

## MONEY 101 EDUCATION

### 8.18 Introduction for SCORE chapters onboarding SCORE SME Money 101 Education volunteers

TO SCORE Chapter Leadership:

Please find enclosed an application for a new volunteer to join your chapter as a SCORE Subject Matter Expert (SME).



The applicant is not intending to be a general SCORE mentor but will support SCORE's Money 101 Education program.

#### **ABOUT MONEY 101 EDUCATION**

If you are not already familiar with the program, we encourage you to review the overview page: [Money 101 Education Overview](#).

You may also find it helpful to view this 45-minute presentation for SCORE mentors: [Money 101 Mentor Presentation](#)

Money 101 Education is a five-segment, 25-class personal financial literacy curriculum designed to help individuals build a strong financial foundation in preparation for entrepreneurship. Developed by Diane Drey of the SCORE NYC chapter, the program has been delivered successfully since 2019.

In 2026, SCORE will roll out the program as a pilot in the North Atlantic region, although volunteers and clients can come from anywhere in the United States.

The Money 101 Education curriculum is organized into five topic areas, each with five classes. Participants enroll in one segment at a time and are encouraged to start with the Foundation segment, which covers income (W-2 and 1099), taxation, employment benefits, cash flow, personal financial statements, and credit—core building blocks for aspiring entrepreneurs.

#### **THE VOLUNTEERS ROLE**

Volunteers will assist in two roles:

- **Money 101 Guide (for AYOP – At Your Own Pace)** – Supports SCORE clients enrolled in the self-paced (pre-recorded class) program. Meeting with them to review assignments and answer individual questions. All volunteers will start in this role.
- **Money 101 Instructor** – Delivers the curriculum to small groups in an online live workshop. This will occur after sufficient experience working one-on-one with clients.

This applicant has already been interviewed by Diane Drey and is currently undergoing training in the Money 101 Education curriculum, with the intent to start as a Guide.

However, SCORE National requires that Money 101 Education volunteers become certified SMEs and complete the full SCORE onboarding process. The reason is two-fold:

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- As part of their duties, they will meet privately with clients to review assignments and subject material. They want to be assured they are fully onboard with the SCORE's methodology and code of ethics.
- They want the volunteer to only use a Score email address when communicating with clients.

As this volunteer resides within your geographic area, we respectfully request your assistance in facilitating and expediting their onboarding into your chapter.

While the applicant may not have a traditional entrepreneurial background, their role will be **limited to delivering Money 101 Education**. They will not be providing general business mentoring, nor should they be referred to any direct clients.

However, as part of the certification process, they will need to observe and participate in three mentoring sessions. Please choose clients who need assistance with financial literacy so the new volunteer can be helpful.

When evaluating the volunteer, the key consideration is understanding the role. We expect them to be fully knowledgeable about the curriculum, to be a good communicator, and to be dedicated to client success.

Finally, Diane Drey **welcomes** your feedback on this volunteer. Your perspective is important. After interacting with the volunteer, please contact Diane Drey directly at [Diane.Drey@scorevolunteer.org](mailto:Diane.Drey@scorevolunteer.org).

Thank you in advance for your support and cooperation.

Best regards,

Diane Drey  
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And the SCORE Volunteer Coordinators:

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