



## Integrating Innovative Employment & Economic Stability Strategies (IIEESS) Webinar Transcript:

### Coaching for Success Quarterly Affinity Call

Date: July 12, 2018

**MEGAN YARBER:** Hello everyone, welcome to today's webinar. The IIEESS Coaching for Success Quarterly Affinity Call. My name is Megan Yarber and I will be the moderator for today's webinar. Before we get started I want to review a couple of housekeeping items with you and explain how you can participate in today's session. When you joined today's call you may have noticed that you have been placed into Listen Only mode. If you have questions that you would like the presenters to address, please submit them using the Q&A box located on the right-hand side of your WebEx window.

When you logged into the webinar, your screen should have looked like the area to the top right-hand side of my slide. You should see a section where you can both chat or submit questions. Even though both sections are available to you, please submit all of your questions only using the Q&A box. You also have the ability to change the view on your screen. To change your view, please select the Full Screen double arrow button located in the same window as my presentation. You can see this highlighted on the slide to the right. To exit Full Screen mode, hover your mouse at the top of your screen and select the blue Return button from the dropdown menu that appears. If the presenter's video box is covering part of the presentation, hover over the top left corner of the box and click on the arrow to minimize it. Today's webinar will also have other features including a file transfer. Please note that today's webinar will be recorded. If you experience any difficulties during the webinar, please call the WebEx customer service number at 1-866-229-3239, option One. Now I would like to introduce Damon Waters, Program Specialist with the Office of Family Assistance. Damon?

**DAMON WATERS:** Thanks Megan, and good morning or good afternoon to everyone. I'm glad everyone was able to make their way to today's Affinity Call. We've had great experiences working with all of our sites within the IIEESS community of learning, and we're very excited to have Washington D.C.'s team to come on and talk about the activities they've been investing in even before the community of learning with regard to their targeted mobility coaching program. So instead of taking too much time, I want to just bring on Ms. Agnes Venson, who is the Supervisory Vocational Development Specialist for the TMC team and the Department of Human Services Office of Work Opportunity and Family Resource Center. Agnes?

**AGNES VENSON:** Hello, good afternoon, everyone. So to get started on the overview of the presentation we will have the D.C., we will speak about the D.C. TANF program and then we will talk about our targeted mobility coaching model, follow up with key principles, and program goals. We will also have a customer here for a customer self-testimonial and of course Q&A.

So to get started, the D.C. TANF program, we, from February up to now, we have assisted 11,830 families and 20,000 children. So we are proud of the work that we do here at DHS. First we're going to talk about some key policy changes that we've experienced here at DHS. As you can see here on your screen, effective April 1 of this year there was no time limit, which means that families receiving TANF... the time limit was eliminated. As

well as increased benefits for customers that are longer than 60 months on TANF, those benefits were increased, as well as reduced sanction, which means not more than 6% of the entire household will receive a sanction in that household.

Just a little bit of background on that. The District TANF program has evolved over the last six years, and we had three challenging, you could say, "a punitive element," which included a three level sanction with a grant reduction of 20%, 60%, 100% for noncompliance. As a result, the DHS looked at that and realized that that was unacceptable without a hardship extension. So what we did... we formed work groups to provide recommendations to our mayor on a new policy to address this issue. The work groups included customers, providers, advocates, council members and their staff, as well as DHS employees. That's how we came up with these three changes here. The work groups to get the customers' buy-in; we hosted four listening sessions, four community dialogues, and three working group sessions. So we're just excited about how we're able to keep that cash into the household.

DHS has always used a person-centered service delivery, as you can see on your screen. As you notice here; that the top layers, the applications, and TANF comprehensive assessments, the first thing we do for our person-centered service delivery. Followed by that we have our individualized responsibility plan which you will hear a lot about during this presentation, and of course our support services and our service delivery, and what we found, that you see highlighted here, is barrier remediation with our families. We really wanted to work with them with their stressors and their barriers. So that's kind of led us into the discussion about the coaching model, and that's how we begin to work targeting mobility coaching. So speaking of coaching, here's a little bit about DHS's coaching timeline.

So after this slide, we're going to have a poll question number one and then followed by that, Jennifer Lowe from EMPATH will finish our DHS coaching history timeline. So, get started on how coaching evolved for us. In June 2016, the current Program Manager at that time felt the need to expand our services; to expand our services to be more involved, even more person-centered with our families. So a team was formed which included staff and we created a presentation. The presentation was given to management, and management instantly approved. They were excited about the idea how we can work to get families more engaged, to help them through their stressors and barriers, and be even more person-centered. In July 2016, we began our staff recruitment and we had extensive training. Training; such as how coaching can enhance case management, family development, and family-centered approaches. Unified case planning, home visits, community visits, ECO mapping... we did extensive training with that staff. In August 2016, that's when we decided to distribute the case load and start our coaching process.

Our next slide, before we get to our next slide, we're going to have a polling question here. And the polling question is "Which of the following have you offered or are planning to offer staff members to support coaching practices?" So, which of the following training. So, we'll give you time to answer then we will move forward with Jennifer Lowe from EMPATH and she will finish out the DHS coaching history timeline.

