



Columbus**Saves**

You Can Build Wealth



Become involved with Columbus Saves!!



Volunteer Interest Form

Please complete and return to:

Susan S. Shockey, Ph.D., Columbus Saves Chair

OSU Extension, Franklin County, 2105 S. Hamilton Rd, Suite 100

Columbus, Ohio 43232

shockey.3@osu.edu

Phone: 614-866-6900 (206) FAX: 614-868-8280

Name _____ Phone Number _____

Street Address _____

City _____ Zip Code _____

E-mail _____ FAX _____

Occupation _____ Employer _____

Would you like to be a part of Columbus Saves as an organization or as an individual?

For details about the types of involvement available, please see attached descriptions then select your desired role by checking one of the following boxes.

Organization

- Host organization
(Specify site) _____
- Columbus Saves planning group member
Committee of Interest:
 - Marketing
 - Education
 - Finance
- Financial Institution

Individual

- Wealth Coach
- Workshop Speaker
- Site Coordinator

-Over-

Background

- I have experience speaking before groups
- I have experience counseling or working with people
 - Financial
 - Other
- I have experience managing or coordinating programs or activities
- I have experience with marketing
- I speak a language other than English (Specify) _____

I would like to work with the following tasks

- Exhibits at conferences, fairs, and community gatherings
- Team teaching financial management to groups in the workplace or community
- Marketing brochures, flyers, and print media
- Working with broadcast media (radio, TV)
- Developing a local web page, list serve, database or other computer applications
- Development of funding or other campaign resources

Times Available

- Week Days (Circle Days Preferred) M T W Th F
- Week Evenings (Circle Days Preferred) M T W Th F
- Weekends
- As needed depending on Schedule

Other Information You Would to Share

Columbus, Ohio Saves - Procedures

Volunteer Roles and Responsibilities

Contact Person – Susan S. Shockey, Ph.D. OSU Extension Educator, Family and Consumer Sciences, Franklin County

Wealth Coach

- 1) At the motivational workshop, the wealth coaches (2 will attend each motivational workshop) will describe their roles and responsibilities
- 2) Explains their availability to Columbus Savers is immediate – at the workshop, and longer term – available by phone
- 3) Explains the enrollment form and process
- 4) Can assist with defining goals and completing enrollment forms during the enrollment portion of the workshop
- 5) During the enrollment portion of the workshop, savers can have a one-on-one meeting with a wealth coach to help with completing enrollment form, defining and prioritizing goals, budgeting, saving, and debt reduction plans, suitability of Columbus Saves products for their individual situations, and referrals to appropriate outside resources
- 6) Collect enrollment forms and put in sealed envelope and give to site coordinator to submit to Columbus Saves home office.

Motivational Speaker

- 1) **Each workshop is attended by a Columbus Saves motivational speaker and two (2) wealth coaches**
- 2) **At the motivational workshop, Columbus Saves motivational speaker will:**
 - a) **Engage audience to think about personal wealth and goals**
 - b) **Present a true success story**
 - c) **Describe Columbus Saves program**
 - d) **Outline free and confidential benefits of membership**
 - e) **Define requirements of membership**
 - f) **Introduce wealth coaches**
 - g) **Close workshop by inviting participants to make a commitment to themselves**

Site Coordinator

- 1) **Host site assigns site coordinator**
- 2) **Site Coordinator attends an orientation session - forms are completed in “Host Site Organizational Packet”**
- 3) **Creates and submits “Site Marketing Plan” document to Columbus Saves office**
- 4) **Schedules wealth building workshops by contacting Columbus Saves co-coordinators**
- 5) **Recruits participants from their sites to attend wealth building workshop**
- 6) **Receives enrollment forms from wealth coaches and submits them to Columbus Saves either by dropping them off at the office or by mailing them**
- 7) **Facilitates the establishment of a Wealth Builders Club**