

Money Coach

Volunteer Responsibility & Commitment Pledge

Contact Info

Name:	
Preferred Address:	
Preferred Email:	Preferred Phone:

Expectations For All Volunteers

- 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.
- 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.
- 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 this Pledge.
- Abide by all SecureFutures' policies, especially the Cultural Sensitivity and Anti-Harassment policies.

One-on-One Coach Responsibilities

- Meet individually with assigned students for ten minutes during each session, except session 3.
 - Review each student's progress using the **Financial Goal Checklist**.
 - Listen, guide, and coach students.
 - Assist students in setting a savings plan.
 - Monitor the students' progress and help them 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.

Group Coach Responsibilities

- Prepare for and lead the group lessons, as designed.
- Infuse the lesson plans with your own stories and activities, when appropriate.
- Determine and maintain the pace of the curriculum so that it matches the students' progress and capabilities.

Site Partner Responsibilities

- Attend mandatory Site Partner training.
- Secure a safe, quiet, and consistent location to hold Money Coach sessions.
- Help to recruit students for the program.
- 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.
- Communicate with other school personnel to garner support for the program and ensure smooth facilitation of the program.

Program Manager Responsibilities

- Provide training to volunteers and site partners.
- Serve as liaison between site and volunteers.
- Collaborate with site partners on student recruitment.
- Troubleshoot obstacles with the site and banking partners.
- Provide volunteers and site partners with curriculum and materials.
- Provide support and guidance to volunteers, when necessary.
- Attend occasional group sessions to monitor the program and observe volunteers in action.
- Maintain attendance and progress report data to ensure proper disbursement of scholarships.

Confidentiality & Non-Disclosure Obligations

In connection with your role as a volunteer in the Money Coach Program, students and other program participants will be disclosing to you certain personal financial data, banking information and other proprietary, confidential and nonpublic information (collectively, “Confidential Information”). By signing this Pledge, 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 the Money Coach Program), 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 Pledge 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 Money Coach Program of such disclosure and take reasonable steps to minimize the extent of any such required disclosure. The obligations set forth herein shall survive for two (2) years following the date hereof. Upon request from the Money Coach Program, you will destroy or return all Confidential Information to Secure Futures, Inc.

By signing this Pledge, you agree to the foregoing and to fulfill the responsibilities above that relate to your volunteer role.

Signature:	Date:
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