Dear Friend,

Thank you for your interest in becoming a volunteer with Make A Difference - Wisconsin. I am very proud of this organization and all we’ve accomplished since 2006, when I founded Make A Difference - Wisconsin. My hope was to make this world and our community better by giving high school students (and their families) the knowledge to make better informed financial decisions. It is an absolute certainty that individuals and families on sound financial footings can and do strengthen the community.

To make this happen, Make A Difference - Wisconsin’s mission is to provide financial literacy programs and resources to students. 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 Make A Difference - Wisconsin’s effective financial literacy program, 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 Make A Difference - Wisconsin’s vital program 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 board of directors and staff are committed to ensuring our program is a successful experience for both volunteers and students. We know we have the formula for success:

✓ trained and enthusiastic volunteers
✓ an excellent program
✓ a dedicated staff to manage the program and support volunteers

It’s a formula that will, indeed, “Make A Difference,” in our community.

Thank you for volunteering to be a part of this important work.

Very sincerely,

Lloyd Levin
Founder
Make A Difference – Wisconsin
MAKE A DIFFERENCE - WISCONSIN

POLICIES AND PROCEDURES
FOR OUR VOLUNTEERS

INTRODUCTION

Make A Difference - Wisconsin has developed this Volunteer Management Policy and Procedure Manual (Manual) as a general reference for our volunteers. We ask you to read it before you begin your service with Make A Difference - Wisconsin 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 students 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, Make A Difference - Wisconsin engages volunteers from the local business and professional communities to deliver hundreds of our program lessons to thousands of students. Quite simply, Make A Difference - Wisconsin could not achieve our program goals without you and others who give their time, enthusiasm and commitment to this mission!

Make A Difference - Wisconsin is a non-profit 501(c) 3 organization governed by a Board of Directors. A growing staff led by the President and C provides leadership, coordination and oversight of all operations. Recruiting, training, placing and supporting volunteers are among their primary responsibilities. The staff also recruits schools to participate in the program, coordinates fund development activities and carries out the organization’s business functions.

Policies and procedures regarding volunteer involvement may change from time to time. Make A Difference - Wisconsin strives to keep all volunteers apprised of these changes and to provide revisions to this Manual promptly to all active volunteers.

Again, if you have any questions as you read this Manual, please contact the Volunteer Manager or the CEO. After review, please indicate on the last page your acceptance and understanding of the Manual as the first step in your rewarding and worthwhile volunteer service with Make A Difference - Wisconsin.

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Updated September 2016
PROGRAM SUMMARY

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.

Make A Difference – Wisconsin volunteers and staff strive to change that by delivering financial literacy programs to high school students. We partner with schools and educators to enable our trained volunteers to deliver Make A Difference – Wisconsin’s curriculum.

Our programs are delivered by two types of volunteers: the Volunteer Instructor and the Volunteer Coach.

Volunteer Instructors teach financial lessons to a group of high school students normally in a classroom setting. Our core program is called Money Sense and it consist of a series of three lessons focused on:

- budgeting and saving
- understanding checking accounts
- understanding credit cards, credit history/scores, and credit reports.

Volunteer Instructors also teach our Money Path lesson which focuses on life skills financial planning in a technology focused format. Additional lessons on topics such as tax preparation, financial aid, or insurance may be taught by Volunteer Instructors.

Our hands-on Money Coach program builds off of our core financial lessons striving to develop strong financial skills and behaviors to prepare teens for college, careers and living independently. In this program, Volunteer Coaches mentor at-risk students in small groups and one-one-one, meeting monthly over the course of 9 months.

Whether you are a Volunteer Instructor or Volunteer Coach, Make A Difference - Wisconsin provides the training, curriculum and materials for you to present a program. We also establish the connection between you and the educator, site partner, or program contact. Your primary role in program delivery is to engage with students, as you share your unique perspective, accounts of your personal and professional experiences and the invaluable benefit of your insights.
HOW BEING A MAKE A DIFFERENCE – WISCONSIN VOLUNTEER WORKS

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 Make A Difference - Wisconsin in several capacities, the Volunteer Instructor and the Volunteer Coach are the primary roles.

SEE VOLUNTEER POSITION DESCRIPTIONS (APPENDIX 1)

1. Recruitment, Application and Approval

- Make A Difference - Wisconsin recruits volunteers who meet our qualifications through a variety of avenues, without regard for gender, race, or other condition.

