff that a volunteer has violated the intent of this policy, SecureFutures will endeavor to discuss the situation with and provide coaching to the volunteer, in order to avoid a future occurrence. In the event the incident demonstrates egregious insensitivity or the volunteer continues to exhibit such behavior, the volunteer will be dismissed.

## **TRANSPORTATION/PERSONAL VEHICLE USE POLICY**

Volunteers are expected to have access to reliable transportation to and from the sites where they will be volunteering. SecureFutures does not furnish any insurance for the protection of the volunteer if any claim or suit is made against the volunteer arising out of his or her operation of a personally owned vehicle unless; nor is any insurance provided by SecureFutures to repair damage that may occur to the volunteer's personally owned vehicle. It is recommended that all volunteers maintain at least the minimum automobile coverage required by law.

## **MEDIA AND PHOTO RELEASE POLICY**

Media images and recordings bring life to and help to tell the story of SecureFutures' work in the community. We would like to share media items recorded at our various programs and events in materials that we produce, including, but not limited to, promotional materials, recruitment flyers, newsletters, other printed materials, videos and website content.

Accordingly, participation in SecureFutures activities implies permission for publication of any media recorded during the activities. If you submit images or other media to be used by SecureFutures you are giving the organization the right to use the media. These items must not contain any copyrighted material without permission. Please do not take and/or share any photos that include the faces of students unless you have gained explicit permission to do so.

If you don't want your image to be used in our storytelling, please contact SecureFutures by phone or email. Additionally, if you are at an event and you see someone in the vicinity taking pictures or recording video, please endeavour to alert the photographers or videographers, so that you are not accidentally captured in crowd shots.

## **RESIGNATION AND DISMISSAL OF VOLUNTEERS**

SecureFutures accepts the service of volunteers with the understanding that they serve at the sole discretion of the organization which may, at any time, for whatever reason, decide to terminate the volunteer's relationship with SecureFutures. Similarly, volunteers may at any time, for whatever reason, decide to end their relationship with the organization. Volunteers wishing to end their relationship with the organization may do so by contacting the Volunteer Manager, who will promptly remove the individual from the list of active volunteers.

A volunteer may be removed from active service for reasons including, but not limited to:

- Being unprepared.
- Failing to appear when scheduled without notifying the school or community-based organization and SecureFutures office in advance.
- Displaying signs of being under the influence of alcohol or other controlled substances when volunteering.
- Violating Confidentiality Policy.
- Violating Anti-Harassment policy.
- Violating the Cultural Sensitivity Policy.
- Failing to follow the standards of conduct articulated by the school or community-based organization.

Volunteers may appeal their dismissal by submitting a letter to the President and CEO which details why the dismissal was unfounded.

## APPENDICES

### Money Sense Volunteer Profile

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#### Money Sense Program

SecureFutures' Money Sense program is an engaging, discussion and activity-based financial literacy program delivered to high school students. The program aims to educate students on the basics of personal finance and to help students prepare for life beyond high school.

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 Sense volunteer is to instruct. The volunteer engages and motivates a class or group of students to participate in the lesson using a slide-based presentation and student workbooks with activities. Students learn healthy money management skills through the knowledge of financial concepts.

#### Volunteer Responsibilities

- Attend training and become familiar with the program curriculum.
- Provide SecureFutures with current contact information, preferences and availability by maintaining your profile (available by accessing the Volunteer Login on our website).
- Respond by email or phone to SecureFutures after being contacted regarding your availability for an assignment.
- Accept assignments **only** if you are reasonably certain you will be available and able to keep your commitment.
- In the event of an emergency that prevents you from completing the assignment as scheduled, contact the SecureFutures office and the educator, site partner, or program contact.
- Deliver the program as designed.
- Fulfill reporting requirements and return surveys and evaluations to SecureFutures in a timely fashion.
- Follow the school or community based organization's standard of conduct, as articulated by the educator, site partner, or program contact.
- Attempt to resolve any concerns regarding students or the volunteer environment directly with the educator, site partner, or program contact.
- Promptly report any unresolved concern or other issue to the SecureFutures office so it can be resolved.
- Abide by all SecureFutures' policies, especially the Cultural Sensitivity and Anti-Harassment policies.

