

Coaching Training Snapshot

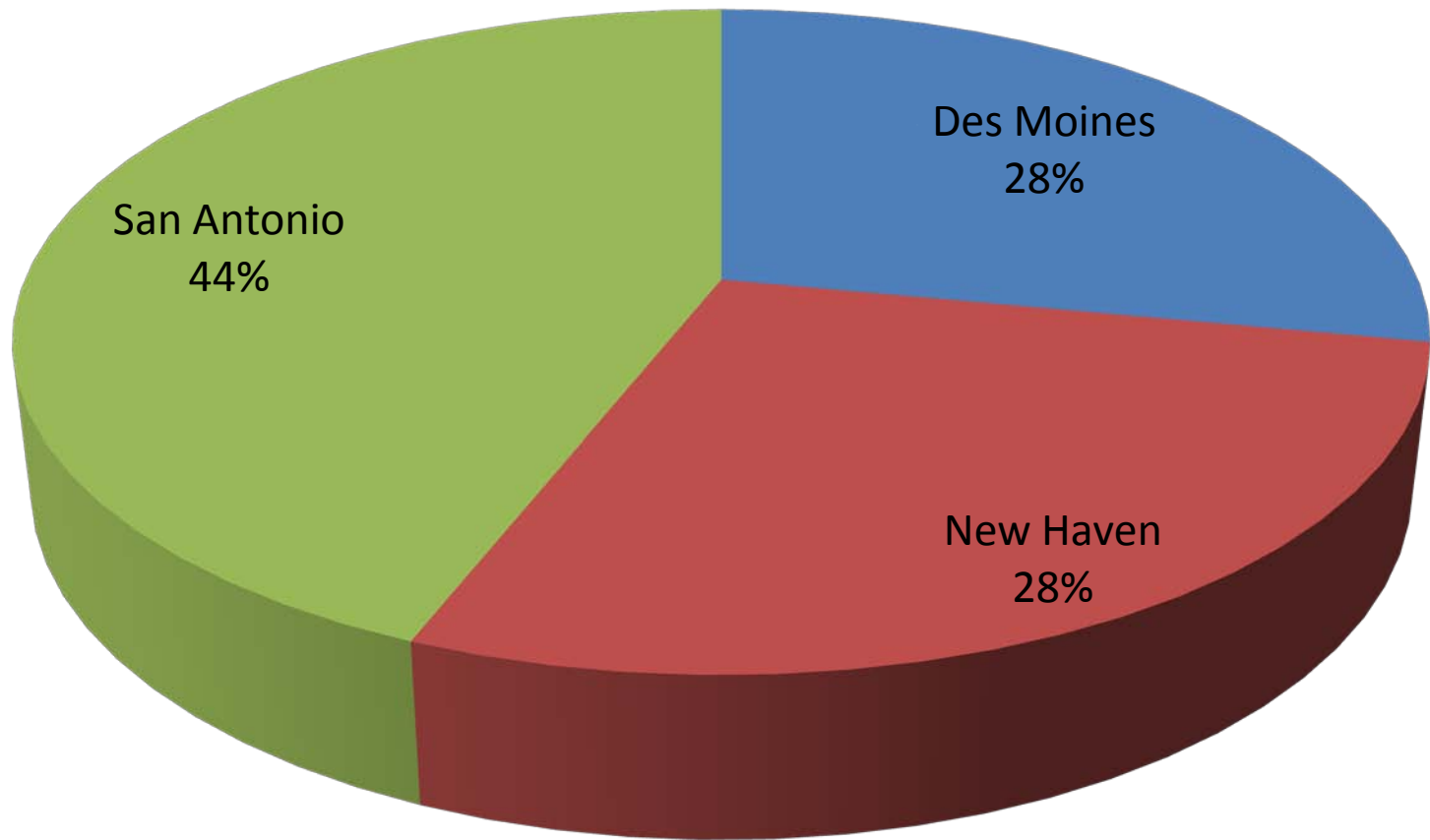
Bank of America & Annie E. Casey Foundation Meeting
April 26, 2010



CNM Trainings

- Trainings conducted in 2009
- Follow-up survey administered in February 2010
- Pre- training paper survey completed at each site
- Web-based post-training survey
 - 25 of the 27 clients who completed the post-training survey could be matched to pre-training survey
- Separate survey of training in Delaware – timing & context differences
- All findings still preliminary

Locations of CNM-Led Training



Source: CNM Coach Training Survey

Overview of Participants

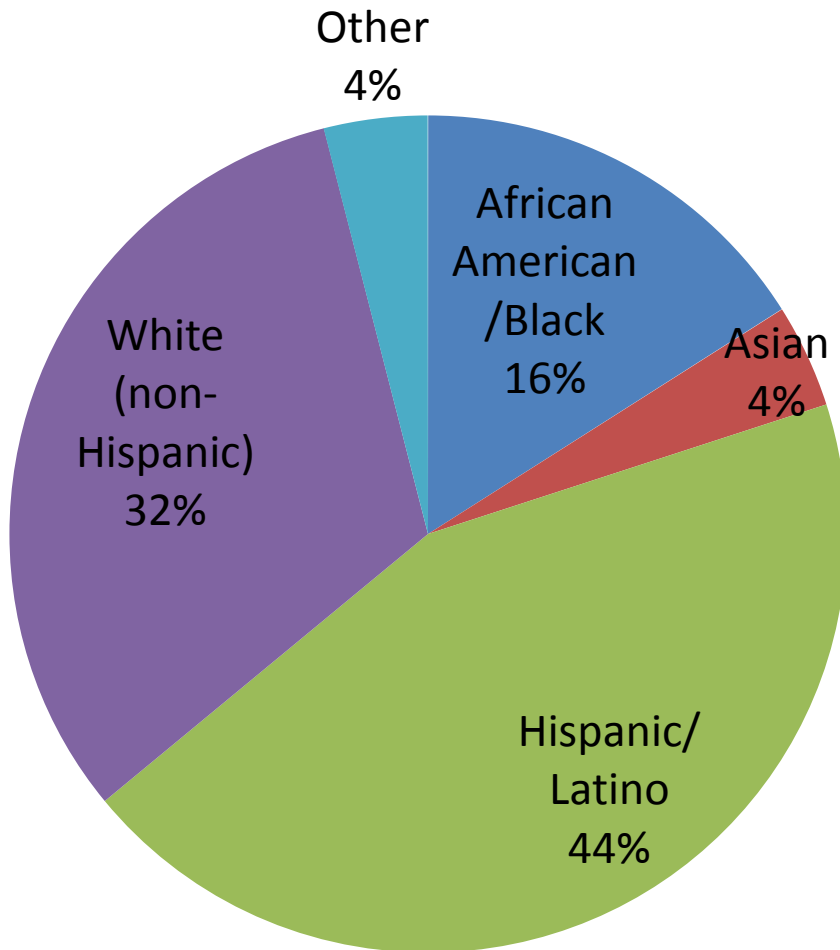
What is your role?

•Program Manager	8
•Client counselor	7
•Administrator	1
•Funder	1
•Other, please specify	8
•Community Researcher	1
•Community Services Specialist	1
•Community Services Supervisor	1
•Coordinator-Resident	1
•Resource Navigator	2
•Trainer	1
•Supervisor	1

How long have you been in your field or profession?

