

## **AARP Foundation Finances 50+<sup>SM</sup>**

Sponsored by and developed in collaboration with Charles Schwab Foundation

### **Facilitator Volunteer Position Description**

*AARP Foundation Finances 50+* is a financial capability program designed to motivate and empower participants to take charge of their financial future. The program assists individuals to make objective assessments, set appropriate goals and establish habits and behavior that will help them thrive.

This program includes three 90-minute classroom sessions on the basics of finances:

- Goal-setting and budget-planning
- Debt reduction and credit repair, and
- Asset building and protection.

The classroom sessions are led by trained volunteer facilitators.

#### **The Facilitator Role:**

Facilitators lead the in-person workshops. They walk through the material during the sessions while facilitating discussions with participants. Facilitators are volunteers who can offer options for the informed decisions participants will make. They provide guidance and feedback and are tasked with keeping the sessions on track and managing the participants' interaction during the workshop. **While facilitators may be financial professionals, they should not provide specific financial advice.**

#### **The Facilitator most often provides the following services:**

- Guide participants through the Finances 50+ Workbook using the Facilitator Guide.
- Facilitate class discussions and ensure that class sessions start and end on time.
- Provide referrals to additional resources.
- Listen to and track participants' questions and concerns and channel them back to program leadership to be addressed.

#### **Qualifications:**

- Most contact with volunteers will occur via email and the program website so the ability to access the internet, download files, and respond and participate in electronic discussions is important
- Strengths in oral, written communication and presentation skills
- Ability to work independently; self-initiate and prioritize duties, self-monitor performance
- Strong skills in time management and the ability to think on your feet
- Strengths in multi-tasking, good memory for detailed information
- Ability to understand and work well with diverse and low-income populations

- Experience in administration of community programs and/or educational background in human services or financial services is helpful but not required

**Training and support for volunteers:**

- Printed volunteer facilitator's and mentor's guide
- 90-minute in-person training on facilitation and listening skills and how to work with older participants
- Ongoing opportunities for virtual training
- Moderated volunteer discussion board