Financial Coaching: Professional Development Policy

As coaches, we know that personal and professional growth is a lifelong journey. We encourage clients to constantly challenge themselves through learning new skills, exploring new resources and setting aspirational goals. Taking a page from our own playbook, we want to hold ourselves to these same standards and challenge ourselves to learn and grow! Foundation Communities' Financial Coaching program is introducing a professional development plan to strengthen volunteers' knowledge, skills and effectiveness. As stronger coaches, we'll be in a position to better support our clients on the path to financial stability.

Opportunities & Expectations

- Coaches will be required to participate in 4 hours of training activities on an annual basis (after their first year in the program).
- Both online activities and in-person sessions will count towards the 4 hours.
- The Financial Coaching team will host quarterly in-person training sessions that will cover a wide range of topics (each session will be two hours in length).
- The Financial Coaching team will also curate a list of online webinars that can be viewed at coaches' convenience.
- Additional in-person opportunities and webinars (identified by volunteers) can be submitted to program staff for consideration of approval. The content must fall within the core areas of our program: coaching techniques, budgeting, savings, credit and debt.
- We'll maintain records of in-person attendance. Webinar participation will occur on the honor system but coaches must self-report these hours to program staff in order to receive credit.
- Participation is mandatory to continue volunteering. Anyone who fails to meet the commitment will be dismissed from the program.

Volunteer & Community Benefits

- Sharpen your coaching skills and learn new strategies for supporting clients.
- Increase your level of comfort with the coaching role and boost your competencies.
- Increase your knowledge about a variety of topics, including (but not limited to) community resources, the populations we serve and systemic issues affecting our client base.
- Better support clients with a holistic approach to achieving their financial goals.
- Connect with other volunteers at the in-person sessions and share your experiences.
- Earn service hours for all time invested in training activities.

Communications & Tracking

- Program staff will alert you to training opportunities on a regular basis.
- The Coaches' Toolbox Section of the Volunteer Resource Page will contain links to pre-approved webinars (and will be updated regularly); listed under "Professional Development."
- All training hours will be recorded on your www.myvolunteerpage.com account so that you can track progress towards your 4-hour goal (listed under the "Hours" tab).
- Program staff will check in with all coaches throughout the year to help keep you on track and support your progress towards the training goal.
- Outside training opportunities can be submitted for approval to Program Manager Erika Leos (erika.leos@foundcom.org) or Volunteer Coordinator Eliana Brant (eliana.brant@foundcom.org).