•0-1 year	3
•2-3 years	3
•4-7 years	2
•8-12 years	5
•13 years or more	12

Race & Education

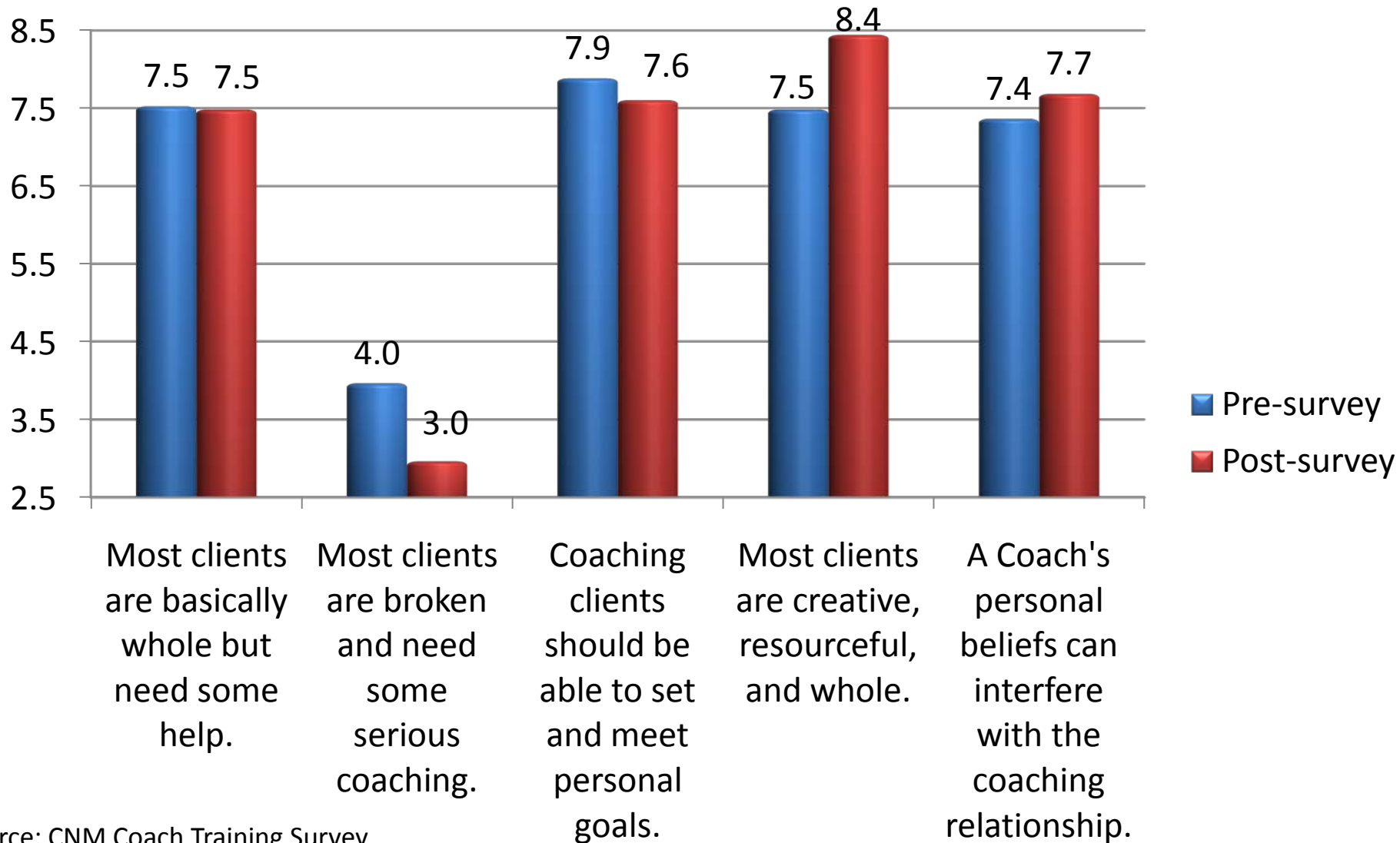


What credentials do you hold?
(check all that apply)

- BA/BS 14
- MS/MA 6
- MSW 2
- PhD 1
- MPA/MPP 1
- Other 7

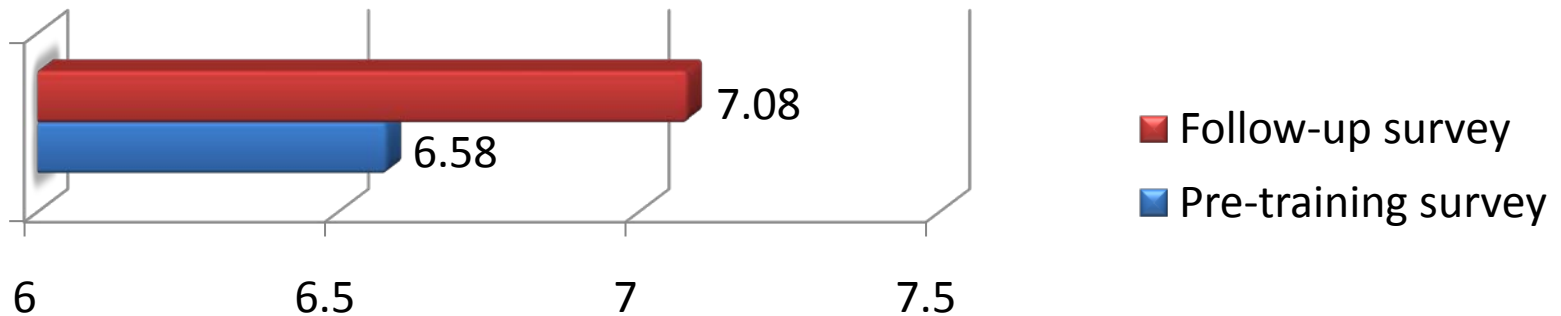
Modest Effects on Attitudes

How much do you agree with the following...?
(1=completely disagree, 10=completely agree)

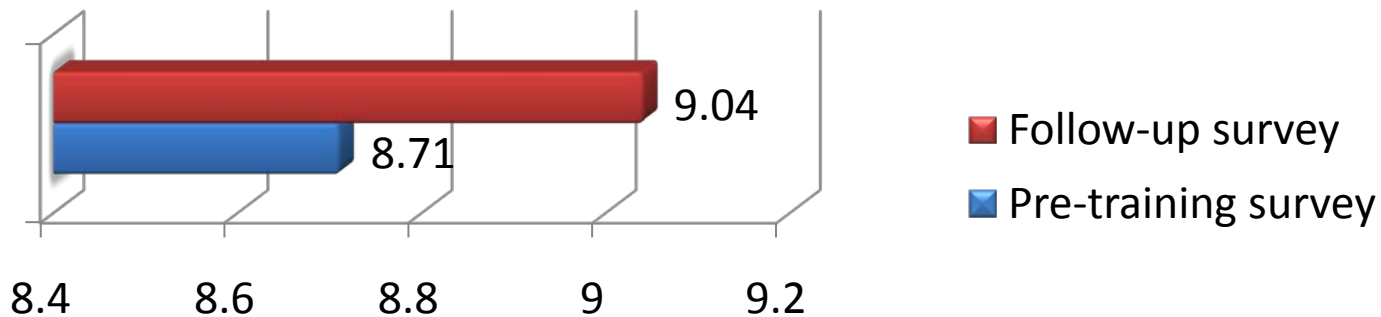


Few Personal Impacts...

How do you feel about your current financial condition?
(1=overwhelmed, 10=comfortable)

