Coachee decides to end match/complete program: Client Post-Survey, Coach and Program Evaluation, Exit Interview with VISTAs for a Great Story

Note: You will have dropouts.

Coaching Sessions for 6 months with VISTA check-ins periodically

Match Introduction Call with Coach, Coachee and VISTAs

Note: Make sure Client Pre-Survey is submitted

Send Client Pre-Survey and inform them of next steps:

If no coaches available, let them know they are on a wait list and when the next training is/when to expect to be matched

If coaches available, begin matching process

Matching: Choose best coach for coachee, confirm with coach and send email introduction

Can refer to other programs: tax prep, *Earn*Benefits, Guidewell Financial Solutions, etc.

Fills out coachee intake form at Meet and Greet

Talks with other attendees

VISTA contacts Coachee within one week of Meet and Greet to review intake and answer questions.

Reject

Attends Meet and Greet

Not Interested

Interested

Can refer to other programs: tax prep, *Earn*Benefits, Guidewell Financial Solutions, etc.

Accept

Contacts VISTAs to RSVP to the next monthly Meet and Greet

Note: Meet and Greets are required before being enrolled in coaching program

Initial Interest: Learns about Baltimore CASH through workshop, outreach event, partner referral, website, etc.