- Anyone interested in volunteering begins the process by completing an application. If you’re reviewing this Manual, you may have already done so. If not, please go to: https://www.makeadifferencewisconsin.org/get-started/

- Because Make A Difference - Wisconsin’s programs are delivered to school-aged youth, all volunteers agree to submit to a comprehensive background check, including a criminal record check and sexual predator clearing. Additional references may be requested. Make A Difference - Wisconsin reserves the right to refuse acceptance of volunteers based on findings of any past or current behaviors.

- When your application is approved, you are notified and asked to review this Volunteer Policy and Procedure Manual.

- After reading this Manual, you are requested to indicate your understanding and acceptance of the Manual’s contents on the last page. You are welcome to talk with a member of the staff about any questions you may have prior to indicating acceptance.
2. **Training**

Volunteer training is required and essential to your success. It includes an overview of the program, curriculum, and suggestions for student engagement. **As a Volunteer Instructor or Volunteer Coach, your first step is to complete the online training found on our website.** It is easy to access and takes less than 60 minutes to complete.

**Attendance at volunteer training events is required for Volunteer Coaches and highly recommended for Volunteer Instructors.** Group sessions are generally scheduled in the fall, coinciding with the start of the school year, with additional training events available at other times of the year. **It is recommended that volunteers annually utilize online training and or attend a training event to review curriculum and program updates and to refresh your skills.** An extensive **Resource Library** with best practice videos and demonstrations by our seasoned volunteers is also available within Online Training. It is recommended as an ongoing training tool.

**Special notes: There may be a lag between the time when you complete your training and when you volunteer as programs are often affected by school schedules.**

3. **Scheduling**

Make A Difference - Wisconsin works diligently to match volunteers to appropriate volunteer 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, your preferences about the location of the school and its proximity to your work or home, the type of student you prefer. Staff will also consider other considerations such as the type of students and classroom dynamics, etc. Scheduling differs for Volunteer Instructors and Volunteer Coaches.

**Volunteer Instructor scheduling:**

All volunteers are regularly invited to be matched to Volunteer Instructor opportunities. Make A Difference - Wisconsin staff members develop relationships with schools to generate interest in our program and gain permission for it to be delivered. Because class period times and teachers’ lesson plans vary from situation to situation, scheduling is flexible. When Make A Difference - Wisconsin has arranged for programs to be presented, trained volunteer instructors are contacted regarding their availability.
When you accept an assignment, you receive detailed school information:

- Name and address of school and classroom number
- Where to park and where to enter the school
- Contact information for the classroom teacher or program contact
- The number of students in the class

Depending on the scheduling requirements and flexibility, volunteers are informed of a predetermined schedule and offered the opportunity to accept a specific assignment. (Note: Many of our partner teachers are teaching multiple sections and need to have all volunteers scheduled on the same dates.) Some volunteer opportunities offer flexibility in scheduling.

A complete *Money Sense* program generally takes approximately 4.5 hours; however, a single class period may allow between 45 and 90 minutes of instruction, so the number of visits needed will vary from situation to situation. Generally, between three and six visits are required to complete the *Money Sense* program presentation, but some programs are just one or two of our lessons so fewer visits are offered.

Make A Difference - Wisconsin sends all the materials needed for the presentation directly to you via Bonded Transportation Solutions, or via US Postal Service.

All Make A Difference - Wisconsin volunteer instructors are provided with contact information for staff members, and you are encouraged to ask questions and share concerns with them.

**Volunteer Coach** scheduling:
Although you are able to designate a preference to be considered a “coach of a small group of students” on your application and or within your website Volunteer Login Profile, Volunteer Coaches are specifically screened and selected dependent upon program need. Once selected, Volunteer Coaches generally meet monthly with students, providing small group lessons and one-one-one mentoring. Sessions are normally an hour and take place at the location of the school or community based organization.
4. **Reporting**

All Make A Difference - Wisconsin programs require volunteers to distribute, collect and review student surveys and evaluations. You will also be responsible to return the completed forms and if possible, any leftover materials. Staff assistance is available.

5. **Support and Recognition**

Volunteers can rely on readily available support from staff. In addition, you will be invited to complete an online evaluation at the completion of every program. Make A Difference - Wisconsin is an input driven organization and values your feedback and suggestions. We are also an organization that regularly recognizes and appreciates volunteers in our e-newsletters and at events such as our annual appreciation event.

