

MONEY 101 EDUCATION

8.17 Steps to become a certified SCORE Subject Matter Expert (SME) for Money 101 Education

SCORE wants all Money 101 Guides and Instructors to be officially onboarded as **SCORE Subject Matter Experts (called SME in SCORE lingo)**.



Therefore, please follow these steps early in your Money 101 Education training process:

1. COMPLETE A SCORE APPLICATION

Apply online to become a SCORE mentor:

<https://www.score.org/volunteer/become-mentor>

One of the opening questions is “**Why would you like to volunteer for SCORE?** “

In your written statement, you can mention that you are **training to become a SCORE Money 101 Education instructor** under the auspices of Diane Drey of New York City. <https://www.score.org/money-101-education>.

The application will also ask you to upload a **resume** and include a link to your **LinkedIn profile**, so it may be helpful to have those ready.

FYI - HOW SCORE IS ORGANIZED

Score, founded in 1964, has approximately 10,000 volunteers organized into 165 chapters across the United States. For many years, while chapters looked to the national organization for guidance, most activities, including volunteer recruitment and training, workshop programs, and one-on-one mentoring, were managed at the local chapter level.

Over the past few years, there has been a shift toward nationalizing (or at least regionalizing) activities.

In 2025, when SCORE’s federal funding (17 million dollars) was cut, there was an even greater push for consolidation and the creation of unified programming. This approach is referred to as “OneScore”.

With the consolidation, Score is now structured in these layers:

- **1- National (headquarters) - with about 20 paid employees**
- **4 -Regions** (Mid-Atlantic, Southeast, Central, and West) - overseen by Regional Vice Presidents.
- **12 Districts** - overseen by District Directors all volunteers
- **165 + local chapters** overseen by a Chapter Chair or Co-Chairs all volunteers
- **10,000+ volunteer mentors**

Under OneScore, all new volunteer applications are routed to **Regional Intake Coordinators**:

- **Brandon Heisman** — Central and West regions
- **Sabrina Dowson** — North Atlantic and Southeast regions

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The intake coordinator will conduct their own vetting and will assign you to a local chapter based on where you live. (zip code)

2. INTERVIEW WITH YOUR LOCAL CHAPTER

Typically, the local chapter will contact you to schedule an interview within a week. If you do not hear from them in eight days, contact the intake coordinator.

Prior to the chapter live interview, you may send your interviewer the attached handout 8.18 which is an introduction to Money 101 Education and explains your role. Of course, you can add anything else that shows your enthusiasm to help others.

Also make the chapter aware that you were already interviewed by Diane Drey (Diane.Drey@scorevolunteer.org), with the specific task of assisting the **Money 101 Education program**.

Many chapters are aware of the Money 101 program, but not all. You may refer them to the website: <https://www.score.org/money-101-education>

I encourage you to get to know your chapter's leadership, as they can be helpful in many ways. Ask the Chair's name and find out when they will hold their next in-person meeting; if possible, attend.

At a chapter meeting, you will have the opportunity to get to know other dedicated SCORE volunteers and learn about their expertise. When you interact with SCORE clients, you may want to refer them to other mentors when they need help outside your area of specialization.

3. OBTAIN A SCORE EMAIL AND BEGIN THEIR ONBOARDING PROCESS

Shortly after your interview, you should receive an acceptance email designating you as a provisional member, meaning you are in the process of "onboarding".

You should also receive a Score Volunteer email.

Getting the Score Volunteer email is a big step because we want all communication to be done using your scorevolunteer.org email address.

Having a score email also allows you to access "ENGAGE" (Score's volunteer platform), which is where you will be tracking your onboarding. (See below #4)

Once you receive your SCORE email account, please add it to your phone so you can quickly see any incoming messages. If you have difficulties, you can contact the SCORE help desk at: contactus@score.org

Going forward all communication with Diane, other Money 101 Education SME's, mentors, and clients, should be done using your Score email address.

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4. COMPLETE THE ONBOARDING CHECKLIST

To move from **provisional member to certified mentor** (and to teach Money 101 Education), you will need to complete the **SCORE Onboarding Checklist**, which is below.

This involves watching several videos including a program called “Simple Steps,” which are all on SCORE’s **ENGAGE platform**, which you can access once your SCORE email is set up.