So we will continue, and so I would like to introduce Jennifer Lowe from EMPATH.

**JENNIFER LOWE:** Hi, everyone. Thanks, Agnes. This is Jennifer Lowe, I'm from EMPATH and I've been working on the IIEESS project on the coaching team serving Washington D.C. DHS along with Azaliah Israel from Public Strategies. At EMPATH, I oversee the Economic Mobility Exchange, which is the learning network of about 85 different non-profit organizations and government agencies who are wanting to really learn together about our Mobility Mentoring model and share best practices and resources to really support one another in our efforts to help families and individuals in their journey to be able to reach economic self-sufficiency. And it was through the exchange learning network that I first connected with DHS. So as Agnes shared, the department had already been making a shift into their person-centered coaching throughout the summer of 2016.

That fall, Deputy Director Tamatha Davis-Christian learned about EMPATH's exchange from colleagues of her's at the Center on Budget and Policy Priorities and at The Mom's Project. So she reached out to us and she was really interested in joining the network to learn more about EMPATH's Mobility Mentoring model and to really

seek some additional support with the department's coaching initiative. So they were, as you heard, were starting to refocus their services to a coaching approach. The department joined the network in February of 2017, which allowed them to be able to access our monthly webinars and online member portal with resources and tools and to also access some training and consultations.

So, DHS contracted a series of monthly consultations to be able to help plan with their implementation of their Mobility Mentoring-informed model, and so the consultations ranged from research and shared data to virtual live demonstrations of using the tools, like the Bridge to Self-Sufficiency. Then in the summer of 2017, EMPATH had the opportunity to visit the TCM and Bridges team in D.C. to facilitate a two day foundational training called Mobility Mentoring Essentials. This training is really designed for direct service staff to help them understand some of the theories and the perspectives such as how chronic trauma and stress can really impact our executive functioning skills; to really understand these perspectives that inform the Mobility Mentoring model, as well as do some hands-on practice using the Bridge and goal-setting tools and coaching approaches.

After the training, we continued with the monthly webinars to be able to provide some additional support throughout the implementation process. Then in 2018, through the IIEESS project, we were able to continue our work with supporting the department's coaching initiatives. They are focusing on two goals: they're strengthening the current coaching strategies, and then incorporating a two-generational approach into their programming. So through the IIEESS initiative, this spring we were able to provide the TCM and Bridges teams with an advanced coaching training and some additional coaching and supervision to support and really build off a really strong foundation that they've already started to build, they've already created. So we were able to take it, I think, to the next level with them and build upon their great work. Agnes, next slide, please. Thank you.

So we thought it would be helpful to provide a little bit of context on the Mobility Mentoring model. So I'm just gonna share it very briefly with you all. Mobility Mentoring, it's a goals-based coaching approach and suite of tools that are informed by research that shows that poverty causes chronic stress which can act really as a roadblock to progress; really preventing people from being able to plan for their future success. So, Mobility Mentoring really aims to overcome these extreme stressors of poverty by improving focus, planning, decision making. It's designed to help people set and achieve future-oriented goals despite all of the immediate challenges that they're experiencing with poverty.

So what you see on the screen here is what we would consider the four essential elements of Mobility Mentoring. The first is the Bridge to Self-Sufficiency. This is a one-page tool that's used to engage people in a conversation to really help them chart their path to economic self-sufficiency. It helps families and individuals plan and reach and sustain their personal goals in what we would consider five essential areas in their life. Those are family stability, well-being, education and training, financial management, and employment and career management. Just by opening up conversations in each of these five areas, the Bridge actually allows people to see how each of those five areas or domains can impact each other, and it reinforces this, what we would call, contextual decision making. It helps people to become future-oriented. In the slides to follow, Agnes is going to be able to share the Bridge that they're using down in D.C. and how the department is using it as not only a tool in practice along with the folks that they're serving but also a tool that they're using to measure and assess outcomes.

The second essential element is goal-setting. So after the initial Bridge conversation to kind of get a sense of where people are at in each of those five domains, the conversation tends to naturally pivot to where they want to go and Coaches are able to work with people to uncover their goals and their dreams and start beginning to think about the areas that they want to prioritize and how Coaches can best support them and help strategize to really create a very concrete plan to achieve that goal. And so this process is then supported through goal worksheets and ongoing reflection during those meetings, during those coaching one-on-one meetings.

The next element is incentives. So, goals are incentivized with either cash or non-cash incentives. So when setting goals, Coaches tie incentives to the completion of either the goal or completion of action steps that are leading to that goal and incentives really try to develop a positive sense of self-motivating. It tends to build

momentum in what can oftentimes be a really long process in a journey to reach that future goal of economic self-sufficiency, these very long term goals.

Then lastly is coaching, and although this is the last element that we have listed here, it really is the foundation for all of our interactions and all of our relationships with the people that we serve using a Mobility Mentoring model. Coaching is the Mobility Mentoring, within this Mobility Mentoring model is, I would say, distinct from some other forms of coaching that you might have heard of like financial coaching or life coaching. I would say there's maybe three ways that it's particularly distinct.

