PROJECT EARN MEETING FLOW CHART

10/24/05

Marketing and Recruitment

Screening and Random Assignment

-Screening Questions
-Consent Form
-BIF
-Random Assignment

First Meeting:

-First meeting outline
-Orientation Bank Book
-Advancement Goals/ Motivation worksheet
-IIAP-identify advancement & income improvement action steps
-Photocopy Right to Work docs.
-Check alternate contact info.
-Establish date to next appt.
-Review IIAP and topics for next appt.
-Give client copy of IIAP
-Give client incentive card

Prior to next meeting, call customer to remind them of the appointment

Second Meeting:

-Review progress on IIAP action steps
-Revisit message of advancement and income stabilization
-Income Calculator, Part 1
-If appropriate, begin applying for work supports, identify additional documentation required
-Income Stabilization Form
-Income Calculator, Part 2
-Update IIAP, outline next steps, relate to motivation
-Update alternate contact information
-Establish date for next appt.
-Discuss topics for next appt.
-Give client copy of IIAP

Prior to next meeting, call customer to remind them of appointment

Third Meeting:

-Review Progress on steps outlined in the IIAP
-Revisit message of advancement and income stabilization
-Finalize application for work supports, link the value of the benefit package to the customer's goal of increasing their income
-Update IIAP, outline the next steps, relate to motivation
-Establish date for next appt.
-Discuss what will happen at next appt.