**QUALIFICATIONS**

To be a volunteer instructor, you must:

- Be at least 18 years old.
- Hold a high school diploma, GED, or High School Equivalency Diploma.
- Possess professional demeanor, appearance and language skills.
- Be available and commit to deliver the Make A Difference - Wisconsin program in its entirety.
- Agree to complete training and review materials thoroughly in order to be familiar with the content before volunteering.
- Have access to transportation from home or place of employment to the volunteer opportunity.
- Possess basic computer skills.
- Be able to carry at least 5 pounds and to climb stairs at schools.
- Have confidence in your public speaking skills.
- Feel comfortable when interacting with youth.

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Be fluent in English; however, we do receive requests for programs delivered in other languages, so please let us know if you are fluent in any language in addition to English.

Note that financial expertise is not required. The lesson plans, curriculum, course materials and training are all provided by Make A Difference - Wisconsin.

RESPONSIBILITIES OF VOLUNTEERS

We ask you, as volunteer, to:

- Provide Make A Difference - Wisconsin with current contact and availability information by updating your Profile available by accessing your Volunteer Login on our website. Please respond promptly to the update request Make A Difference - Wisconsin sends to all volunteers annually.

- Respond by email or phone to Make A Difference - Wisconsin 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 Make A Difference - Wisconsin office and the educator, site partner or program contact.

- 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.

- Promptly report any unresolved concern or other issue to the Make A Difference - Wisconsin office so it can be resolved.

- Distribute, collect and review student surveys and evaluations.
• Arrange to return any completed student materials and unused program materials to Make A Difference - Wisconsin within 2 weeks of completing the program.

• Abide by Make A Difference – Wisconsin’s Confidentiality Policy and Anti-Harassment Policy.

RESPONSIBILITIES OF MAKE A DIFFERENCE - WISCONSIN

Volunteers are a valuable resource to Make A Difference - Wisconsin 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, Make A Difference - Wisconsin staff provides:

• A proven and effective program that is kept current, relevant and engaging for students.

• Effective training that is adapted periodically.

• Regular communication with our volunteers, including:
  ➢ Regular e-newsletters
  ➢ Program updates as needed
  ➢ Special communications as needed

• All curriculum and program materials.

• Current contact information so you can reach Make A Difference - Wisconsin staff with questions or concerns.

• Information necessary for you to establish contact with educators, site partners, or program contacts.

• Whenever possible, provide observation and presentation feedback upon your request.

• Prompt response by staff to any concerns that you cannot readily resolve.

• Staff available to provide support in your volunteer service.

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• Recognition through our e-newsletter and at appreciation event(s).

• Tracking and verification, upon request, of your service hours.

CONFIDENTIALITY POLICY
Volunteers are responsible for maintaining the confidentiality of all proprietary or privileged information to which they are exposed while serving as a volunteer, whether this information involves staff, other volunteers, students, teachers or any other Make A Difference - Wisconsin business. Failure to maintain confidentiality may result in termination of the volunteer’s relationship with the agency or other corrective action.

ANTI-HARASSMENT POLICY
Make A Difference - Wisconsin does not tolerate harassment directed at an employee, volunteer, program participant, program partner, collaborating partner or vendor, whether sexual harassment or harassment, because of his/her 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 Make A Difference - Wisconsin 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, Make A Difference - Wisconsin.

CULTURAL SENSITIVITY POLICY
Make A Difference - Wisconsin 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, culture, gender and sexual orientation.

Make A Difference - Wisconsin, recognizing that such diversity is enriching, asks volunteers to demonstrate cultural sensitivity in all settings: training, program presentations, recognition events and any other Make A Difference - Wisconsin activity. This includes, but is not limited to:

• Refraining from using language that could be considered derogatory.

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● 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 or sexual orientation group.
● Engaging in any other behavior or conversation that is hurtful or insulting to any group.

In most cases, if it comes to the attention of Make A Difference - Wisconsin staff that a volunteer has violated the intent of this policy, Make A Difference - Wisconsin will endeavor to discuss the situation with, and provide coaching to the volunteer in order to avoid a future occurrence. In the event the incident demonstrates egregious insensitivity or the volunteer continues to exhibit such behavior, then the volunteer will not be allowed to continue presenting Make A Difference - Wisconsin programs.

SERVICE AT THE DISCRETION OF MAKE A DIFFERENCE - WISCONSIN

Make A Difference - Wisconsin accepts the service of volunteers with the understanding that they serve at the sole discretion of the organization which may, at any time for any time, for whatever reason, decide to terminate the volunteer’s relationship with Make A Difference - Wisconsin. Similarly, volunteers may at any time, for whatever reason, decide to end their relationship with the agency.

