

## Valley of the Sun United Way Financial Coaching Training & FSP Online Client Tracking System

### Valley of the Sun United Way is offering Financial Coaching Training to its Partners

Valley of the Sun United Way (VSUW) is committed to increasing the financial stability of low-income families. VSUW is offering Financial Coaching Training to our partner agencies as part of our three coordinated strategies to empower 100,000 individuals in Maricopa County to become more financially stable by 2020.

### What is a Financial Coach?

Financial Coaches work with individuals as they move to financial self-sufficiency. Coaching is designed to create short-term results as well as to build the long-term capability of clients, leaving them more resourceful for the future.

### What is the Financial Coaching Training?

Valley of the Sun United Way's Financial Coaching Training is an intensive, interactive, hands-on training that assists participants to develop coaching competencies and a deeper understanding of financial content. This **32 hour-long** training is highly interactive and allows participants to develop coaching skills and gain the knowledge and tools they need to easily integrate financial coaching into their daily work with clients.

### Participants will learn coaching competencies in:

- Co- creating the Relationship: having a coaching presence
- Communicating Effectively: active listening, powerful questioning, direct communication
- Facilitating Learning and Results: creating awareness, designing actions, planning and goal setting, managing progress and accountability

### Financial competencies participants will learn include:

- Determining Personal Financial Priorities
- Beliefs and Values around Money
- Surviving Debt; Money Management; Household Budgeting
- Understanding a Credit Report and FICO Score
- Repairing Credit and Improving Your FICO Score
- Risk Assessment; Social Security; Wills and Powers of Attorney
- Using a Financial Calculator to calculate money over time

### Who should attend this training?

The financial coaching training is for nonprofit staff, government staff, and/or volunteers who work directly with clients or who manage programs that provide client support, such as case managers, program specialists, and program directors.

### What does this training cost?

The training is valued at over \$1,000; however, VSUW is offering this training to its partners absolutely free.

## When is the training? The next trainings are scheduled for:

- **Session 1** – Thursdays: July 13, 20, 27, and August 3, 2017
- **Session 2** – Thursdays: September 7, 14, 21 & 28, 2017
- **Session 3** – Wednesdays: October 25, and November 1, 8, & 15, 2017
- **Session 4** – Thursdays: January 11, 18, 25, and February 1, **2018**
- **Session 5** – Wednesdays: March 7, 14, 21, & 28, **2018**
- **Session 6** – Thursdays: May 3, 10, 17 & 24, **2018**
- ❖ *Continental Breakfast and Lunch will be provided each day of training. Breakfast will begin at 8:30am, classes will run from 9:00am until 5:00pm.*

## Where is the training?

Valley of the Sun United Way, 3200 E. Camelback Rd, Suite 375, Phoenix, AZ 85018

## What are VSUW expectations for training participants?

- Participants are expected to attend **all four days** of training to receive certification
- Agencies who send staff to this training **must be willing** to capture financial stability outcome measurement data using the VSUW FSP Online Client Tracking System

## What is the FSP Online Client Tracking System?

VSUW's FSP Online Client Tracking System is a secured web-based system which provides shared measurement in tracking clients' financial goals and accomplishments. The FSP System tracks individual client data, including:

- Demographics
- Financial Assessment
- Financial Goals
- Goal Achievement
- Improving Financial Stability

## What are the benefits of using the FSP Online Client Tracking System?

- The FSP System allows agencies to track client's financial health and improved financial stability
- The FSP System generates reports, including data downloads, aggregate reports and timeframe reports.
- Use of the FSP System allows for participation in a larger network of providers collecting shared measurements – showing impact county-wide
- Use of the FSP System allows for access to VSUW's Financial Stability Services, including the Financial Coaching Training, the Financial Stability Toolkit, and Network Convening
- The FSP System is easy to access; it's web-based and accessible from any computer

## How do you enroll in the Financial Coaching Training?

Interested parties should email Millie Ho at [mho@vsuw.org](mailto:mho@vsuw.org) to register for the class. Please send your name (1st and last), title, agency, phone and email contact information