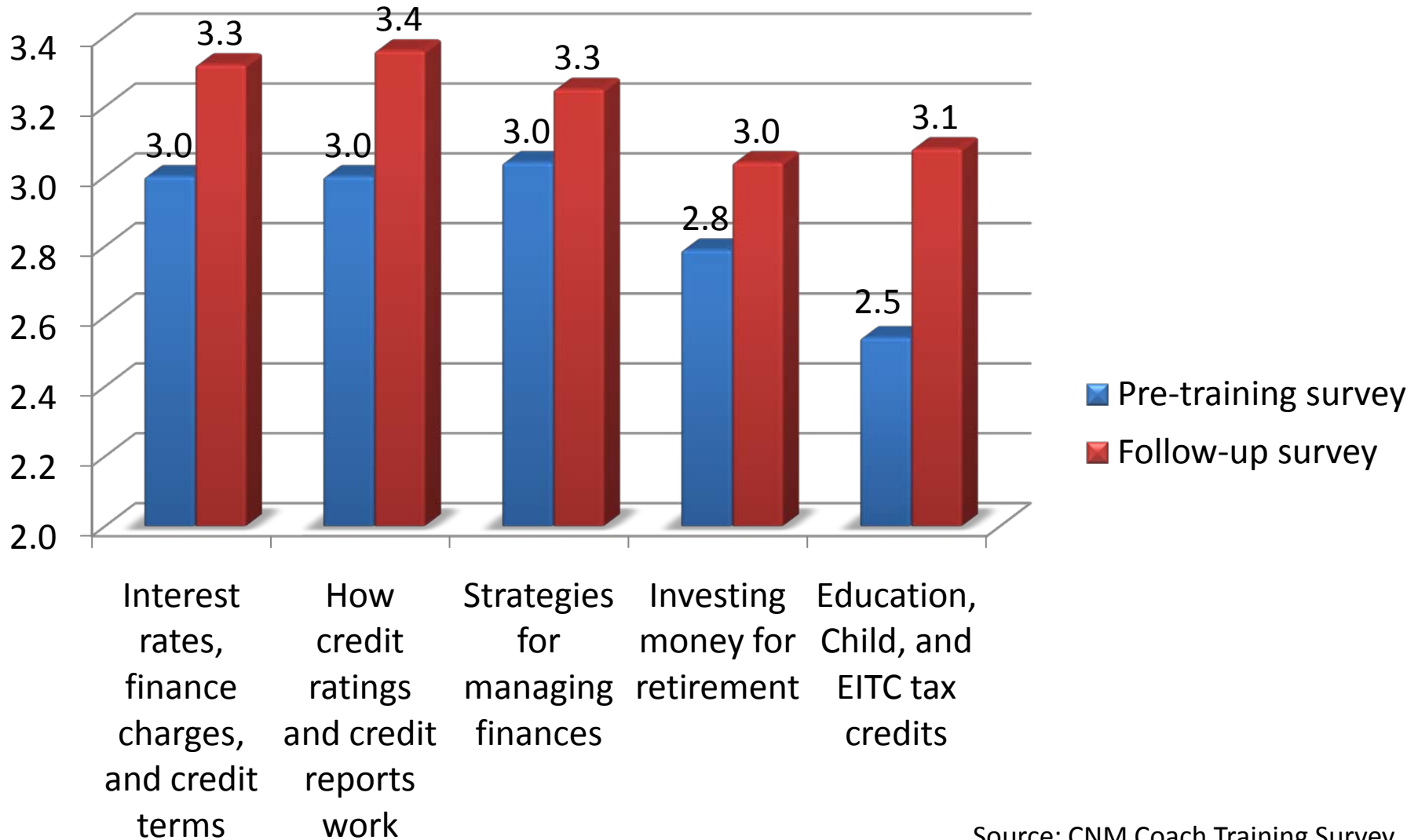


If you had a question about a financial problem how confident are you that you could find an answer? (1=not at all confident, 10=very confident)



Small Self-Reported Knowledge Gains

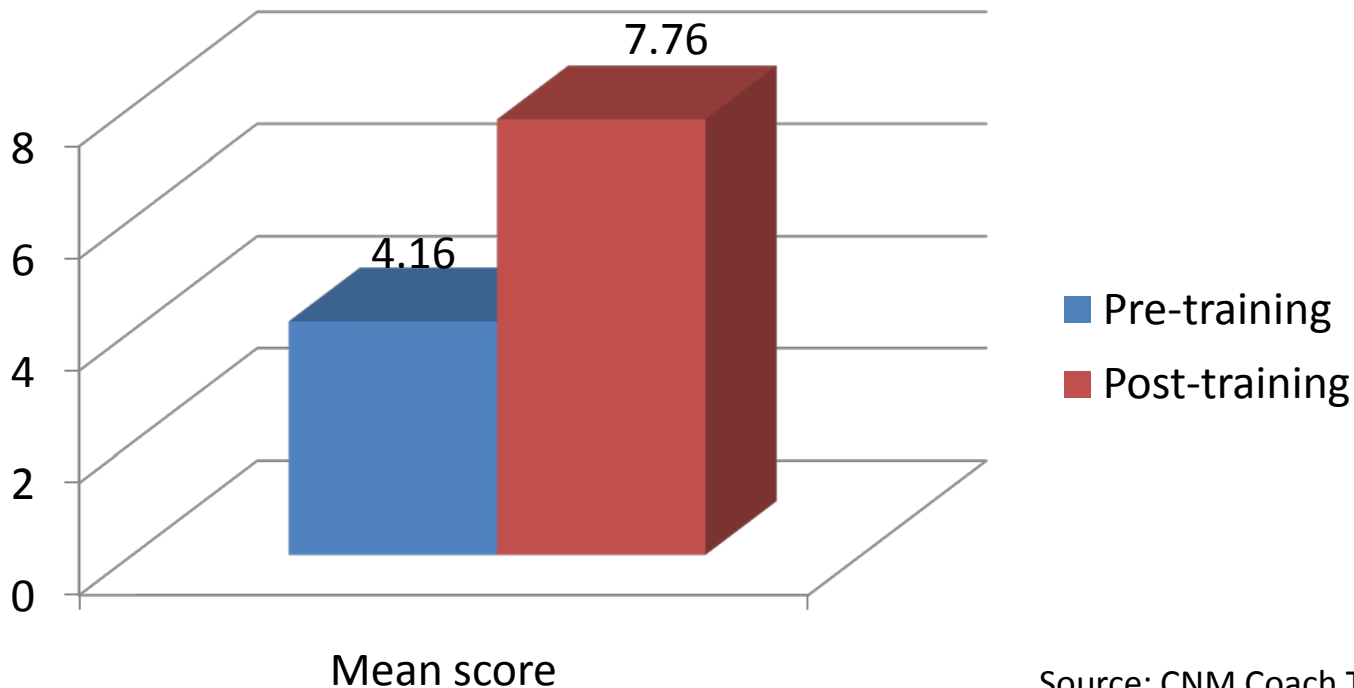
How much do you know about the following? (1=nothing, 4=a lot)



Significant Knowledge Score Increases

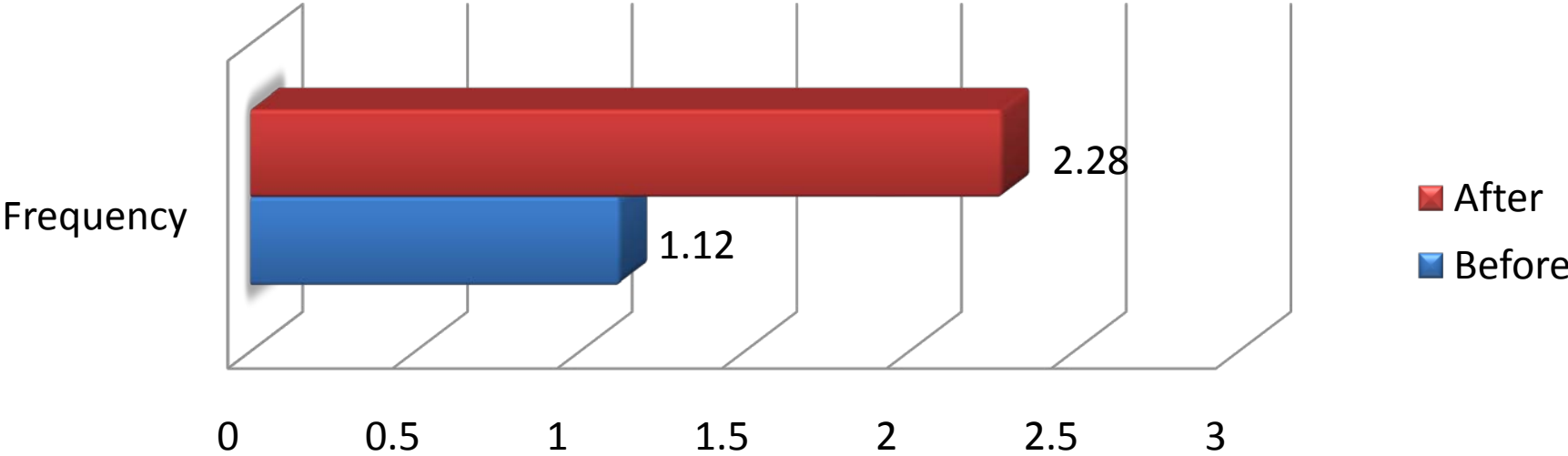
10-Question Pre-Post Test

- 37 participants completed pre-post knowledge tests
- Scores for 34 of the 37 participants increased
- Example questions:
 - What is a realistic, comfortable ratio for housing costs as a proportion of gross income?
 - Which of these is not an indicator for bankruptcy? (Excessive student loans)