The first is that it operates within the Mobility Mentoring platform and utilizes the Bridge that Agnes will show you in a few slides. The second is that it's not focused in one domain of people's lives. Like, financial coaching might just focus on the financial aspect of someone's life. Rather, it pays attention to all of the interplay between all the different domains of life like well-being and education and family stability and finance and career. Then finally, as you may have gathered, it's intentionally EF informed. EF, meaning Executive Functioning-informed. It really incorporates the understanding of the ways in which the stressors of poverty impact our thinking and behavior. So all of those four elements that you see on the screen, they work together to create a Mobility Mentoring-informed model. So I'm going to turn it back over now to Agnes who can continue with her presentation. Thanks, everyone.

**AGNES:** Thank you, Jennifer. And as you can see here, the IIEESS conference that Jennifer spoke of, we were hard at work here and that's how we were introduced to the D.C. coaching team. It's been a wonderful journey and we're working on those two goals there that Jennifer mentioned. Incorporating the 2Gen approach in deepening and strengthening that coaching strategy. And we're enjoying learning these things. It was just great to see even with the 2Gen approach how much TMC is already working towards that thing. We just really enjoy learning it more and strengthening that.

So, just a little more Targeted Mobility Coaching as we go to the next slide. So Targeted Mobility Coaching was developed intentionally as we said by previous Program Manager Tamatha Davis. It was intentionally developed to target services and resources and educational programs for our families. The approach, it's a family-centered strengths-based approach; it's solution-focused and it's infused with family development and mobility coaching, and the hope is that we can empower customers to change their situation by building skills and behaviors through peer mentorship and through the individualized coaching. So that is the goal, the aim of the mission of Targeted Mobility Coaching. At the beginning of the presentation I believe an attachment was sent to you about Targeted Intake Forms and as we said, we start this model with the customer self-identifying what's important to them. So you can view that form as you will. It just speaks to their career pathways, their barriers, what's important to them.

Along this journey developing the coaching, we had to get the staff buy-in. So here I'm going to talk about this slide a little bit and then Ms. Brenda Hinds, one of the Coaches, and Ms. Sara Tekle, is going to talk to us about staff buy-in as well. So we allowed the staff to be a part of the planning process. We used their skill and expertise to identify what areas they're strong in. Then we talked to them and let them see and understand how the coaching process would be easier as we enhance case management. So again Ms. Hinds will talk about how coaching is different now than it was in the past. And Ms. Tekle's gonna talk about the benefits of coaching and how it is good that the customer's with one person doing their whole TANF history. Ms. Hinds?

**BRENDA HINDS:** Hi everyone, I am Brenda Hinds. I have been a Case Manager, Vocational Development Specialist with the Department of Human Services here in Washington D.C. since November 2013. As a result I have been through the case management model and now the Targeted Mobility Coaching model.

I want to say that although case management is about the individual... it does not, although not intentional, it is much more about the case load rather than the individual person. We as Case Managers, we are pressured or were pressured at the time to ensure that customers became engaged in an activity so that their benefit may not be decreased or terminated. As a result, I felt that quality of service was compromised. Although we worked with customers and we heard about their individual goals and aspirations at times, at times it was sidetracked because we were trying to ensure that they kept their benefits. To us, case management implied

that we as the professionals guided the customer. We thought we met them where they were. However, as we looked back, it was more like guiding them through an activity.

"This is what we have available because you said you wanted to be a Home Health Aide," for example. "So this is what we have available." And even though we heard from them, you know, their barriers and other stressors they may have, not wanting to ignore it but we were really pushing them to do the screening. Case management seemed so standardized. We got the customers to do stuff. Some of them moved through it quickly, and some of them more slowly. For those who moved through it quickly, that was a success. But what about those who did not move through as quickly as we wanted them to be? A lot of times they fell on the wayside. Disabilities, other stressors... all came in the way. And our hands were tied at times. It seemed to us that we would just diagnose them. It was so structured that there was diagnosis and treatment and although we did extensive intake application processes where we did assessments and all that, we heard of the customers' work histories, their disabilities and everything else, we diagnosed and we pushed them, for want of a better word, into an activity. To some of us, that was painful. When coaching came, that helped. I will now give you Sara Tekle to talk about social work.

**SARA TEKLE:** Good afternoon, everyone. My name is Sara Tekle. I am also part of the Targeted Mobility Coaching team. I actually came in shortly after the implementation of this new model, so I'll be speaking mostly about what the TMC model looks like now. The way it's designed now is a customer will stay with one Coach for the extent of their TANF life. Our goal is really to provide a more customized plan for that customer based on the goals that they've self-identified so that the end result is when the customer exits a program they do so with a clear career path and it's one that they've come up with themselves and that they've already taken steps towards. Of course our hope is that they exit over income as well.

