

# Money Coach Site Partner Profile

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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.

Money Coach volunteers engage and encourage participants in small groups and one-on-one as they develop action plans to achieve financial needs and goals. Money Coach is a one-of-a-kind approach and has proven to be a valuable addition to high school programming. Money Coach also provides the opportunity for students to earn a scholarship as they meet program benchmarks.

## Site Partner Responsibilities

- **Attend mandatory Site Partner training.**
- Secure a safe, quiet, and consistent location to hold Money Coach sessions.
- Secure dates (every other week) and time (at least 90 minutes) for Money Coach sessions.
- Help to recruit students for the program.
- Provide interested students with orientation materials and information. Materials will be delivered by the Program Manager.
- Ensure all students complete the registration form, via the provided link, prior to first session.
- Collect completed student enrollment paperwork and **keep it secure** until the Program Manager can retrieve it.
- Orient volunteers to the school and inform them of policies and procedures.
- Serve as the "day-of" contact for the volunteers and students. **Have a presence at each meeting and be available for the entirety of the meeting, in case the group has unexpected needs.**
- **Record student attendance at the time of each session via the Student Tracker (Google Sheet).**
- Serve as a liaison between students and Money Coach Program Manager in between sessions.
- Remind students of upcoming meetings and encourage participation.
- Communicate with other school personnel to garner support for the program and ensure smooth facilitation of the program.
- Provide feedback on the program when requested (mid-program survey, informal check ins, exit meeting).
- Participate in the exit meeting at the end of the program.
- Maintain and protect the confidentiality of program participants' confidential information consistent with the terms of the Responsibility & Commitment Pledge.

## Expected Commitment

The Money Coach program follows a four month schedule. It is offered to sites (schools and CBOs) twice per year. Site Partners are required to commit to at least 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. Site Partners are required to have a presence at each session and make themselves available for a total of 12 hours of programming over four months.

## Qualifications

- Desire to engage volunteers in educational programming.
- Willingness to collaborate with a third party organization to deliver programming.
- Interest in and/or appreciation for financial literacy and the importance of it for teens.