



BUDGET COACH VOLUNTEER

United Way of Frederick County (UWFC) mobilizes the caring power of our whole community to improve lives. For nearly 85 years, UWFC has been fighting to achieve lasting change by identifying the ALICE (Asset-Limited, Income-Constrained, Employed) and low-to-moderate income families in Frederick County and working to strengthen their education, financial stability, and health to build a strong, viable community.

ABOUT THE POSITION

The Budget Coach Volunteer is a volunteer-based position that is responsible for guiding, teaching, and compassionately supporting UWFC Budget Coach program clients. Budget coaches will help ALICE households in Frederick County improve their ability to budget and make well-informed financial decisions including budgeting techniques, financial management, and goal attainment strategies. One-on-one sessions or monthly reporting guidelines must occur to verify the client's number of budget coach sessions, goal attainment, and/or anecdotal success stories. This may include spreadsheet data, Google surveys, and/or a brief narrative.

KEY RESPONSIBILITIES & DUTIES:

- Guide, teach, and compassionately support Budget Coach program clients, which may include UWFC savers as well as clients referred from a community partner, by providing one-on-one coaching.
- Inform and encourage clients to utilize Prosperity Center programs, including the homeownership program, the car ownership program, the credit café, and additional online financial resources.
- Coordinate and manage reoccurring appointments for each client and continue to update and monitor progress throughout duration.
- Assist with recruiting more potential clients.
- Promote the Budget Coach program and be an ambassador for financial stability.
- Complete one-time mandatory budget coach orientation, and ongoing financial stability training at least twice/year. Training opportunities will be provided.
- Complete and submit one-on-one budget coach reporting as required (e.g. spreadsheet, Google form, narrative, etc.).

QUALIFICATIONS & SKILLS

- Trust is a must! Respect and adhere to confidentiality with any given client.
- Strong interest in making a difference in the client's financial wellness and the community at large.
- Compassionate, empathetic, flexible to meet needs of diverse clients.
- Strong communication skills, interest in building relationships with first-time clients and seasoned savers.
- Supervision/Leadership/ Volunteer management or volunteer experience preferred.
- Ability to organize workload, work effectively and produce measurable results with minimal supervision.
- Understand financial literacy (knowledge of income and expenses, budgeting spreadsheets, asset building, working knowledge of credit scores and reports, etc.).
- Spanish-speaking/Bilingual a plus.

OTHER DETAILS

- Please anticipate intensive one-on-one volunteering on average 2-4 hours per month, with a possible 12-month commitment.
- This position has the flexibility for remote work (based on the needs of the clients and coaches).
- Meetings that take place in-person will adhere to CDC guidelines regarding mask wearing and social distancing.
- If you are currently enrolled in school, we value flexibility around key times including, but not limited to, final exams and holidays.

WHY IS THE BUDGET COACH IMPORTANT?

In Frederick County, MD, 35,291 households (37%) cannot afford basic needs such as housing, transportation, childcare, food, transportation, health care and technology. ALICE households have incomes above the Federal Poverty Level (FPL), but still struggle to afford basic needs.

As a volunteer with UWFC, you will provide insight and support ALICE individuals by providing knowledge and resources to help them achieve financial stability.

For more information on ALICE, visit: <https://www.unitedwayfrederick.org/challenge-alice>

WHAT MAKES UNITED WAY A GREAT PLACE TO VOLUNTEER?

Our culture rests on the values of inclusiveness, passion, compassion, excellence, innovation, and risk-taking. You'll be able to further develop your skills and gain hands-on experience that can be transferred to your future career. You'll receive supervision and support through check-

ins with a direct supervisor, as well as the opportunity to learn how to give and receive constructive feedback with other volunteers.

HOW TO APPLY

To apply, please submit your resume and a brief cover letter to Joyce Kwamena-Poh by emailing: jkwamenapoh@uwfrederick.org with the subject line “Budget Coach Volunteer.” Applications will be accepted on a rolling basis.