



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. I hoped 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 footing 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.

VALUES STATEMENTS

Empowerment - We believe young people have the power to take ownership of their financial futures. We strive to inspire them to learn and develop new skills that support their goals.

Equity - We strive to advance equitable and inclusive access to financial systems, resources, and opportunities while working to address systemic barriers.

Community - We believe in the power of bringing people together. Financially capable individuals and engaged citizens lead to stronger communities.

Service - We lead through service and gratitude. We prioritize the needs of our students and stakeholders and respond accordingly.

Integrity - We believe in doing the right thing. We practice honesty, transparency, integrity, and accountability every day.

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, Director of Volunteer Programs, or President and 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 education and mentoring 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. SecureFutures also offers online learning modules that cover 14 personal finance and financial planning topics.

SecureFutures provides all of the training, curriculum, and materials that volunteers need to deliver the programs. A volunteer's primary role in program delivery is to engage with students as they share their unique perspectives, personal and professional experiences, and the invaluable benefit of their insights.

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 volunteers 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 3-6 weeks. Programs are planned throughout the year and most take place during the school day and within the academic year. Weekend, evening, and summer programs are available, on a limited basis. The role of the Money Sense volunteer is to lead an engaging lesson. The volunteer motivates a class or group of students to participate in the lesson using a slide-based presentation, discussion prompts, storytelling, and student workbooks with activities. Students learn healthy money management skills through the knowledge of financial concepts.

Expected Commitment

Volunteers commit to delivering the Money Sense program in its entirety, either alone or with a partner, at least once each year. Money Sense programs are 2-6 hours total, delivered over 1-6 visits. Volunteers have the flexibility to choose which programs work best for them and are encouraged to volunteer as often as their schedule allows.

Money Path

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

Money Path volunteers guide students through building academic, career, and financial plans 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 60-90 minutes and are usually delivered in 1-2 visits, delivered over 1-2 weeks. Programs are planned throughout the year and most take place during the school day and within the academic year. Weekend, evening, and summer programs are available, on a limited basis. The role of the Money Path volunteer is to facilitate an impactful experience. 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.

Expected Commitment

Volunteers commit to delivering the Money Path program in its entirety, either alone or with a partner, at least once each year. Money Path programs are 60-90 minutes, split over 1-2 visits. Volunteers have the flexibility to choose which programs work best for them and are encouraged to volunteer as often as their schedule allows.

Money Coach

Our hands-on ***Money Coach*** program builds off of our core financial lessons but adds a mentoring component. The goal of the Money Coach program is for teens to develop strong financial skills and behaviors that will prepare them for college, careers, and living independently. Participants build healthy money management habits and have the opportunity to earn a scholarship as they meet program benchmarks.

Money Coach volunteers mentor participants from under-resourced and historically marginalized communities. Mentorship takes place in small groups, alongside a team of other coaches. Volunteers provide meaningful support and guidance while the participants work toward three outcomes: building a budget, tracking their expenses, and opening a bank account. The Money Coach program is delivered over a semester. It is offered to partner sites twice per year, coinciding with the fall and spring semesters. Most take place during the school day. Limited evening programs are available. There are two volunteer roles within this program: **Group Coach** and **One-on-One Coach**.

Money Coach Group Coach volunteers engage and encourage participants and present financial education lessons to a small group of 12-15 students. The lessons serve to educate participants on foundational financial concepts and guide them in building healthy money management habits.

Money Coach One-On-One Coach volunteers engage and encourage participants, lead small group activities, and conduct one-on-one check-ins with 3-4 assigned students. The check-ins enable the coach and participant to build a meaningful relationship. Coaches support students' comprehension of the lessons, help participants develop action plans to achieve financial goals, and guide them if they are faced with obstacles while working toward those goals.

Expected Commitment

Volunteers commit to participating in the Money Coach program, in its entirety, at least once each year. Coaches meet with their group of participants every other week for 60-90 minutes. The total volunteer commitment is ten hours of coaching time, plus four hours of training, over a semester. Volunteers have the flexibility to choose which programs work best for them and are encouraged to volunteer as often as their schedule allows.