I think what we hear often as Coaches when a customer comes to us during our initial meeting is: "What do you want me to do?" or "What do I have to do?" There's this notion that recipients of public welfare don't have goals or that they're cavalier about their futures. But I think what's really happened is that they've become disillusioned by some of our assistance and the ways that we interpret case management. As Brenda Hinds spoke a lot about that, where the Case Manager really dictates what's best for them and their families. So by the time they come to us that attitude of "What do you want me to do?" or "What do I have to do to keep my benefit?" it's just there. So with coaching one of the first things that we have to do is change that conversation to "what do you want to do, what are your goals and what are your family's goals and how can I assist you in achieving those goals?" So the idea is really that we're trying to shift the power differential and take more of the supportive strengths-based approach.

With the TMC model, we use a number of different clinical tools to try to help create these plans and incite that motivation within our customers. Some motivational interviewing is huge; asking open-ended probing questions to try to elicit changed talk and create a self-awareness for our customers. Using a solution-focused approach to help our customers work through their challenges which gives them, gives the customer the satisfaction of solving their own challenges rather than us giving them solutions to their problems. I think the idea is to start doing this at that first meeting so that you get them to come back. Because just honestly there really are a million other things that our customers can be doing especially with their sanction level being so low in the district. It's only 6%, as Ms. Vincent mentioned earlier. It's not motivation enough with those punitive things. So the idea is to make the relationship one where they feel better toward their time. And I think this coaching model and these techniques that we have been using have really been effective in this way because we have a good amount of customers in TMC across the board who were actually entitled to exemptions who are choosing to participate on a voluntary basis, and I think that really speaks levels.

I can speak to my case load specifically. Almost 40% of my active customers, when they came in; so in our first meeting, they qualified for a federal exemption, whether they were in the third trimester of pregnancy or they had a child under one, but they chose to participate on a voluntary basis. I would attribute a lot of that to this new coaching model where the customer's in control of their plan and these techniques that we're using to try to keep them engaged.

I also wanted to talk a little bit about how this coaching model is really, has a lot of mutually beneficial aspects. So not only does the customer get a lot out of it but the Coaches do as well; you're building that rapport, you have more personal relationships with your customers and the families to include the children with the new 2Gen model. You'd have the elimination of customers being shuffled around to various centers which really limits that continuity for them. And it helps us with discussing their progress and helping them move through goal progression and helps us build and continue that momentum. The customers develop greater self-awareness and enhanced economy which is beneficial for both parties because the customer's really charged with taking action towards their desired result. And then we kind of get away from the Coaches having that toxic and stressful boss image where we become more of a guide or a resource rather than somebody to be feared.

**AGNES:** Thank you, Brenda and Sara. So with staff buy-in, I believe just having the staff in the beginning of the coaching model development and let them see how we've enhanced case management, I believe it really helps even with accepting this coaching model.

So if we move to the next slide, we're going to talk about TMC's model key principles which were informed by EMPATH. I'm just going to mention them briefly. We have individualization, where we see that there is no one size fits all to the path to economic independence. It's just not one cookie cutter way. So for DHS we term that as individualized guiding to help this customer move to the next level in their lives. We need to have individualized guiding wisdom and let them see their worth and the assets they bring to the table. We also, the next principle is horizontality which here at DHS we call that teaming. So here the path to economic independence cannot be found in one health or human service silo. Effective servicing must bridge the silos so we try to bring every vendor or every person or organization attached to that customer's TANF history or life to the table so we can talk about with them their development, their career development.

The third principle is time, and for us, time is coaching. That's the model, that's what we want to do; we want to Coach the customer. And lastly, it's networking, and networking... no one can get to economic independence alone. With networking, we try to help the families develop healthy support systems, and that's where our ECO mapping comes in. So that's what we use this principle for; to network with a family who they have identified as who they want in their support systems and we help them to strengthen those areas.

So moving right along, as you can see, TMC... we have a lot of targeted moving parts. You see we have the family receiving TANF right there in the middle, and around the family we try to provide or infuse these areas of asset building, assessments, which we will just talk briefly about later on that slide on assessments that we use, barrier remediation, just a number of moving parts. So we have that family in the center to keep it person-centered. Here is just a snapshot of that implementation model. We're going to talk about it a little more and do a deeper dive into each of these areas. Of course we have the initial outreach, we have our intake and assessment, goal setting, mobility coaching and of course outcomes.

So the first 30 days we try to guide the customers this way, but based on where they are, because we meet them where they are. From week to week is how we determine what the next week will look like. So we start with our customer pre-screening and the customer initial outreach which is the telephone calls, the mailings, the community visits, some prefer texts. So meeting them where they are. Our second week is intake, and with intake; we have them come, once we get them engaged, we do all our assessments and our forms, and again based on where the customer is and how far they can go at that time.

In our third week we do our assessment. The fourth week is our detailed individual responsibility plan with our goal setting. In week four we continue their mobility coaching. If we're going to meet them in the office, at the library, in the community, wherever they need us to meet them, we continue that. And we constantly monitor our outcomes. So within this we just didn't want to lose focus of how we must build relationships.

So after this slide we will have another polling question, our polling question number two. But I just want to remind us, and I know all of us pretty much know this, some of the things it takes to engage a customer. As I said, we've got to meet them where they are. We've got to come from a strengths-based and solutions-based approach because every customer comes to the table with assets, they're resilient. We also remind our

customers you're taking care of a family of maybe five children. You're getting them to school, you're monitoring their day. And we've got to conceptualize the resistance in a manner that empowers them. So there may be some resistance, but let's roll with that resistance and turn it around and help the customer see how they can be empowered.