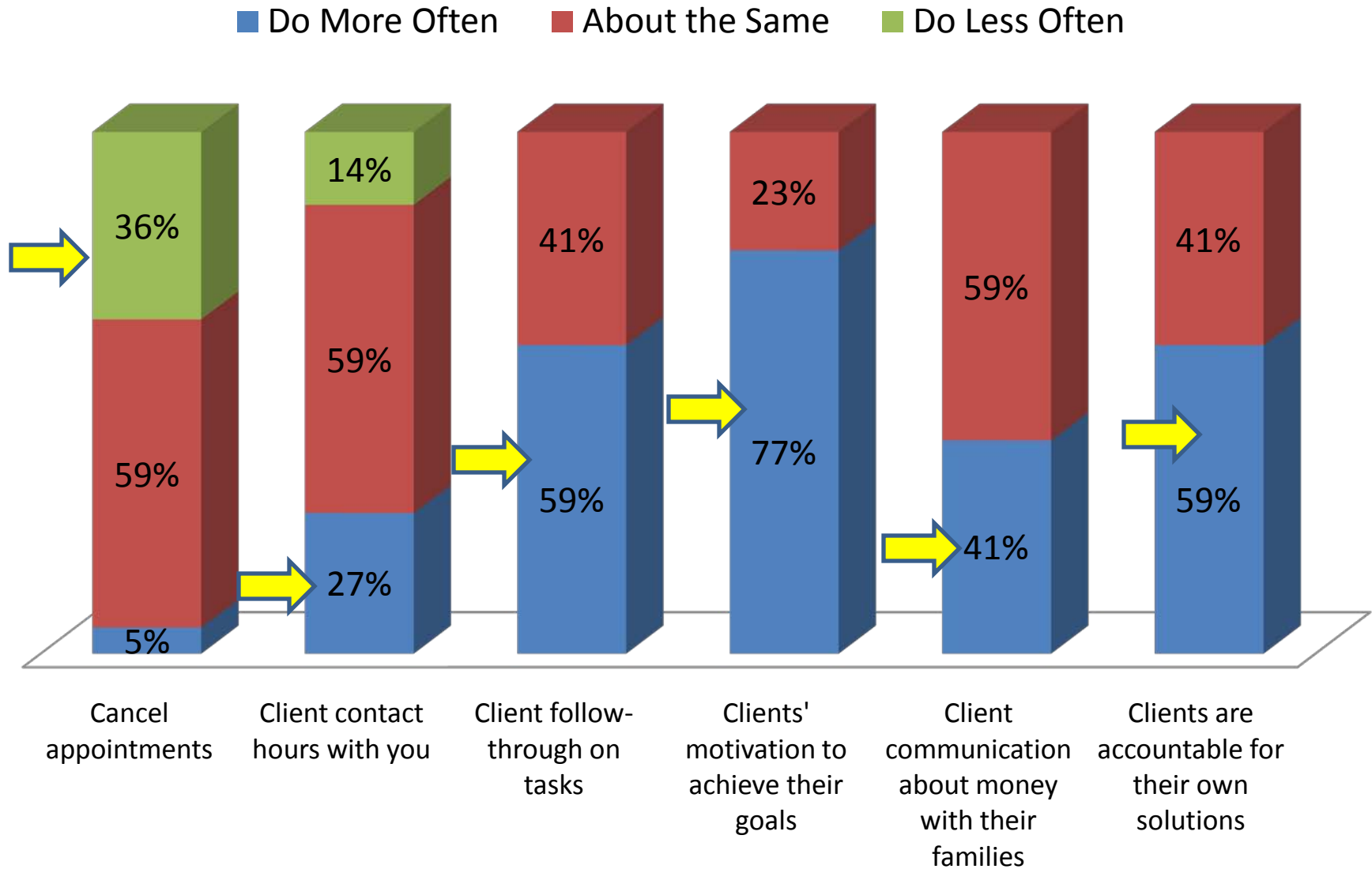


Retrospectively See Gain in Use of Coaching Techniques

How often did you use coaching methods in your work with clients on financial issues? (0=never, 3=most of the time)



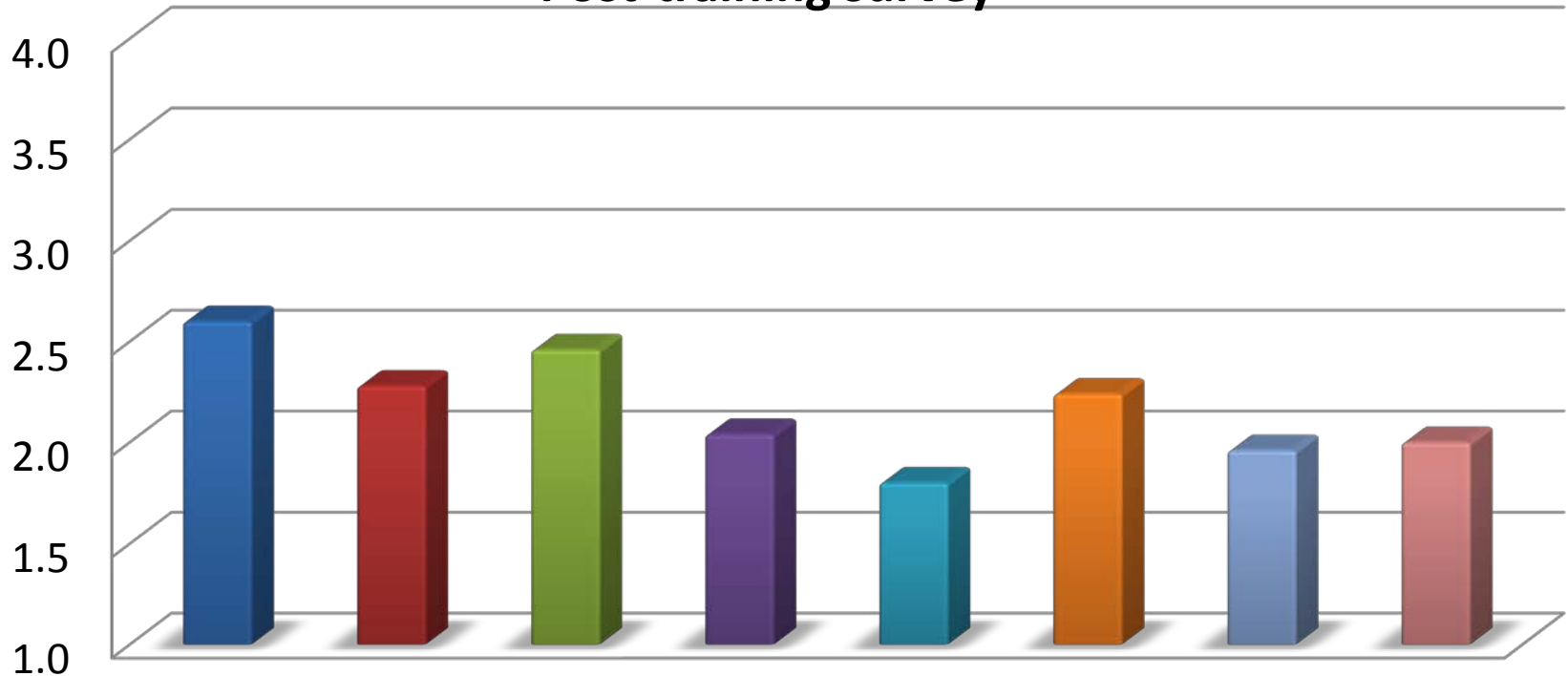
How often do your clients do each of the following since you started using coaching strategies on a regular basis? (more than before, about the same, less than before)



What do you feel you need additional training in?