GENERAL VOLUNTEER QUALIFICATIONS

To be a SecureFutures volunteer, you must:

- Be at least 21 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*
- Possesses professional demeanor, appearance, and language skills.
- Be available and commit to delivering 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.*

VOLUNTEER APPLICATION AND APPROVAL

SecureFutures, Inc. does not discriminate against nor give preference to any person because of race, religion, age, sex, national origin, disability, sexual orientation, marital status, ancestry, arrest or conviction record, or veteran status. 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 the next steps for training and engagement for the program(s) you choose to be involved in.

VOLUNTEERING IN THE MONEY SENSE PROGRAM

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.

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 the 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.

You must plan to spend at least one hour advancing 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.

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, volunteers are contacted regarding their availability.

A complete three-lesson *Money Sense* program takes approximately 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 2-3 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, although 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, the 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 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 the US Postal Service.

Reporting

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

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 after every program. SecureFutures is an input-driven organization and values your feedback and suggestions.

VOLUNTEERING IN THE MONEY PATH PROGRAM

Recruitment

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

Training

Volunteer training is required and essential to your success. Training is completely online and volunteers can complete at their own pace. The training covers how to utilize the Money Path App in the lesson. We also encourage volunteers to build 2-3 paths in the app before teaching in the classroom.

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 matching process is very similar to Money Sense (see Money Sense Program “Matching of Volunteer Opportunities,”).

Reporting

At the end of a Money Path lesson, all students are invited to complete a program evaluation in the app. It is the responsibility of the volunteer to encourage students to complete the survey during the lesson.

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 after every program. SecureFutures is an input-driven organization and values your feedback and suggestions.

VOLUNTEERING IN THE MONEY COACH PROGRAM

Recruitment

Due to the nature of the program, recruitment of Money Coach volunteers involves an extra level of screening beyond what is required for other volunteers. Recruitment occurs in the late summer/early fall, before the start of the school year, and again in the winter, before the start of the second semester. Email announcements will be sent to all volunteers during the recruitment period. The Volunteer Manager will follow up after your initial interest form completion, and the Money Coach Program Team will communicate periodically with the volunteers during the recruitment periods to discuss the program and volunteer expectations. If the Money Coach Program Team determines that the volunteer is a good match for the program, they will be invited to join.

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.

Training

Volunteer training is required for all Money Coach volunteers. Training takes place in a 4-hour, 1 day session.

Money Coach training covers the program structure and logistics, lesson curriculum, and skills for leading group sessions and working one-on-one with teens.

Reporting

The Money Coach program team 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 support student progress. Site partners report attendance at each session to the Money Coach program team. The Money Coach team will notify the volunteers of how students are progressing throughout the semester. Based on the update from the Money Coach team, volunteers encourage students to submit their forms and complete assigned tasks. Timely completion of the forms and tasks is essential, as students’ scholarship payments are determined by program achievement. Informally, volunteers report relevant information to the Money Coach team regarding student engagement and obstacles the students may be facing that impede their progress.

Support & Feedback

Ongoing support is provided to volunteers throughout the program. The Program Manager is available to discuss any situation and can serve as 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.

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.
 - *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 canceling the program.*
- Present yourself in a professional manner, including appropriate and neat 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 updated 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 is 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

In the course of their activities, volunteers may encounter or work with information that is of a confidential and private nature. This may include, for example, information about SecureFutures Foundation, Inc. program participants, program partners, collaborating partners, volunteers, funders, service providers or vendors, financial information about the operation of SecureFutures Foundation, Inc. or personnel information about SecureFutures Foundation, Inc. employees. Such confidential information may not be disclosed or given to anyone outside SecureFutures. Any breach of this confidentiality requirement is considered a serious offense.

In addition, when a volunteer ends their time with SecureFutures Foundation, Inc. or at such other time as requested by SecureFutures, the volunteer must return to SecureFutures Foundation, Inc. all SecureFutures-related information and property that the volunteer has in their possession or control including, without limitation, volunteer lists, donor lists, event lists, business cards, phone/e-mail directories, documents, files, records, manuals, information stored on a personal computer or a computer disc or other electronic media, supplies, and equipment or office supplies.