Our next polling question before we go to the next slide is: what are some best practices to reach hard to engage customers that you have used? So we're going to pause here for a moment and give you time to answer.

Okay, thank you for doing that. The next slide is talking about we've engaged the customer. And now what does it take to keep the customer? So we just want to be mindful of our attitude, no judgment, authentic, and we're the customer's biggest cheerleader. Our approach: show the customer their progress. So for us we use the MOVES database and we let them see their ECO mapping. We have a colorful career ladder that they put their steps on, and we just go the extra mile. Be transparent, don't make big promises that you can't keep. Model the way for linking services.

So again here we are at a glance, that's Targeted Case Management or coaching at a glance, what we do in our pre-screening and week one through four of the month. We're going to talk here a little bit about our assessments. Before, Sara and Ms. Hinds talked about the assessment that we use briefly. We're going to have a polling question after this. But assessments we found are important and it's an essential part of the family doing the coaching. It helps us to make decisions with the customers. It helps us to help them identify their goals, their family development. So we use our assessments in a number of ways. To identify needs, strengths, resources needed, to make linkages, and just to incorporate information to help the customer's progress through the coaching tenure.

Next our polling question is: how often are customer assessments completed in your organization? If you would just take a minute and choose which one works with your organization. That would be helpful. So we're going to pause for a moment while you do that.

Thank you very much. So moving right along. As we said, we're going to talk about assessments. And Ms. Tekle and Ms. Hinds are going to briefly talk about the assessment that we use. Ms. Hinds will talk about our TANF comprehensive assessment with the TCA and the ECASAS. And Ms. Tekle will talk about the career assessment and the financial assessment and I will wrap up with our Bridge to Success assessment and our MOVES database. So Ms. Hinds, you would like to start.

**BRENDA:** Sounds good, Agnes. The TANF comprehensive assessment or TCA is the tool developed by the United States Department of Health and Human Services, Administration for Children and Families. And it's tailored locally to meet the needs and partnerships of DHS's sister agencies and core service providers. Now this tool creates a holistic strengths-based profile of the customers' skills, abilities, and challenges to employment, after employment until their goals. The assessment also takes into account the customer's education, their educational level, their work experience level and their personal health and other barriers to employment. The output of the assessment will determine the services that are most appropriate for the customer given his or her present circumstances. This assessment specifically determines which of the four service quadrants on the TANF unit referral services rubric model that is used here in D.C. that all customers would be referred to, whether it would be work readiness, job placement, barrier remediation and financial support, or barrier remediation and work support.

I will move right on to the ECASAS. Because as part of the TC, DHS administers the ECASAS employability competency system appraisal for customers identified through the TCA. Now the ECASAS gauges the customer's reading comprehension and math level. DHS enters the customer's scores, skill scores, that is, for math and reading in the system and the assigned provider can now access the customer's scores in cache. The provider interprets the ECASAS scores so that the customer is now fully in an appropriate education program or instructional level. Now because of the ECASAS testing a number of our customers can access even vocational education in the district. Because some of them are shy to go into, to visit an educational

institute but because they are doing the ECASAS testing and feeling empowered, there is a score, I did well. My score is this or that, I am now feeling better to apply for a training program.

**SARA:** Thank you, Ms. Hinds. So one of the other assessments that we use for our customers who may be more ambivalent about what they wanna do career-wise, we have a career assessment. It's an online assessment called My Next Move. The assessment's really user friendly. It presents a series of statements on a sliding scale that the customer will answer solely based on their interests. So it's a scale from strongly dislike to strongly like. When they complete the assessment, the results will populate that say whether that customer is more enterprising or whether they would enjoy a more conventional career. Then based on what areas they score highest in, you could see what careers are compatible and then that creates a discussion. For instance, somebody might take the assessment, the assessment man indicate that that person enjoys sciences and working with people. So that customer may say, well, I've always thought about becoming a registered nurse. So that creates discussion, then you would use My Next Move or the career assessment to look up different careers and it gives you career specs. So it'll give you the projected growth for being an RN, or the average salary for registered nurses, what skills you might have to possess to be successful in that field. And so then there's further dialogue that's created by looking at those things. The customer will decide whether they think that that's something that they want to consider pursuing or if they would like to look into other things that might match their interests, some other things that may have populated based off the results of their assessment.

What we also do is we have an accompanying career pathway. It's something that we do on paper. It's almost like a person climbing a staircase. So there's these different levels where a customer is able to map out the steps to get to their final destination, which is their career goal. So that's something that we do with our customers and they're able, it's something tangible that they're able to take away and look at. It almost kind of serves the same purpose as a vision board. Because they're able to refer back to that and look at the steps that they need to make and some of the steps that they may have already taken to try to achieve that career goal.