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/or the Make A Difference - Wisconsin office in advance.

● Displaying signs of being under the influence of alcohol or other controlled substances when volunteering.

● Violating Make A Difference - Wisconsin’s Confidentiality Policy.

● Violating Make A Difference - Wisconsin’s Anti-Harassment policy.

● Failing to follow the standards of conduct articulated by the school or community based organization.

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ACKNOWLEDGMENT FORM
VOLUNTEER POLICY AND PROCEDURE MANUAL

I have read the Volunteer Policy and Procedure Manual and understand its contents regarding serving as a Volunteer. I acknowledge that I understand and accept the contents of the Manual.

I understand that Make A Difference - Wisconsin may change the contents of this Manual at any time, with or without prior knowledge, and that such revisions will supersede, modify or eliminate existing information and policies.

By checking the box provided on the online volunteer application form in lieu of signature, I acknowledge the acceptance and understanding of the policies and procedures outlined in Make A Difference - Wisconsin’s volunteer Policy and Procedure Manual.
MAKE A DIFFERENCE - WISCONSIN
JOB DESCRIPTION: VOLUNTEER INSTRUCTOR

PURPOSE FOR POSITION:
The mission of Make A Difference - Wisconsin is to provide financial literacy programs and resources that empower high school students to make sound financial decisions. Make A Difference - Wisconsin partners with educators and site partners across Wisconsin to arrange for Volunteers Instructors to present Make A Difference - Wisconsin financial literacy programming to youth in our community.

DUTIES:
The Volunteer Instructor, after his/her application is accepted, must complete Make A Difference - Wisconsin’s training.

The Volunteer Instructor is then matched with classrooms to deliver the program. A program consists of lessons that are presented in a series of 45-90 minute visits; a complete program consists of three two-part lessons that are presented in three and six visits. In most situations, the schedule is determined before the Volunteer Instructor is contacted about presenting the program.

QUALIFICATIONS:
A Volunteer Instructor must: be at least 18 years of age; hold a high school diploma (or equivalent); have access to transportation to the program site; possess basic computer skills; have solid public speaking skills, in English; present him/herself professionally and comfortably to youth; be able to carry 5 pounds and climb stairs.

The Volunteer Instructor is expected to review materials thoroughly and be familiar with the content prior to delivering the program.

LENGTH OF COMMITMENT:
A Volunteer Instructor commits to deliver the Make A Difference - Wisconsin program in its entirety, either alone or with a partner, at least one time each year.

DAYS/TIMES REQUIRED:
Most volunteer opportunities are scheduled during school hours and within the academic year however opportunities are also available during evenings, weekends, and in the summer.

BENEFITS TO VOLUNTEER:
Professional development, enhanced presentation skills, knowledge, opportunity to share information and life lessons, and satisfaction in preparing youth for the future.
MAKE A DIFFERENCE - WISCONSIN
JOB DESCRIPTION: VOLUNTEER COACH

PURPOSE FOR POSITION:
The mission of Make A Difference - Wisconsin is to provide financial literacy programs and resources that empower high school students to make sound financial decisions. Make A Difference - Wisconsin partners with educators and site partners across Wisconsin to arrange for Volunteers Coaches to present Make A Difference - Wisconsin financial literacy programming to youth in our community.

DUTIES:
The Volunteer Coach, after his/her application is accepted, must complete Make A Difference - Wisconsin’s training.

The Volunteer Coach is screened and then matched to a school or community based organization to deliver the program. A program consists of lessons that are presented monthly for an entire school year, generally nine monthly visits.

QUALIFICATIONS:
A Volunteer Coach must: be at least 18 years of age; hold a high school diploma (or equivalent); have access to transportation to the program site; possess basic computer skills; have solid public speaking skills, in English; present him/herself professionally and comfortably to youth, both one-on-one and in a small group; be able to carry 5 pounds and climb stairs.

The Volunteer Coach is expected to review program materials thoroughly and be familiar with the content prior to delivering the program.

LENGTH OF COMMITMENT:
A Volunteer Coach commits to deliver the Make A Difference - Wisconsin program in its entirety, generally nine monthly visits. This commitment is exceptionally important.

DAYS/TIMES REQUIRED:
The days/times of Volunteer Coach programs are routinely scheduled, most often within the academic year and can be during the school day, after school, or in early evening hours.

BENEFITS TO VOLUNTEER:
Professional development, enhanced presentation skills, knowledge, opportunity to share information and life lessons, and satisfaction in preparing youth for the future.

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