(1=no need, 4=high need)

Post-training survey



→ Powerful questions

→ Reframing

Challenging

Accountability

→ Listening

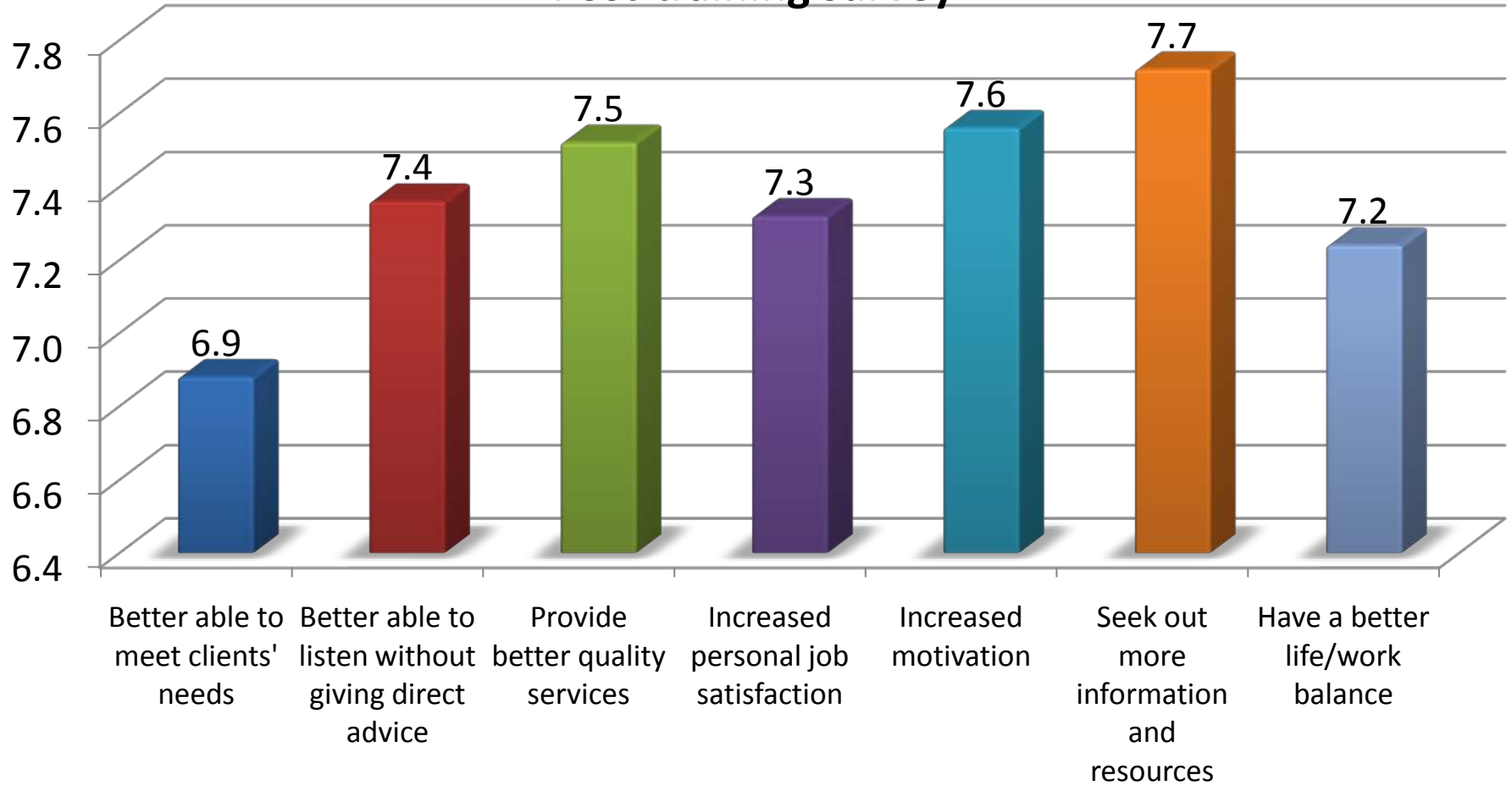
Taking charge

Brainstorming

Building rapport

How have coaching techniques impacted your work? (1=no impact, 10=high impact)

Post-training survey



Delaware Coaching Training Surveys

Delaware coaching training participants completed 2 surveys:

1. The standard pre-training survey
2. An initial post-training survey immediately after training (as opposed to the online post-training survey administered at the other training sites approximately 3 months after training) (n=27)
 - The initial post-training survey asked respondents **how they anticipated coaching training would affect their work**

Position & Experience

What is your role?

- Program Manager 5
- Client Counselor 7
- Administrator 7
- Funder 0
- Other 7

How long have you been in your field or profession?

- 0-1 year 0
- 2-3 years 3
- 4-7 years 2
- 8-12 years 6
- 13 years or more 16

Education & Race

What credentials do you hold?

•Associate's	3
•BA/BS	11
•MS/MA	6
•MSW	1
•MBA	2
•Other	3

What is your race/ethnicity?

•African American/Black	13
•Asian	1
•Hispanic/Latino	3
•White (non-Hispanic)	8

Agency Characteristics

Which best describes your organization?

- Social service agency 16
- Financial counseling 1
- Other 10
 - Advisory council 1
 - Advocacy (credit, housing, taxes) 1
 - College financial aid counseling 1
 - Consulting/Training business 1
 - Non-profit 2
 - Small business development 1
 - Social Venture-consulting and services 1
 - State Agency 1
 - University 1

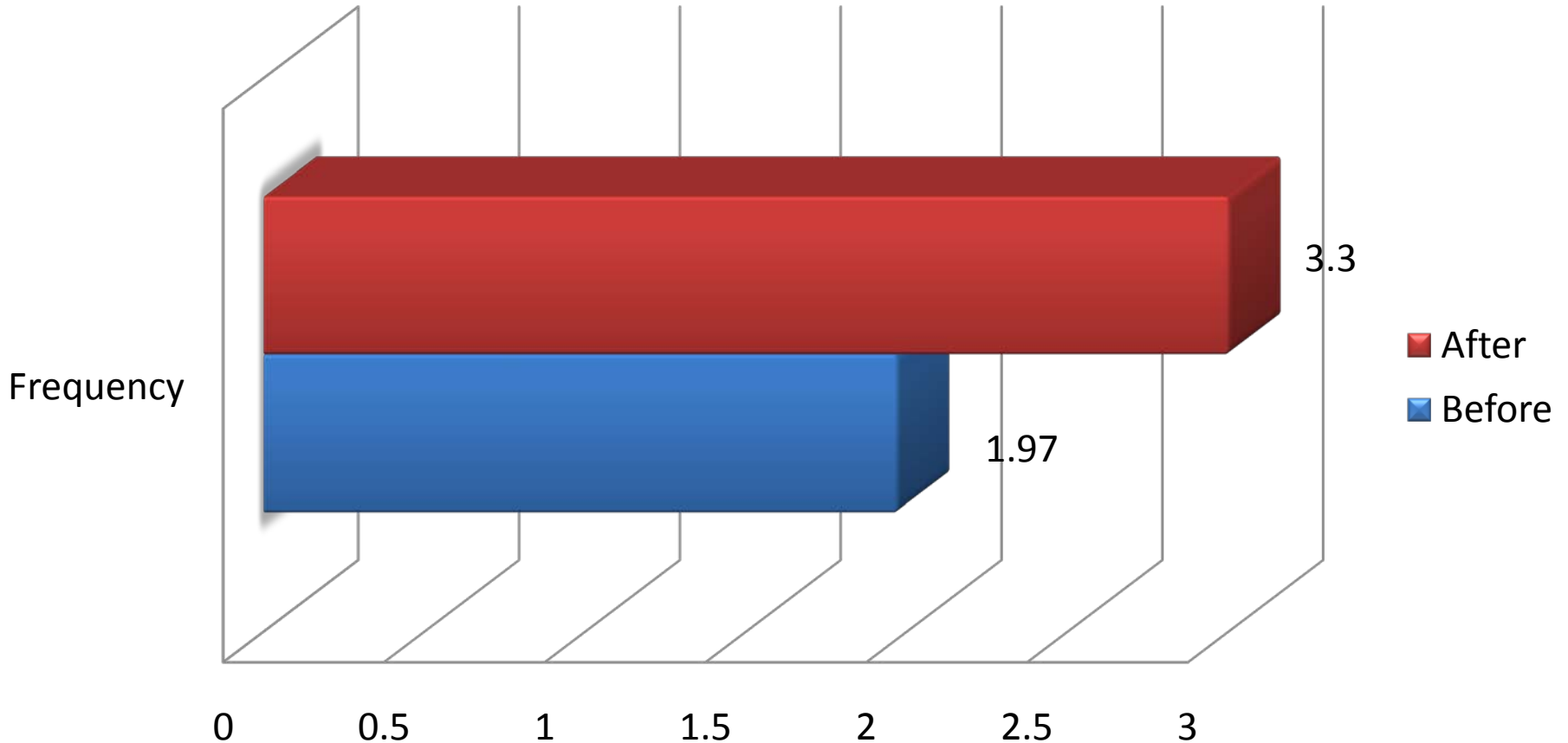
How many clients does your agency serve?