The Family Educational Rights and Privacy Act ensures that volunteers need to be mindful of the confidentiality of student, parent, and family information and ensure that they do not share or discuss any information or facts that they see or hear in school with others.

Confidential information may be disclosed when required by law, provided that you promptly notify 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.

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.

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 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 HUMILITY 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 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, 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 their operation of a personally owned vehicle; nor is any insurance provided by SecureFutures to repair the damage that may occur to the volunteer's personally owned vehicle or property. It is recommended that all volunteers maintain at least the minimum automobile coverage required by law. Under no circumstances are volunteers to transport students in their personal vehicles.

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 endeavor to alert the photographers or videographers, so that you are not accidentally captured in crowd shots.

CONFLICT OF INTEREST POLICY

Volunteers shall avoid personal and professional conflicts of interest in all matters of the teaching of SecureFutures curriculum. Conflicting interests may include but are not limited to, using your volunteer position to promote your own business, political, or religious agenda. Conflict of interest can also pertain to financial, personal relationships, and/or professional relationships. If it is unclear as to whether a conflict of interest exists, the volunteer shall discuss the issue with the Volunteer Manager.

WHISTLE BLOWER POLICY

SecureFutures Foundation, Inc. is committed to maintaining the highest standards of integrity, ethics, and accountability in all activities. This policy is designed to encourage volunteers to report any wrongdoing, unethical behavior, or misconduct they may encounter within the Organization. This policy creates a safe and confidential channel for volunteers to disclose concerns without fear of retaliation.

A Whistleblower is a volunteer, intern, or individual affiliated with SecureFutures who reports concerns, violations, or misconduct. Wrongdoing refers to any illegal, unethical, or improper activity that occurs.

Volunteers are encouraged to report any concerns, misconduct, or wrongdoing to the Volunteer Manager, Vice President of Programs, or President and CEO. Concerns should be submitted via email or a sealed envelope addressed to one of the individuals listed above.

SecureFutures is committed to maintaining the confidentiality of whistleblowers' identities to the extent permitted by law. Whistleblower reports will be treated with the utmost discretion, and steps will be taken to protect the identity of the reporting individual.

SecureFutures strictly prohibits any form of retaliation against volunteers who make a good-faith report under this policy. Retaliation may include but is not limited to, harassment, discrimination, or adverse actions. Any volunteer who believes they have faced retaliation for reporting wrongdoing should promptly report such incidents to the President and CEO.

SecureFutures will promptly investigate all reports of alleged wrongdoing. The appointed investigator will oversee the investigation, ensuring fairness and impartiality. Volunteers may be asked to provide additional information or assist in the investigation, but their cooperation will be handled with sensitivity and respect.

If a volunteer believes that someone has made a false or malicious report under this policy, they should report this concern to the President and CEO. SecureFutures will take appropriate measures to address any misuse of this policy.

SecureFutures is committed to protecting whistleblowers from retaliation for reporting concerns in good faith. Any individual found to have engaged in retaliation will be subject to disciplinary action, up to and including termination.

SAFETY POLICY

Emergencies such as fires, lockdowns, and other safety-related incidents can occur at any time in a school environment. Volunteers are responsible for ensuring their safety when at a location such as a school. They should follow the direction of the school staff present with them. Volunteers should familiarize themselves with things like emergency exits when entering a classroom. In case of any safety concerns, accidents, or incidents, volunteers should immediately report them to school staff and the Volunteer Manager.

STUDENT COMMUNICATION POLICY

Volunteers for the Money Coach program will regularly communicate with students one-on-one and outside of the school day. That communication should always remain professional. Volunteers should restrict their communication to phone, text, and email. Volunteers are encouraged to set boundaries and expectations for communications around such things as response time and times of the day/evening it's appropriate to communicate. Volunteers should never meet privately with a student without being accompanied by or in the sightline of another adult. Volunteers outside of the Money Coach program should not be communicating with students individually.