

# Volunteer Profile: Group Coach

## 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 Group Coach volunteer engages and encourages participants and leads small group lessons (12-15 students). 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 Money Coach orientation and every group session, with reasonable exceptions. If you will not be on time, communicate with the Site Partner and Program Manager. Planned absences need to be communicated in advance.
- Prepare for and lead the group lessons, as designed.
- Infuse the lesson plans with your own stories and activities, when appropriate.
- Familiarize yourself with how to lead presentations and how to use features of the presentation platform to keep the students engaged (screen sharing, video/sound sharing, chat, informal polling, etc.).
- 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 an 11 week schedule. Volunteers are required to commit to the full 11 week program. Group sessions are held every other week, for a total of six sessions. Each session lasts about 60-75 minutes. The total volunteer commitment is up to 10 hours of prep and coaching time, plus training, over 11 weeks.

## 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, including video conferencing.

# Volunteer Profile: One-on-One Coach

## 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 Money Coach orientation and group sessions. If you will not be on time, communicate with the Site Partner and Program Manager. Planned absences need to be communicated in advance.
- Meet individually with assigned students for about 15 minutes, every other week. Check ins can be done by phone call or video conferencing.
- 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.
- Additional weekly communication with students by email, text, or call is encouraged. Use the method of communication that the student prefers.
- **Report completion of check ins to the Program Manager, via email, as soon as the check ins occur. Participation in these check ins contributes to the scholarships the students earn, so timely reporting is necessary.**
- 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 an 11 week schedule. Volunteers are required to commit to the full 11 week program. Group sessions are held every other week, for a total of six sessions. Each session lasts about 60-75 minutes. Volunteers will also spend a total of 60-90 minutes checkin in with students every other week. The total volunteer commitment is up to 12 hours of coaching time, plus training, over 11 weeks.

## 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, including video conferencing.