(approximately)

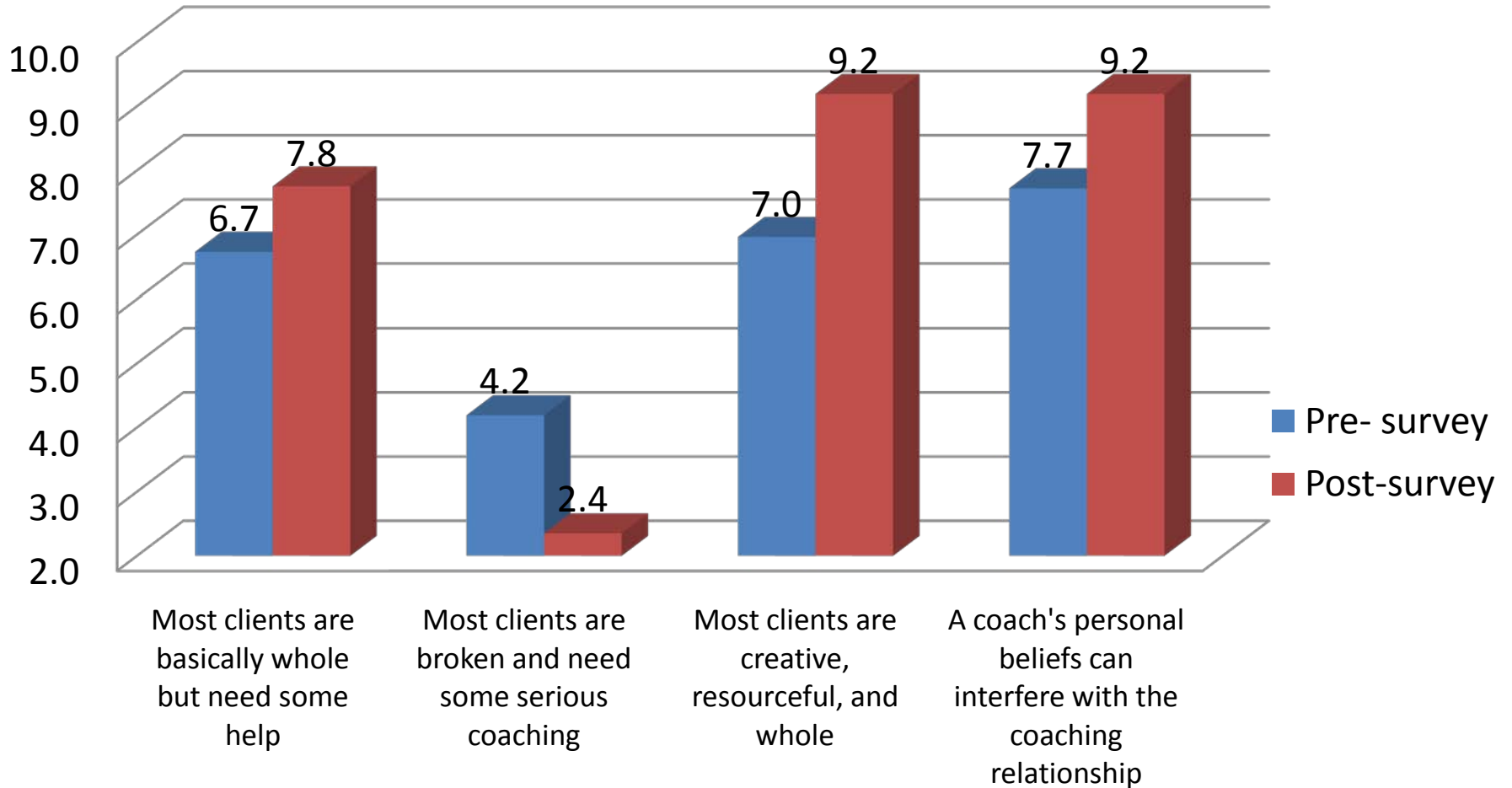
- 1,000 or less 6
- 1,001-5,000 1
- 5,001-10,000 2
- 10,001-25,000 1
- 25,001-50,000 0
- 50,001 or more 16

Use of COACH Model Increased

After (Before) the training program, how often do you anticipate using the COACH model or other coaching skills in your work with clients on financial issues? (0=never, 4=always)



Changes in Perceptions/Attitudes

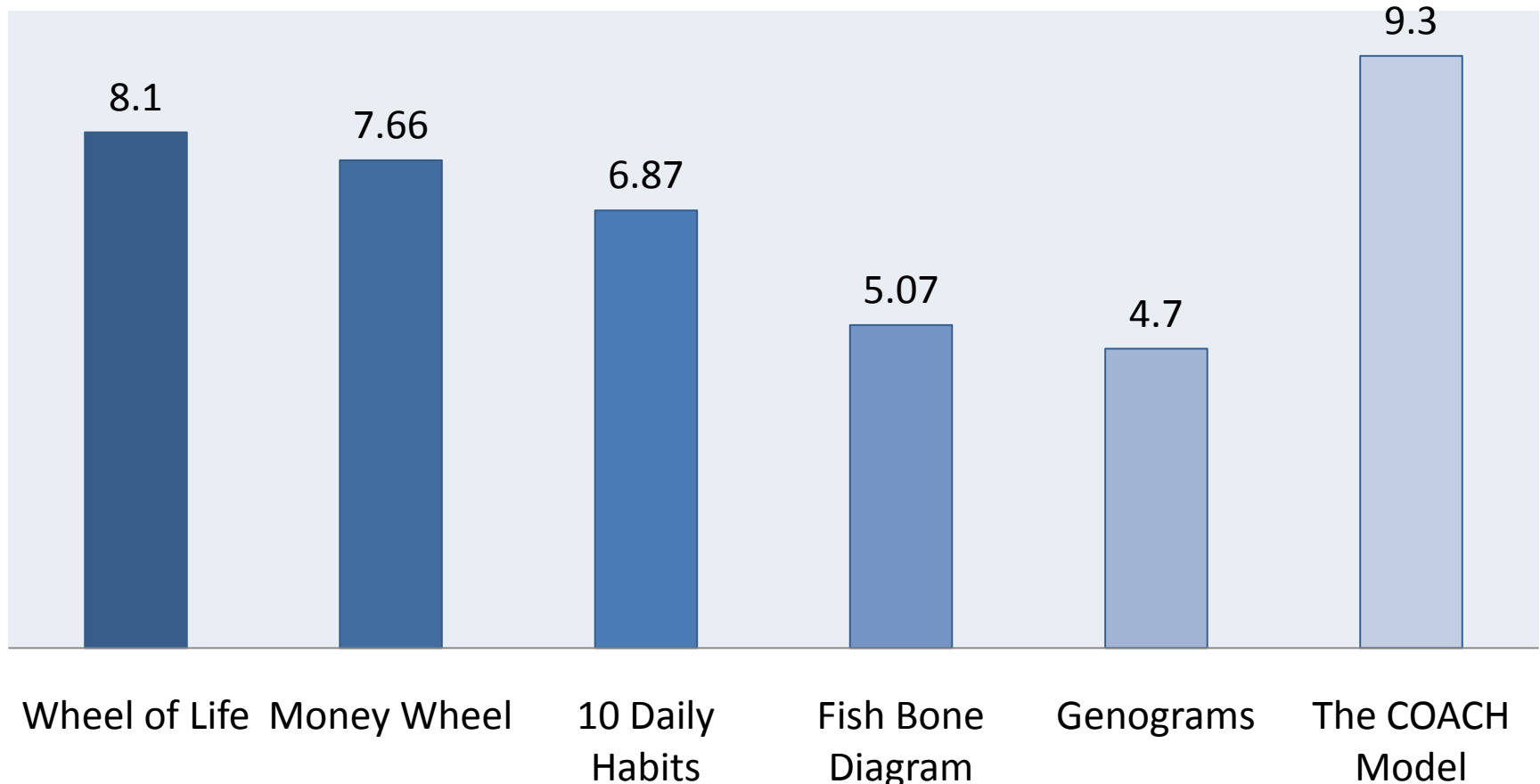


(1=completely disagree, 10=completely agree)

How much do you anticipate these coaching tools will impact your work with clients?

