

MONEY 101 EDUCATION
8.02 First Steps for new Volunteers

Thank you for your application to become a VOLUNTEER financial literacy guide or instructor for MONEY 101 EDUCATION.

The following describes the program, and the next steps should you want to proceed and become a volunteer.



SCORE

Money 101 Education is run under the umbrella of SCORE, a not-for-profit organization that has been a partner of the U.S. Small Business Administration (SBA) for over 60 years.

SCORE’s mission is to mentor, train, and encourage entrepreneurs who want to start a business and coach those already in business to expand and become more profitable. I’ve attached an 8.05 Introduction to SCORE to explain what they do - and suggest you check out their website:

<https://www.score.org/>

I have volunteered with SCORE since 2008, when I retired (young!) after a 32-year career running my own bottled water and office refreshment company. Over the years, I have held many roles within SCORE including being a mentor, workshop presenter, and Chapter Chair. The experience has enriched my life through the clients and fellow mentors that I have met.

MONEY 101 EDUCATION ORIGINS

In 2019, after mentoring over 1,000 aspiring entrepreneur clients, I realized something important: many people have a very limited understanding of money—sometimes even within their own households. This insight inspired me to create a program called **Money 101 Education**.

The goal of Money 101 Education is not only to teach money management, but also to **Take the Fear Out of Finance** (our tagline) and provide a safe, supportive space where people can openly talk about money.

Over time, the program has evolved into five segments (topic areas), each with five two-hour classes. Thus, the entire program consists of 25 classes. Students take one segment at a time. You can see the curriculum of each segment here: <https://money101education.com/curriculum/>

Initially, the program was exclusively for women. In 2025, we also opened registration to men. While it changed the classroom dynamic, it quickly became clear that they needed this information too. Since 2019, over 600 adults have participated; some took just one segment, some took them all.

In 2025, I decided to expand the program by recruiting other instructors. There is currently a woman teaching the curriculum in Spanish. I am now seeking others who are passionate about educating adults in financial literacy, able to complete the training program, and have time to volunteer as instructors or guides and meet the following qualifications.

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VOLUNTEER QUALIFICATIONS:

- Be based in the United States or a U.S. citizen living abroad.
- Have worked for pay and received a W-2 or 1099 income statement within the past five years.
- A background in accounting, finance, taxation, business, and entrepreneurship is helpful, but the training will fill in the gaps. (SEE HANDOUT 8.11)
- Willingness to join SCORE as a “Subject Matter Expert,” complete its separate training program, which involves watching videos and co-mentoring, and signing their code of ethics.
- Have the time mentioned below to embark on the training and maintain engagement over the coming year. (*This is not a one-and-done volunteer opportunity*)

VOLUNTEER TIME COMMITMENT

- Two 30 to 45-minute interviews. One with the Money 101 Education founder (that’s me), and the other with the SCORE chapter administration that is near where you live. Both are done online.
- A 20-hour training program for Money 101 Education - foundation segment. (All new teachers will begin with the FOUNDATION SEGMENT - once you have mastered the material and guided students, you can move on to other segments if you have expertise in that area.) The training consists of listening to five two-hour tapes, doing the assignments, and reading additional handouts. The goal is to put you in your students' or clients' shoes.
- A 12-hour training program for SCORE. The training includes watching several short entrepreneurship videos (5 minutes to 1 hour), learning to use the Engage platform, where SCORE keeps all records of client meetings, signing the code of ethics, meeting with local chapter leadership, and participating in co-mentoring sessions. When you complete the SCORE onboarding process, you will be called a SCORE-certified mentor, Subject Matter Expert (SME), and will focus on the Money 101 Education program.

The above is ideally completed **within eight weeks**. If volunteers do not dedicate ample time to complete the training expeditiously, they tend to lose focus.

After the training and onboarding are complete, you will begin as a MONEY 101 Education **GUIDE**

As a GUIDE, you will be assigned students taking the AYOP (At Your Own Pace) pre-recorded program. You will set up a getting-to-know-you interview to connect with the student and build rapport. Then you send them class videos and assignments. When they complete the assignments, you will review their work and meet with them to answer questions. Your goal will be to build their confidence and make them comfortable talking about money. Building confidence is a key part of the program.

After sufficient experience as a Guide, you have an **option** to be a Money 101 Education **INSTRUCTOR**. As an instructor, you will teach small group classes live online. You can choose the day and time you want to teach, but it should be the same time for five consecutive weeks.

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As the Money 101 Education program is currently being piloted in the North Atlantic section of the United States, you will be assigned clients primarily on the East Coast. Mentoring relationships are very special, and you will build a relationship with your clients. Often these mentoring relationships last for years, long after the class ends.

I hope you will consider joining our Money 101 Education teaching team, and if so, here are the

NEXT STEPS:

1. EXPLORE The website: www.money101education.com
 - UNDERSTAND the Curriculum of the five segments (topic areas). At this time, we are particularly interested in instructors who can teach the **Foundation segment**.
 - WATCH the five-minute video on the homepage where students discuss what they learned.
 - Watch the six-minute video on my instructor page that explains the purpose of the program. You can also learn about my background on that page.
2. WATCH a 45-minute presentation given to Score mentors, which goes through the program in detail, including the curriculum and the Money 101 Education conversational teaching style, which makes this program unique.
https://drive.google.com/file/d/1WQwjo89JEAa7R_GVgc5cZxyqSU3DwnZ-/view?usp=sharing
3. READ handout 8.05, which introduces SCORE, its mission on services. Feel free to share with others.
4. READ handout 8.11, which outlines the knowledge you should have to teach the foundation segment, but don't worry - any gaps will be addressed during training.

Then, if you still have interest:

5. EMAIL your resume, a link to your LinkedIn profile, or a short bio to Diane.Drey@scorevolunteer.org
6. SCHEDULE an appointment to speak with me so we can get to know each other. The link for an appointment is under my signature and here: **BOOK TIME WITH DIANE DREY**
<https://calendly.com/money101education/money-101-diane-drey-private-free-consultation>

When scheduling, please provide your phone number in case I need to contact you in an emergency; it's one of the questions asked during scheduling.

Once you schedule, you'll receive a unique Zoom login for our conversation. (If Zoom is new to you, just let me know—I'm happy to help.) Please be certain to send me your resume BEFORE our meeting.

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I look forward to connecting with you soon.

AND.... if you decide this volunteer opportunity isn't right for you, I'd appreciate a note to that effect, so I don't bother you.

Warm regards,

DIANE DREY
Certified Business Mentor & Workshop Presenter
FOUNDER – Money 101 Education – financial literacy program
SCORE - Member, New York City & Palm Beach County Chapters

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Email: Diane.Drey@scorevolunteer.org

BOOK TIME WITH DIANE DREY

<https://calendly.com/money101education/money-101-diane-drey-private-free-consultation>

LinkedIn: <https://www.linkedin.com/in/diane-drey/>

Learn about Score's FINANCIAL LITERACY PROGRAM

Take the fear out of finance

<https://www.score.org/money-101-education>



**ACCESS THE MONEY 101 EDUCATION
CURRICULUM & HANDOUTS**

HERE: www.money101education.com

RELATED REFERENCES

8.05 Introduction to SCORE

8.11 Knowledge Teachers Need for the Foundation Segment