<u>R&R Standard Coaching Process</u>

I. Initial Contact

You may make contact with students in many ways: tabling, an FSA tax lab, drop-in inquiry, a call, an email, an in-office or interdepartamental referral, or a sign-in sheet from a workshop or classroom presentation. It is important to get the right information to establish your first meeting.

- Obtain, at very least, the student's name (First & Last) and contact (phone or email)
  - Create "New Inquiry" in ChangeMachine and enter the student's information

- If possible, also ask what services/topics the student is interested in
  - FAFSA/WASFA Help
  - Public Benefits
  - Budgeting, Savings, Banking, Credit Building
  - Credit Report Pulls & Reviews
  - Goal Setting, Values Assessment, General Money Knowledge
  - Other

- Give them your card and tell them you'll get in contact to set up or confirm appointment

II. Preparation for First Appointment

- On the morning of or day before your scheduled appointment, send a confirmation/reminder by calling, texting, or emailing

- Prepare resources to use during the appointment
  - Tailor resources if you know what they would like to discuss
  - Assemble a basic folder if the student has interest in coaching; refresh your knowledge on specific topics they'd like to cover; print relevant worksheets and assmble flyers you believe may be relevant
  - Have extra resources ready in case the student expresses interest in other topics

- Bring pens and your surface to the meeting location you determined with the student
  - Arrive 5 - 10 min early. Take the time to open a doc for notes and any online resources
  - Open the student's ChangeMachine account, set up a new appointment, prepare the Action Deck with items you intend to addres, and open to the Intake Questionaire

III. First Appointment

- Welcome the student; ask how they're doing; get comfortable. Remember to be human!

- Let them know that before you get started, you want to establish a couple things:
  - <u>Confidentiality</u>: whatever they say stays with you. You won't share any personally identifiable information

- Expertise: you are a coach, not a counselor. You're an Americorps member trained in benefits, FAFSA, tax, and financial literacy; you're knowledgable about a select number of topics relevant to many students, but are not an expert. You're able to provide resources, brainstorm, and help the student achieve their goals. Though you may not be able to answer to some questions, you're happy to help find people that can.

- Tell the student about what you have to work with
  - Give them their folder; give them a brief walk-through of the resources inside
  - Walk through any additional resources you may have provided, such as credit building resources or web pages you've pulled up (credit report pull, benefits calculator)

- Ask the student where they would like to start, and what they'd most like to get done today
  - Take notes on what the student wants to accomplish.
  - Follow their lead!

- If relevant, encourage the student to fill out an Action Plan before the end of your meeting
  - Write down what the student has committed to and when they want to accomplish it by
  - Ask the student if they would like you to check in with their progress

- If relevant, determine a time and place for a next meeting

IV. Follow-Up & Post-Appointment

- Within one day, send the student a summary email of your meeting
  - Thank them for taking the time to meet
  - List the topics you discussed and what you accomplished in each topic: include links
  - List the goals and action items the student established, with their "accomplish by" dates
  - Restate what you committed to in terms of follow-up and/or next meetings

- Document all actions completed with the student by creating items on the student's Action Deck
  - If no pre-made option exists for a task addressed/completed, create Custom Action
  - Move items into approriate columns: On Deck, Next Check-In, Doing, or Done

V. Subsequent Appointments

- Text, email, or call the student the afternoon before or morning of the day of your appointment to confirm time/place and to touch base on anything they should bring along (i.e. their folder)

- Start the meeting by reviewing what was done at last meeting
  - Follow-up on any action items if you've not done so by email/phone since last time
  - Ask about resources you discussed: did they work? What was helpful? This is good information both for you to use with subsequent clients and moving forward with them

- Ask the student what they'd like to work on and what they'd like to accomplish
  - Repeat remainder of process & follow-up from first meeting
  - Don't assume that students want subsequent meetings; ask, and keep good follow-up
  - Check in about goals; celebrate accomplishments; offer future contact before closing off