(1=no impact, 10=high impact)

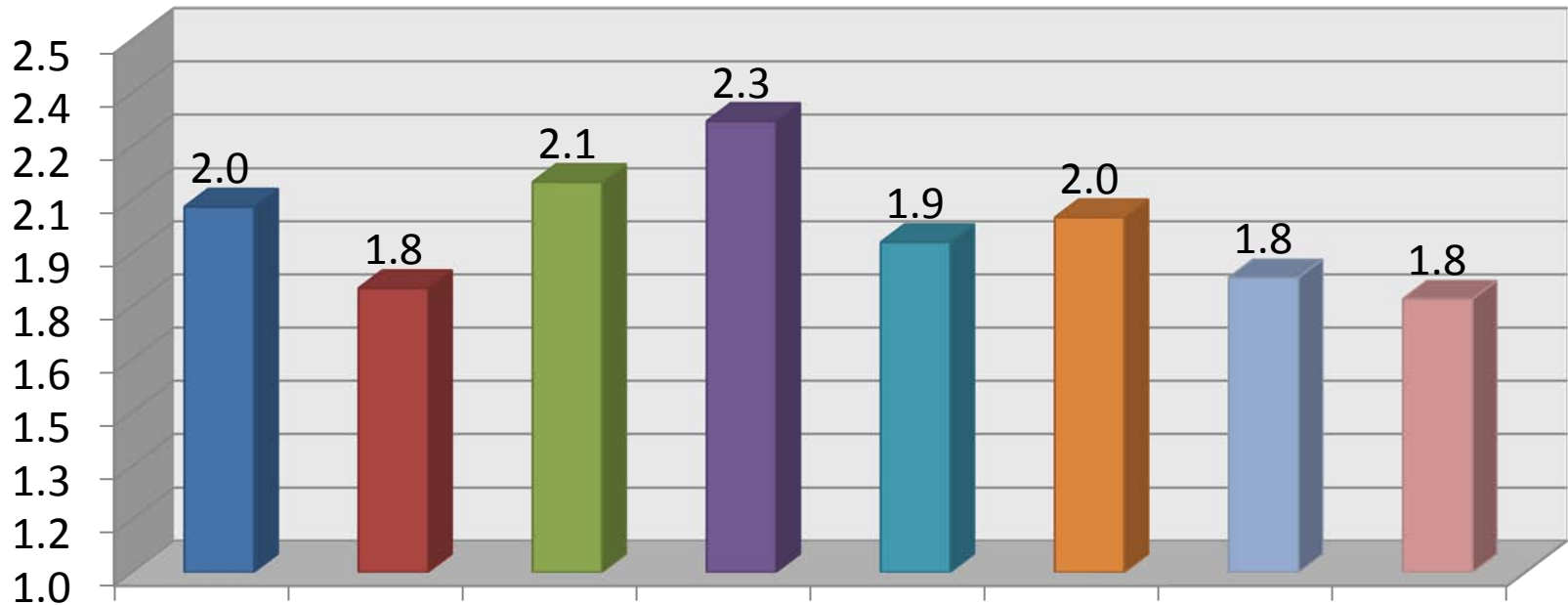
Initial post-training survey



What do you feel you need additional training in?

(1=no need, 4=high need)

Initial post-training survey



→ Powerful questions

→ Reframing

Challenging

Accountability

→ Listening

Taking charge

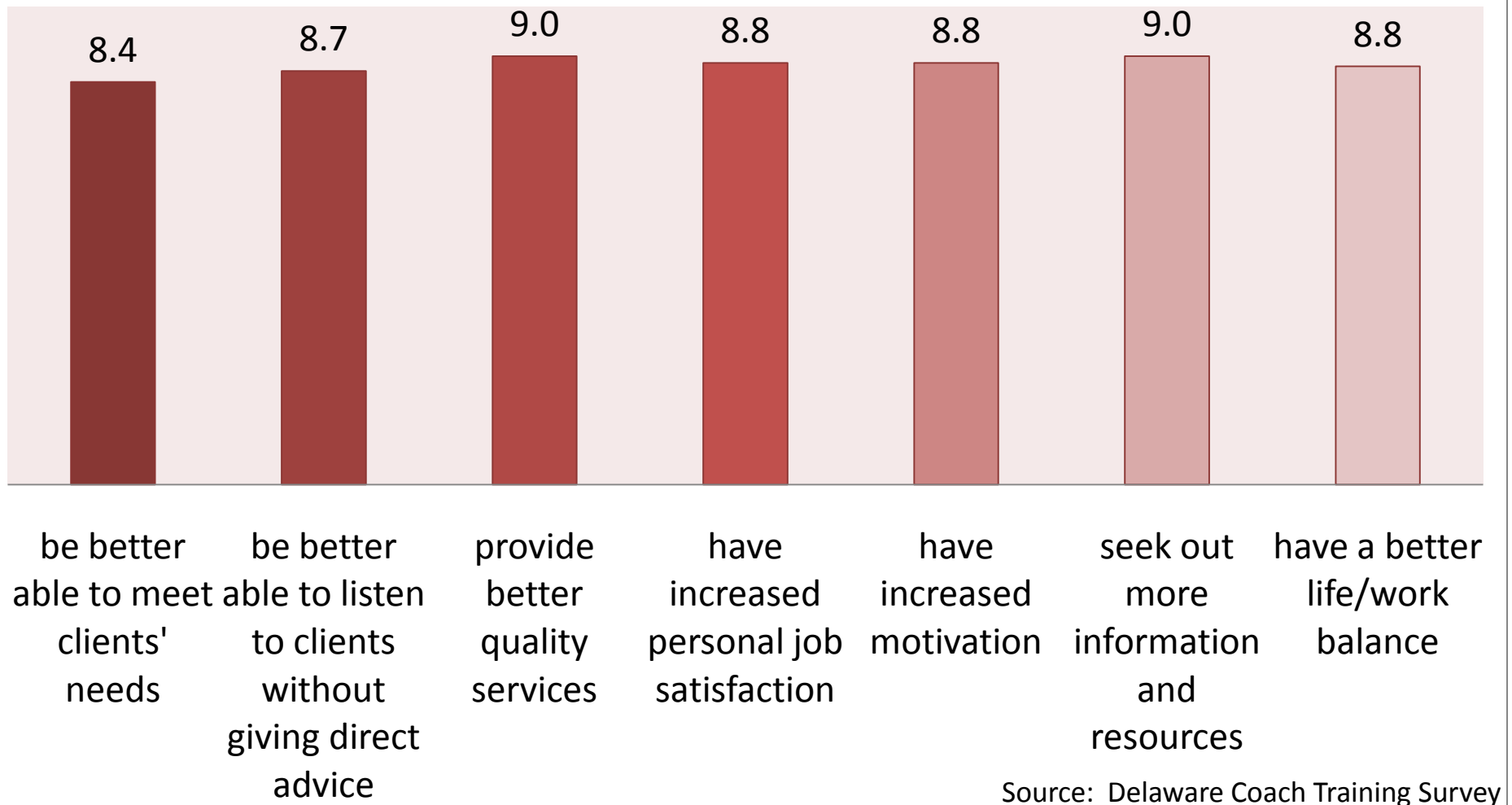
Brainstorming

Building rapport

How do you anticipate these coaching techniques will impact your work? I will...