Volunteer login: <https://www.score.org/volunteer-login>

Two items on the checklist can take a little extra time as they rely on the chapter (human) intervention:

- **Participate in at least three co-mentoring sessions**

This means sitting in on client sessions with other mentors. Most sessions are done online. Some chapters arrange these quickly, while others take longer. If you are not receiving invitations to participate, be proactive and reach out to the chapter chair or the intake coordinator.

- **Complete the local chapter orientation**

This may involve attending a chapter meeting or participating in local SCORE workshops. Each chapter handles this slightly differently. **Clarify what is expected during your chapter interview.**

Onboarding should be completed within four weeks.

When you have completed all the steps, notify the Regional Volunteer Intake Coordinator, who will verify the information you provided and inform you when you are a certified SCORE SME MENTOR.

Also inform Diane Drey that you have completed your SCORE onboarding and note it is time to celebrate!

SEE NEXT PAGE for SCORE SME MENTOR ONBOARDING CHECKLIST

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PROVISIONAL VOLUNTEER ONBOARDING CHECKLIST



<i>Use this document to easily track your training progress</i>	
Provisional Volunteer: Provisional Volunteer Phone: Provisional Volunteer SCORE Email (SVO): Regional Volunteer Intake Coordinator (RVIC): RVIC Email:	Reminder: All SCORE business must be conducted using your SCORE email (SVO) and not personal email.
Coach Name: Coach Phone: Coach SVO:	Find your RVIC on the SCORE Support Center here Your RVIC will introduce you to your Coach via email once you have completed your online training modules.

TRAINING REQUIREMENTS LIST	Documents and Links, if applicable	Status/Notes
Complete the required online training modules		
You can find these courses by logging in to Engage and then selecting "Access Online Learning" from the right-hand menu on the homepage	How to Access SCORE Training in Engage	
a. SCORE Training 001 Volunteer Orientation (12 minutes)		
b. SCORE Training 002 Mission, Vision, Values (7 minutes)		
c. SCORE Training 003 SCORE Today (7 minutes)		
d. SCORE Training 004 Annual Code of Ethics (15 minutes)		
e. SCORE Training 005 Mentor Certification (60 minutes in total - 5 parts)		
f. SCORE Training 006 Introduction to Engage (12 minutes)		
g. SCORE Training 007 Measuring Success. (10 minutes)		
Complete Simple Steps to Starting Your Business workshop		
Complete the Simple Steps to Starting Your Business 5-module course (60 minutes) - this workshop can be found in the same place as your original training modules by selecting "Access Online Learning" > "All Courses" and scrolling down to module 009 SCORE Workshop: Simple Steps to Starting Your Business	How to Access SCORE Training in Engage	
Complete volunteer profile in Engage		
"Volunteer Information Displayed on the Website" and "Volunteer Demographics" sections are required - the latter is used for reporting purposes and most fields include a <i>Choose Not to Respond</i> option if you would prefer not to provide specific information	How to Update Your Profile in Engage	
Participate in at least 3 co-mentoring sessions - if possible, participate with 3 different Mentors		
1st Lead Mentor / Date of Session:		
2nd Lead Mentor / Date of Session:		
3rd Lead Mentor / Date of Session:		
Complete Mentoring in Engage training session		
Watch the Zoom recording found on SCORE Support Center (21 minutes)	Training Recordings on SCORE Support Center	
Complete Local Orientation		
With your assigned Coach, review chapter specific information such as introductions to local leadership, chapter meeting schedule and commonly used resources (including Google Drive, Business Model Canvas webinar, etc.). Review client meeting preparation and best practices, and other topics as necessary.	Mentoring Definition, Standards and Expectations	
Overview of SCORE & available resources		
May be reviewed as part of Local Orientation above		
a. SCORE Website - familiarize yourself with how to find content	www.score.org	
b. SCORE Support Center - how-to's and informational articles	supportcenter.score.org	
c. SCORE's Policies and Procedures & SCORE's Operating Manual (SOM)	Support Center: Policies & Procedures	
Sign Workshop Presenter Guidelines and return to RVIC by email		
Required for those who plan to serve as Workshop Presenters, optional for others	Download WSP Form	
Notify RVIC that all items have been completed		
<i>Any questions? Reach out to your RVIC or contact volunteer.services@scorevolunteer.org</i>		