Financial Coaching Network
Bi-Monthly Peer Call

June 27, 2019, 3-4:30 PM ET

Today’s Topic:
Supporting Coaches
Welcome

Carmen Shorter
Senior Manager for Learning, Prosperity Now
Housekeeping

- This call is **being recorded** and will be mailed to registrants and available online within one week.

- **This is a group discussion!** However, all webinar attendees are muted at the start to ensure sound quality.

- **Share comments or ask questions** at any time by raising your hand to be unmuted or typing the question into the text box on the control panel.
  
  *Tip: Phone audio works best.*
  
  *Be sure to enter your audio PIN!*

- If you experience any technical issues, email **gotomeeting@prosperitynow.org**.
Getting the Most Out of Today’s Call

- Join from a **quiet space**
- Grab a **coffee** or snack and settle in
- **Engage!** Send us your questions and comments as you listen
- **Reflect** on ways to apply what you learn today to your own work
Today’s Agenda

✓ Exploring Today’s Topic – Supporting Coaches
✓ Panel Discussion – We’ll hear from a few of your peers
✓ Group Discussion – What’s your experience?
✓ Next Steps & Close
Context-Setting

Hiba Haroon
Associate Director,
Savings & Financial Capability
Prosperity Now
Survey Results

- What are the strengths and values you bring as a manager?
  - Servant leadership, lead from behind
  - Support and flexibility to our coaches
  - Provide educational opportunities, trainings, referral support to coaches
  - Lots of experience in the nonprofit field
  - Previous direct service experience
  - Data driven decisions
  - Kindness
  - Willingness to listen
Survey Results

▪ What are the challenges your organization experiences in supporting coaches?
  ▪ Limited funding—impacts number of staff, finding affordable advanced coaching trainings
  ▪ Meeting multiple grant/funder guidelines
  ▪ Not being able to offer coaches feedback on their coaching skills
  ▪ Volunteer coaches: Data tracking, getting coach/client meetings scheduled
  ▪ Not having a sense of all the resources out there
  ▪ Middle management unable to provide direction to the organization
Survey Results

How do you/your organization invest in coaches?

- Trainings, trainings, trainings!
- Professional development opportunities
- Conferences
- Volunteer coaches: being available to support them
Introduction to the ADKAR Model
What is ADKAR?

- ADKAR is a goal-oriented change management model that guides individual and organizational change.
- 5 outcomes for lasting change:
  - **Awareness** of need for change
  - **Desire** to support the change
  - **Knowledge** of how to change
  - **Ability** to demonstrate skills and behaviors
  - **Reinforcement** to make the change stick
Phases of ADKAR

The People Side of Change

Awareness  Desire  Knowledge  Ability  Reinforcement

Successful Change

Business need  Concept & design  Implementation  Post-implementation

Phases of a Change Project

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Practitioner Discussion

Fran Rosebush Baylor
Director, Field Engagement
Prosperity Now
Today’s Guest Speakers

Molly Ornati
Associate Program Manager, Asset Building
Bedford Stuyvesant Restoration Corporation
mornati@restorationplaza.org
Brooklyn, NY

Claudia Holt
Financial Capability Manager
Prepare + Prosper
claudia@prepareandprosper.org
St. Paul, MN
Common Challenges Faced by Programs

- Emotional burnout
- Professional development and on-going staff/coach training
- Metrics—pressures to collect, time associated with data collection, what type of data to collect
- Programs with a volunteer coach model
Bedford Stuyvesant Restoration Corporation (Brooklyn, NY)

Molly Ornati
Associate Program Manager, Asset Building
Bedford Stuyvesant Restoration Corporation

Challenges

▪ Pressure to Fill Metrics & Enter Data
▪ Emotional Burnout
▪ Professional Development & Ongoing Training
Prepare + Prosper (St. Paul, MN)

Challenges

▪ Emotional Burnout
▪ Professional Development & Ongoing Training
▪ Volunteer Coach Model

Claudia Holt
Financial Capability Manager
Prepare + Prosper
Practitioner Discussion

Fran Rosebush
Baylor
Prosperity Now
Washington, DC

Molly Ornati
Bedford Stuyvesant
Restoration Corp.
St. Paul, MN

Claudia Holt
Prepare + Prosper
St. Paul, MN
Open Discussion

Carmen Shorter
Senior Manager for Learning,
Prosperity Now
Group Discussion Technology

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What questions do you have?
Share them in the Questions box!
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Next Steps

▪ Please **complete the survey**!

▪ Sign up for other **Networks and Campaigns** to stay in the know about issues you care about

▪ Let us know your **suggestions** for future call topics

▪ Volunteer to **lead** a future call!
Join us for a fun summer learning experience focused on building coalitions and engaging in advocacy this election cycle!

For more details, sign up for one of our advocacy campaigns at prosperitynow.org/take-action
Expand Your Networks with the Prosperity Now Community

Sign up for listservs and working groups, volunteer to facilitate peer discussions, serve in a leadership role—and more!

- Affordable Homeownership Network
- Campaign for Every Kids Future (Children’s Savings Accounts)
- Financial Coaching Network
- Innovations in Manufactured Housing (I’M HOME) Network
- Medical Financial Partnerships (Health/Wealth)
- Racial Wealth Equity Network
- Savings Network
- Taxpayer Opportunity Network (VITA/community tax prep)

Visit any of the above Networks at prosperitynow.org/get-involved to get started.
Take action with Prosperity Now Campaigns!

Sign up to stay informed about the latest developments and opportunities to take action by joining one of our four federal policy campaigns.

**AFFORDABLE HOMEOWNERSHIP**

Homeownership is key to building wealth. Together, we will advocate for products and policies that provide more affordable homes to more people.

**CONSUMER PROTECTIONS**

Consumer protections create more fair, more transparent financial markets. Together, we will ensure consumers keep the safeguards they deserve.

**FINANCIAL SECURITY**

Safety net programs help protect vulnerable individuals and families from falling deep into poverty. Together, we will protect programs like SNAP, IDAs and more to help those in need when they need it most.

**TURN IT RIGHT-SIDE UP**

The vast majority of tax incentives go to those at the top, not to those who need it most. Together, we will turn our upside-down tax code right-side up.

Visit any of our Campaigns at [https://prosperitynow.org/take-action](https://prosperitynow.org/take-action) to learn more and join.
Thank You!

Please complete our survey and we’ll see you on the next call!