(1=no impact, 10=high impact)

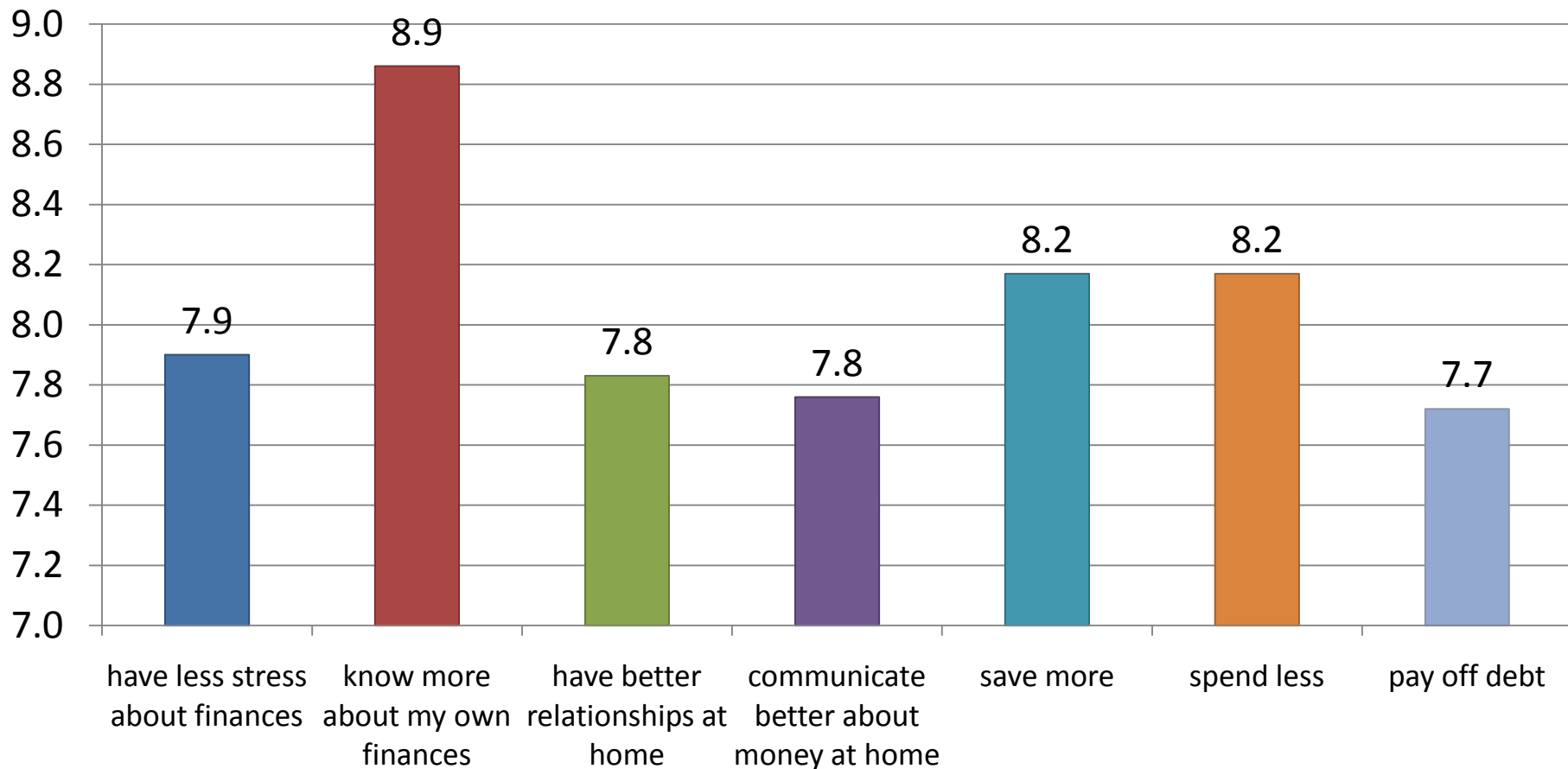
Initial post-training survey



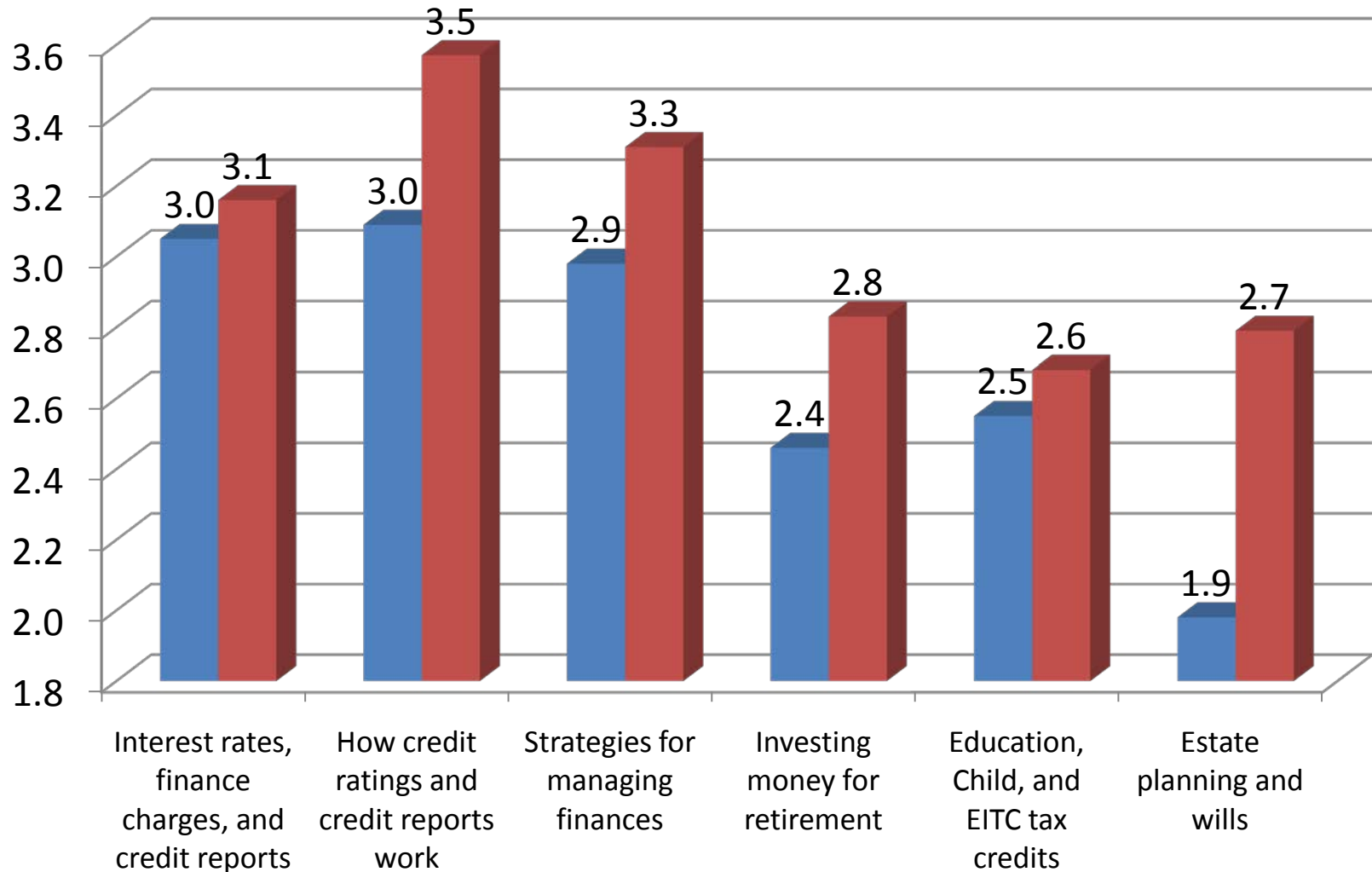
Source: Delaware Coach Training Survey

How do you anticipate using coaching techniques will impact you personally? (1=no impact, 10=high impact). I will...

Initial post-training survey



Self-Reported Knowledge Increased



Overall

- Trainings have some impact on self-reported knowledge and intentions
- Influences perceptions and attitudes
- Also personal impacts
- Some topics could be enhanced:
 - focus on tools and techniques in managing relationship