We also do a financial assessment. So we have a tool called Your Money, Your Goals which we get from the Consumer Financial Protection Bureau. It's really great because it's more than just an assessment, it's actually an entire toolkit and it's really comprehensive. It allows you to gauge where the customer is and then cater the things that you are going to work on based on the customer needs and wants. So it has everything from an income and spending tracker to information on how to dispute something on your credit report, to eliminating debt and building credit. I think the building credit part is huge because when a lot of folks, our customers, come to us and they do that intake assessment that's usually something that they say that they want to work on, especially because a lot of our customers struggle with housing instabilities and we know that credit is a huge thing when it comes to getting a lease or even if home ownership is one of their long-term goals. So those are all things that we could work on using the Your Money, Your Goals toolkit.

And honestly it's probably one of my favorite things to do as a Coach because the satisfaction that you see when the customers get to begin to feel that financial empowerment is really, it's just beyond words. Because financial literacy isn't something that's talked a lot with, amongst our customers. And so they're kind of getting a first look at it and they really are excited about it. So when a customer comes back to share some of their successes, you see it in their face that they really do feel that empowerment. For example, I was working with a customer who, we pulled her credit and we saw that she had a lot of student loan debt and it was really affecting her credit score. So we used the tool kit to talk about debt consolidation. And when she came back to see me she couldn't wait to share the fact that she was able to talk to her loan providers and consolidate that debt and that was a huge achievement for her because she didn't know that she had the power to negotiate those things. It helps us to continue to build on that intrinsic motivation for our customers. It's a tool that we use on an ongoing basis, and as it fits the customers' needs.

**AGNES:** Thank you, Sara and Brenda. And to wrap up that Bridge to Success assessment which Jennifer mentioned earlier; the next slide, you will see that there. That's our Bridge to Success assessment. As you can see the last column, we did use it and we incorporated our Washington D.C. employment and career

management figures. And then the last assessment is our MOVES database. That's what we use to input the progress towards the customers' goals and their action steps.

Before we go to the next slide, our last polling question on how often are customer assessments completed, there's a part two to that question. If you would take a moment and just talk about how has this pace of completed assessments benefited the customer for you? And we'll appreciate that.

So as we move on to the next slide, we talked about the 2Gen approach; the two-generational approach. And we talked about that earlier but here at DHS, what we want to do is to take an approach that looks at the whole family. In the past TANF primarily dealt with the head of the household or the parent. But now we want to address the whole family, and the parents' and the children's needs. So this is a holistic shift for us to make sure we infuse the two-generation approach in our family-centric service delivery.

As we move on we have that final polling question. Our final polling question is: "Have you incorporated or plan to incorporate the 2Gen approach in your coaching practices?" If yes, explain how. So if you would take a moment to answer that question, that would be great.

Thank you very much for that. So as we go to the next slide we just wanted to show how TMC has already started infusing the 2Gen approach in our practices. We, for example, for social capital where we address assessments and learn about the customer's family dynamics, we use the ECO mapping and we use the TCA. So some of the things we are already doing. But we want to amp this process in the coaching learning community with IIEESS and EMPATH has helped us to expand it even more.

So now we want to talk a little bit about how we keep the clinical component integrated in our coaching model. We do a lot of training here. We want it to be a continuous cycle, so we use trainings like webinars from EMPATH with executive functioning. We also do some internal training on motivational interviewing, recovery, setting boundaries, customer care. And also we strategically approach our supervision. For our supervision practices, we have one-on-one meetings with the coaching. We also do shadowing, and one of the forms that was given to you at the beginning of the presentation is the form that we use for shadowing. We're going to enhance it a little bit from what we learned over the learning community we're in. We shadow the Coaches, we do case reviews, which is another document that was sent to you, was our case review form as well. And just to mention about the case review form, one thing that we find helpful when we do case reviews is the customers, the Coaches, they list the coaching strategies that they use. So we do find that really helpful. As you can see on the screen, that's a picture of us as we are going into our case reviews, but what we do is not only identify the challenges and the barriers, but we ask the Coaches to talk about the coaching techniques they used. If it was an education session, did you use motivational interviewing, role-playing, what did you use? So our case management, or our case reviews, are really a big part of what we do here with the coaching.

Moving right along, we wanted to let you know that we do incentivize small steps. DHS already has in place a monetary incentivized program. But that's for the customers that meet their TANF required hours. What we've found in coaching, the customers need that push or that motivation even before they get to the point where they can get those monetary stipends. So for example if a customer starts GED school, they complete their orientation and complete three months, then they can get a school starter bag. So it's a book bag which includes a tablet, highlighter, Post-it notes, a USB port, so we make a big deal to celebrate them about staying on the course of their goals. So we do non-monetary incentivizes in the coaching model.

So to wrap it up, before we bring a customer in, from start to finish, this is what we hope it would look like in that coaching model. The Coach is assigned, we address the barrier mediation which is with our Bridges team, if the customer's not able to move forward with training or employment they're transferred to our Bridges team where they help them through their barriers, hopefully get them through career pathways, job development, employment, and exit TANF over income.

So, as we move to our next slide we're going to prepare to bring our customer in. These are some of the things that we measure as outcomes, the caseload size, the number of customers pending sanctions because we

really want to work with them and hopefully not get to the sanction part, the number of customers sanctioned, the number of customers engaged in training and employment, the number of customers meeting their TANF required hours, and the customers that are moving along with their goals in our MOVES database.

