

# 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 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 SecureFutures volunteers is to engage students in financial education lessons by asking questions, leading discussions, and sharing professional and life experiences.

The distinct role of the Money Coach volunteer is to coach. The Group Coach volunteer engages and encourages participants and leads group lessons (12-16 students). The lessons serve to educate participants on financial literacy and guide them in developing action plans to achieve financial needs and goals. Students practice healthy money management skills and are provided the opportunity to earn a milestone reward 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.
- Attend Money Coach orientation and every group lesson in person, unless otherwise stated, with reasonable exceptions. If you will not be on time, communicate with the Site Partner and Program Staff. Planned absences need to be communicated in advance.
- Prepare for and lead the group lessons, as designed.
- Take attendance during each group lesson using the attendance tracker found at the back of the coach handbook. Be sure to submit/share it with the Money Coach Program Staff and the Site Partner after each group lesson.
- Infuse the lesson plans with your own stories and activities, when appropriate.
- Familiarize yourself with how to lead presentations and use features of the presentation platform to keep the students engaged.
- Determine and maintain the pace of the curriculum so that it matches the students' progress and capabilities.
- Share brief updates with One-on-one Coaches to keep them informed on what happened during the group lessons in biweekly coach team calls.
- Conduct yourself professionally and appropriately 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 and Training

The Money Coach program follows an 11-week schedule. Volunteers are required to commit to the entire program. The total commitment is up to 12 hours of volunteer time, which includes time spent coaching students, participation in planning conversations with your coaching team, and individual prep time. Group Coaches are only required to attend student orientation and group lessons, though they are welcome to attend check-in sessions if they like. There are a total of 5 group lessons which are held every other week. Each lesson lasts 60 minutes. Training is optional for those who served as Money Coach volunteers the previous semester (about 4 hours of training total). Training will be available in person and virtual.

## Preferred Talents and Interests

- Desire to work and build meaningful relationships with teenagers who come from historically marginalized and under-resourced communities.
- 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

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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 experiences.

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-in meetings. The check-ins enable the coach and students to build meaningful and supportive relationships. Coaches help students 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 milestone reward as they meet program benchmarks.

## Volunteer Responsibilities

- Attend training and become familiar with lesson plans.
- Provide SecureFutures with current contact information, preferences, and availability.
- Attend Money Coach orientation and all one-on-one check-in meetings, in person, with reasonable exceptions. If you will not be on time, communicate with the Site Partner and Program Staff. Planned absences need to be communicated in advance.
- Meet individually with assigned students for about 10 - 15 minutes during check-in sessions. Check-ins will take place at the site location.
- Mark your students' check-ins complete during each check-in session using the attendance tracker sheet found at the back of the coach handbook. Be sure to submit/ share it with the Money Coach Program Staff and Site Partner after each check-in.
- Assist students with their Money Coach Assignments.
- Listen, guide, and coach students along with helping them 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.
- Share brief updates with the Group Coach to keep them informed of what is happening during the one-on-one check-ins in biweekly coach team calls.
- Assist students with completing program forms, if they have not submitted them by the first group lesson.
- Conduct yourself professionally and appropriately 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 and Training

The Money Coach program follows an 11-week schedule. Volunteers are required to commit to the entire program. The total commitment is up to 12 hours of volunteer time, which includes time spent coaching students, participation in planning conversations with your coaching team, and individual prep time. One-on-one coaches are only required to attend student orientation and the one-on-one check-in meetings, though they are welcome to attend group lessons if they like. One-on-one check-ins are held every other week, for a total of 5 meetings. Each meeting lasts 60 minutes. Training is optional for those who served as Money Coach volunteers the previous semester (about 4 hours of training total). Training will be available in person and virtual.

## Preferred Talents and Interests

- Desire to work and build meaningful relationships with teenagers who come from historically marginalized and under-resourced communities.
- Working knowledge of foundational personal finance concepts. (Training will be provided.)
- Basic computer skills, including video conferencing.