Financial Coaching: Current Volunteer FAQ

Oh no, I can't make it to my appointment! What should I do?!
We ask that you please be attentive in marking off specific dates on your calendar in Appointment-Plus. If you have any doubts about a certain day, mark it off for safety's sake. If you've already been scheduled for an appointment that you won't be able to attend, please let Eliana know as soon as possible. If your appointment is taking place within the next 48 hours, call the appointment line at 512-610-4026 to inform them of the situation.

Ugh. My client no-showed. Now what?
Breathe. No-shows are no fun and this is definitely one of the most challenging aspects of the program. But since you're already here, now would be a good time to check in with your other clients. Haven't heard from Jane Spender since your appointment last month? Ask your Client Support Specialist to grab her file and give her a call from the office phone! When clients hear directly from their Coaches, they are more likely to follow through on homework or set up another appointment.

Can I get in touch directly with my client or do I need to communicate through staff?
As long as direct communications are related to coaching, you're more than welcome to get in touch with clients on your own. While we do prefer for most of the Coach/client interactions to happen at one of our locations, there are a few specific instances when direct communication is appropriate (e.g. to share documents, for brief check-ins and to set follow-up appointments). However, any plans made regarding upcoming appointments must be shared with staff and registered in Appointment-Plus. Conversely, if you ever want to share something with a client but you don't feel comfortable using your personal email address, you can always ask a Client Support Specialist or other staff member to facilitate the communication for you. We're happy to help!

I remember hearing about a resource during training but I can't remember what it was.
Have you checked the volunteer resource page? All of the resources that you saw in training will be on there, including the documents and forms devoted to debt, credit, budgeting and public benefits. It will be the homepage of any Internet browser that you use at the Community Financial Center or at: http://financial-coaching-resources.weebly.com.

It's hard to know if I've been effective without receiving feedback. How can I know if I'm doing well?
We have a few criteria to measure a Coach's success and try to use those to piece it together. First, we look at retention rates. It's very hard to establish a change in behavior after a single one-hour session. That's not to say that it's impossible but it's certainly more difficult. If you are able to retain clients, not only will they be more likely to enact the changes you've discussed but you'll be able to see those successes unfold firsthand. Second, we ask for clients to fill out exit surveys. For the most part, client reviews are overwhelmingly positive. If a client gives a less-than-stellar rating, we will check in with the client to see what influenced that opinion and if needed, follow up with the Coach to see how we can adjust. The same goes for glowing reviews – we'll let you know if a client goes out of their way to say something kind. In general, if you're not hearing your reviews, it means you're doing just fine!

I'm currently juggling too many clients and I feel like I'm burning out. How do I scale back?
There are plenty of ways to manipulate your schedule in Appointment-Plus but not all of them are intuitive. Let Eliana know that you want to slow down and she can help you figure out the best way to do so. This is a volunteer opportunity – it shouldn't be stressful.

My client has problems that are beyond my abilities. What should I do?
There are a few areas in which we can't give advice: Bankruptcy, legal issues, investments and debt consolidation. Ask your Client Support Specialist about referrals or consult the volunteer resource page. Other than that, even if some clients' situations may seem overwhelmingly dire, you can still provide them with the support, encouragement and accountability necessary to make progress. If it's a crisis situation, help them figure out what to do for the next few days or weeks. They've come to us because they know they need help and we will provide it to the *best of our ability*.

I have a great idea for a new program or resource. Can I share it with you?
Of course! We love to hear feedback and brainstorm ways to better serve the clients. However, keep in mind we're still a nonprofit organization, which means we have pretty limited resources to execute those ideas. If we don't act on something, it shouldn't be taken personally (nor should it be assumed forgotten). Please don't let it hold you back from sharing more – you never know what shape an idea can take.

I have hours available but I haven't seen a client yet. What's the deal?
Measuring volunteer involvement in tandem with client need is always a concern of ours. Our engagement with new clients is typically steady but it is also at inconsistent hours. So while there might be a need, it may not always be during the time slots that you're available. We keep a close eye on our Coaches' schedules and make adjustments to give them the best opportunity to see clients. With that being said, once an appointment has been scheduled, the program is at its most meaningful when Coaches and clients schedule regular follow-up appointments (retention is the best way to ensure a steady client flow).

I'm applying for a new job or educational opportunity. Can you give me a recommendation?
It would be our pleasure. Nothing makes us happier than to give back to those who give back. Let Eliana know a week in advance so she can put some thought and effort into making you shine.

How does scheduling appointments work?
Scheduling is appointment-based and Coaches will only be scheduled at their own availability. If a Coach knows that they have time to give on Thursday evenings from 5:00 to 7:00 PM, then they will only be matched with clients who are looking to meet during that time frame. Please note, just because a Coach is available during that time doesn't mean that they will be guaranteed an appointment each Thursday. All appointments will be made at least three days in advance.

I have a client who makes me uncomfortable or isn't making progress. What can I do?
Some clients might overstay their welcome or use your time in a way that doesn't feel productive. It's always a hard decision to make but sometimes it's necessary to turn a client down for an appointment or request. If you're having trouble handling a client's demands or think that you're being used more as a therapist more than a Financial Coach, please let Erika or Eliana know and they can help you brainstorm an exit-strategy.

I don't think this program is the right fit for me. Are you going to be disappointed if I quit?
Not at all! We completely understand and we welcome your feedback about what we could have done to improve the coaching experience. If you're questioning whether you want to continue volunteering, we encourage you to reach out to Eliana to chat further. Also, we could definitely use you in one of our other volunteer roles at Foundation Communities. Check out all of our opportunities at foundcom.org/volunteer.

Any other questions? Contact Volunteer Coordinator Eliana Brant at eliana.brant@foundcom.org or 512-610-7375.