So, the program goals that we worked on for 2018; we wanted to increase our outreach by 20%. We wanted to engage our customers. We want that to be by 20%. We wanted to acknowledge small steps by incentives. So the lessons that we learned is that we need to take advantage of leveraging more training from other District agencies and federal technical programs. Support our staff that utilize the coaching practice, we really want to support them and give them what they need. Be strategic in how we expand this and which target populations we should expand it to. And remember that the coaching approach takes a long time but it has a stronger lasting outcome. What we're going to do now, we're going to have our customer come in. But before we do that, Ms. Tekle's going to give you some background on the customer and Ms. Tekle will lead her in the questions that you see on your screen on the next slide. Sara?

**SARA:** Thank you, Ms. Venson. So just to give a little bit of background about the customer that you're going to hear from. Her name is Ms. Tiana White and she has been receiving TANF for almost 10 years. She has almost consistently been in the "failure to participate" pit for the past 10 years. She is currently eight months pregnant so she is entitled to an exemption from the program. But she came in choosing to participate in this program which I think is something that's worth mentioning. She is now actively participating. So she's making her weekly required hours, or what her weekly required hours would be if she weren't required to participate. She is in GED courses, she's receiving behavioral health services for a lot of her previous traumas and some of her anger management issues. She's made a lot of progress, so we've prepared some questions for her based on her TANF experiences and I think we're going to bring her in now to have her answer those.

Hi, Ms. White. Thank you so much for being here. I know that we discussed a little bit previously that we had a few different states on the line who are interested in hearing some of the coaching techniques that we've been using in the D.C. government DHS, so we thought it would be nice to have a customer to come in and give a little bit of their input about their experience in the program. So thanks again for being here and unless there's something you wanna say right now let's go ahead and get started. I'll jump into the first question. Is that okay?

**TIANA WHITE:** Yes.

**SARA:** Okay, great. So the first question is how has the coaching process helped you engage or participate with the TANF program?

**TIANA:** It helped me a lot because my Coach reaches out to me by sending me emails, communicating, engaging, I'm sorry.

**SARA:** That's fine.

**TIANA:** I got all messed up. Okay... helps me out by sending emails, communicating with me, reaching out to me the day before I come here just to let me know what's going on, writing things to help me learn how to put notes into my calendar... into my calendar so I can know what days to come, what times to come, and make sure I'm on time.

**SARA:** Thank you. Has this experience been different than some of your past TANF experiences? And if so, could you tell us a little bit about how?

**TIANA:** Yes, my experience has been different, way different. Because you've helped me with my resources by connecting me with the Department of Behavioral Health and the wellness center also therapy and also helping me, I keep saying it's not captured.

**SARA:** Okay, and you feel like those things have helped you?

**TIANA:** Yes.

**SARA:** Do you find that working with your Coach is worth your time? And if so how or why?

**TIANA:** Yes, I think it's worth my time because I know I was in need of things, a lot of things like work within myself, so you helped me accomplish a lot as far as like listening to me, coaching me on, letting me know when I was wrong and when I was right by it. Like when I came in and I was angry one day about a job and I put some things on my resume saying that I had worked longer than what I was, put an attitude and let me know, Ms. White, you can't do that.

You know you have to put right things on there so if they was to like call and verify it has to be right. So you helped me by doing a lot. Listening, like I said, and encouraging me and just being there and caring basically about everything.

**SARA:** What goal has the coaching process helped you accomplish?

**TIANA:** Getting my GED and putting me back in school. And basically helping me as far as my attitude and stuff that I really need help with like helping me recognize that I do really actually need to see a psychiatrist and a therapist in order for me to move on in life.

**SARA:** Okay, and what areas of improvement have you seen and would you like to see moving forward?

**TIANA:** What I've seen was my attitude got better. I'm more patient, I'm engaging with my Therapist and what I would like to see is me graduate my GED and go to school, go to U.D.C. for social working and graduate.

**SARA:** Okay, good. Thank you so much for sharing that, Ms. White.

**TIANA:** Thank you.

**AGNES:** We appreciate you coming. Thank you very much and congratulations on owning your life and moving forward.

**TIANA:** Thank you, I'm enjoying it. I'm enjoying every little bit.

**MEGAN:** So Ms. Tekle's going to take you back out and thank you again.

**TIANA:** You're welcome.

**BRENDA:** Thank you, Ms. White.

**TIANA:** You're welcome.

**AGNES:** So that ends the presentation with coaching for DHS. Thank you very much for the opportunity. Now we will move in question and answer period.

**MEGAN:** So just as a reminder to our attendees, if you have any questions you would like the presenters to address, please type them using the Q&A box that's located on the right-hand side of your screen and they'll get those answered. So we'll take a few minutes for Q&A before we wrap up today.

So we have our first question. It's from Azaliah. She says, "What was your biggest challenge in trying to implement coaching into your TANF program?"

