

Financial Coaching Program Development and Management

Inclusiv is offering trainings to meet the needs of credit unions at different stages of developing, operating and/or strengthening their financial coaching programs. These cohort-based training courses will provide credit unions with the knowledge, skills, and tools to develop, implement, and operate their credit union's financial coaching programs.

In the *Financial Coaching Program Development & Management* course, participants will learn best practices for developing and operating a high-impact credit union financial coaching program. The course will lead and support participants to create a plan to either launch a new financial coaching program or grow an existing program at their credit union. This course is free and available to Community Development Credit Unions (CDCUs).

Course Details

This course will consist of six (6) 90-minute virtual sessions held on Tuesdays at 2:00pm ET between October 3 – November 14, 2023 (no class on October 24th). Credit unions who are accepted into this course should expect to have identified two staff members who can commit to attending the live sessions and have 1 – 2 hours per week to complete additional assigned readings and exercises between sessions.

Course Requirements

- Reliable internet connection
- Device capable of accessing Zoom and Google Classroom
- Video and audio equipment (camera, speaker, microphone)
 - A second screen/monitor is not required but recommended, if available.
- Please note this course is currently only offered in English.

Who Should Apply

- Credit unions who are interested and ready to develop and launch an in-house financial coaching or counseling program.
- Credit unions who currently deliver some or ad-hoc financial coaching or counseling and hope to expand or grow their programs.

This is a mid-level course. Credit unions who have little to no experience developing and delivering financial empowerment services should consider taking the *Introduction to Financial Empowerment* course prior to applying for the *Financial Coaching Program Development and Management*. CDCUs who already deliver robust and expansive financial empowerment services, including financial coaching services should consider joining the [Financial Empowerment Network](#) to access ongoing peer networking opportunities, financial coaching and empowerment resources and concepts.

For additional questions, reach out to [Megan Bolado](#), Inclusiv Director of Financial Empowerment.

To apply, complete this application by September 12th. Accepted credit unions will be notified by September 19th.