#### Expected Commitment

Volunteers commit to delivering the Money Sense program in its entirety, either alone or with a partner, at least one time each year. Money Sense programs are approximately 5 hours, split over 3-6 visits. Most volunteer opportunities are scheduled during school hours and within the academic year, however opportunities are also available during evenings, weekends, and in the summer.

#### Preferred Talents and Interests

- Desire to work with teenagers in an engaging manner.
- Experience with public speaking, presenting, or teaching.
- Working knowledge of foundational personal finance concepts. (Training will be provided.)
- Basic computer skills.

## Money Coach Volunteer Profile: Group Coach

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### Money Coach Program

SecureFutures' Money Coach program is a hands-on financial coaching program delivered to a small 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 Group Coach volunteer engages and encourages participants and leads small group lessons. The lessons serve to educate participants on financial literacy and to guide them in the development of action plans to achieve financial needs and 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 the 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).
- Prepare for and lead the group lessons, as designed.
- Infuse the lesson plans with your own stories and activities, when appropriate.
- Communicate with your coaching team prior to each session to prepare and review the lesson plan.
- Determine and maintain the pace of the curriculum so that it matches the students' progress and capabilities.
- 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.
- Experience with public speaking, presenting, or teaching.
- Working knowledge of foundational personal finance concepts. (Training will be provided.)
- Basic computer skills.

## 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.

# Money Path Volunteer Profile

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## Money Path Program

SecureFutures' Money Path program is a technology-based financial literacy lesson delivered to high school students, where students work independently on their own computers, at their own pace. The lesson is centered around the Money Path App, a web-based application. The program aims to help students make informed decisions regarding their education and career choices after high school and to increase their understanding of basic financial planning concepts.

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 Path volunteer is to facilitate. The volunteer demonstrates and assists with the Money Path app and drives engagement through discussion. Students explore how their decisions about college, career, budgeting, and saving will impact their long-term goals and lifelong financial success.

## Volunteer Responsibilities

- Attend training and become familiar with the program curriculum and App.
- Provide SecureFutures with current contact information, preferences and availability by maintaining your profile (available by accessing the Volunteer Login on our website).
- Respond by email or phone to SecureFutures after being contacted regarding your availability for an assignment.
- Accept assignments **only** if you are reasonably certain you will be available and able to keep your commitment.
- In the event of an emergency that prevents you from completing the assignment as scheduled, contact the SecureFutures office and the educator, site partner, or program contact.
- Deliver the program as designed.
- Fulfill reporting requirements and return materials to SecureFutures in a timely fashion.
- Follow the school or community based organization's standard of conduct, as articulated by the educator, site partner, or program contact.
- Attempt to resolve any concerns regarding students or the volunteer environment directly with the educator, site partner, or program contact.
- Promptly report any unresolved concern or other issue to the SecureFutures office so it can be resolved.
- Abide by all SecureFutures' policies, especially the Cultural Sensitivity and Anti-Harassment policies.

## Expected Commitment

Volunteers commit to delivering the Money Path program in its entirety, either alone or with a partner, at least two times each year. Money Path programs are approximately 1.5 hours, split over 1-2 visits. Most volunteer opportunities are scheduled during school hours and within the academic year, however opportunities are also available during evenings, weekends, and in the summer.

## Preferred Talents and Interests

- Desire to work with teenagers in an engaging manner.
- Experience with public speaking, presenting, or teaching.
- Working knowledge of foundational personal finance concepts, especially budgeting and saving for future goals. (Training will be provided.)
- Basic computer skills.
- Comfort working with simple, web-based technology.