**Recruitment**

1. Initial interest from volunteer website, outreach event, partner referral, current coach referral, website, etc.
2. Contacts VISTA to RSVP to next monthly Meet and Greet
3. VISTA sends group reminder emails or individual phone calls within week of Meet and Greet
4. Attends Meet and Greet
   1. Note: Meet and Greets are required before enrolling in coaching program
5. Not interested: Can refer to other volunteer opportunities: tax prep, financial workshops, MPD, etc.
6. Interested: Fills out coach intake form at Meet and Greet
7. VISTA contacts Coach within one week of Meet and Greet to review intake form and answer questions (10 – 15 minute phone call)
   1. Make aware a background check/screening will be completed after training
   2. Rejected: Can refer to other volunteer opportunities: tax prep, financial workshops, MPD, etc.
   3. Accepted: Send next training data registration link and inform them of next steps
8. Attend CASH Coach Training

**Matching**

1. After training, perform background check/screening
   1. Rejected: VISTAs provide explanation for rejection
   2. Accepted: Volunteer proceeds
2. 30-Minute Practice Coaching Session with VISTAs within two weeks of training to give feedback
3. Use Matching Tool document to find best coach/coachee pairs based on
   1. Length both are willing to travel
   2. Day/time availability for sessions
   3. Gender preferences
   4. Use your own best judgement for personalities that don’t clash
   5. Coach strengths matched up with the topics/goals coachee chose on intake form
4. Enter Match in Salesforce
5. Introduce match via email and schedule Match Introduction Call

**Engagement**

1. Contact both coach and coachee after first session to check-in
2. Send monthly coach newsletter
3. Schedule monthly coach calls
4. Check-in at least monthly for trackers, other updates and to troubleshoot if need be.
5. If match is going well: invite to a Meet and Greet to tell their story

**Exiting**

1. Coachee decides to end match/complete program
2. Conduct exit interview to add to coachee’s story
3. Check with coach about another coachee and begin Matching process over again