**AGNES:** Okay, we didn't see it. So what was our biggest challenge in implementing coaching in our program?

**MEGAN:** Yes.

**AGNES:** I think the biggest challenge was just adjusting from the way that we used to do it before we enhanced case management by coaching, with coaching, 'cause the way we used to do it we sat here and we kind of just gave the customers a to-do list. But with coaching we actually let them lead the conversation and we do more community outreach and home visits. So I think the biggest adjustment was changing our mindset from not directing but doing more listening and allow the customers to list their goals and we help them to learn how to develop the necessary coping skills to go after their goals.

**MEGAN:** Okay, we have another question from Ruthie. She has asked “What is your caseload size for your Coaches, and did you have any challenges setting up a reasonable case load size?”

**AGNES:** That's a good question. So the case load size for our Coaches is we base it on active and inactive customers. So we could have a case load size of 25 or maybe even 30 but we also have inactive customers on that case load. So our case load, out of our case load of 25 or 30, may have active 10 or 15 customers. So the inactive case load that's administrative, reaching out and documenting, where the active case load of course is having them come in or meeting them in the community, doing the assessments and every three months updating their detailed IRP. And yes, for the second part of the question, it is sometimes difficult to align the case loads. Especially if the case load increases and the more active customers increases. So the supervisors, we try to stay on top of that so we can monitor it as to not overwhelm the Coaches.

**MEGAN:** How often would you say that you go over progress towards goals with your participants?

**AGNES:** I'll let one of the Coaches answer that. So the question is how often do we go over progress with our customers to ensure progress?

**BRENDA:** Okay, well, we do it every three months. A customer visits a Coach biweekly. We discuss progress, but as it pertains to determining whether the goal is abandoned or it needs to be revisited, we do that on a quarterly basis.

**MEGAN:** Thank you, Ms. Hinds.

**AGNES:** And like Ms. Hinds said, if our customers are more severe or having more challenges we meet them weekly. But otherwise every other weekend we visit the goals quarterly where we update the TANF comprehensive assessment in the MOVES database and any other assessment we need.

**MEGAN:** Okay, if we have any other questions now would be the time to submit those last-minute questions before we wrap up for today's presentation. So we'll give it just a few more seconds.

Oh, we do have one more question from Ruthie. She said, can you tell us more about how you are doing the 2Gen work?

**AGNES:** Okay so more about the 2Gen work. So as I mentioned earlier, I'm going to try to go back to that slide. We purposely tried to make sure that we're incorporating the five factors in the 2Gen and in what we do. For example for early childhood development, what we do, and that's one of the factors in the 2Gen component, DHS offers child care. We do early stages, so early stages actually come on site, that's through OSEE. And to help our families with small children to get the services that they need. We also do home visits and while we're in the home, we assess the whole family. For economic assets, as you heard Sara speak about, we do the Your Money, Your Goals booklets with the customers, teaching them how important it is to have a budget, understand how important it is to know where their money is going. So what we do with each area of the 2Gen approach, we try to make sure we get this status as we go over the Bridge to Success with the customers and make sure we're hitting those areas, and we not only do it for the head of the household or the TANF recipient, but for the whole family.

**MEGAN:** Great, thank you. It looks like we have another question from Sharon. She has asked “What roles did your executive leadership team play in creating a coaching environment?”

**AGNES:** That's a good question. In the beginning, as we mentioned, the Program Manager at that time, Tamatha Davis-Christian, she felt the need or had a vision to enhance our person-centered delivery model. We researched and we found coaching. So from the onset they've been on board and actually pushing us. So for an executive level management as we move forward with the process they work hard to get us what we need. Of course we still have to continue to tell them our needs to let them know where we are. They also, but have not received resistance from them, it's been embraced. It's been encouraged. We do our monthly reporting with them so they know exactly where we are. And that has made the process really easier by having executive management buy in and support and that is truthful.

**MEGAN:** Okay, it looks like that's all the questions that we have had submitted for today. So Agnes, I don't know if you have any closing words?

**AGNES:** No we do not, just that we enjoy the coaching model and we think it's a way that has really helped families to reach economic independence.

**MEGAN:** Great, well, thank you guys so much. I want to touch base just really quick on those files that we talked about being transferred at the beginning of the webinar. I don't know if everyone got the opportunity to download those, so I would like to take just a few moments before we close to transfer those files again. And to any attendees that would like to download these files, you will see a box pop up, a pop-up on your screen. All you would need to do is click on each individual file and then click the download button that's located at the top of that window. And then from there you can save off the file onto your computer or print it or whatever you'd like to do with it. So we'll take just a few moments and give you an opportunity to download these four files and then we will wrap this up.

Okay, we're going to go ahead and close that file transfer box here in just a few moments. It looks like we've got a few people just doing some last-minute downloads. Okay, all right. Well, thank you, Agnes and Jennifer and Sara and Brenda. And to Damon, he had to step off the call but he wanted me to let you guys know that he appreciates everyone participating. There will be a recording available in the coming weeks of this webinar but if you have any more, if you need more information or have any questions please don't hesitate to submit those to your Coach who can reach out to D.C.'s coaching team. So again, thank you all so much, we have appreciated you attending the presentation today. This webinar will be available shortly. Thank you.

**PRESENTERS IN UNISON:** Thank you.