

SUCCESS COACHING: **What is it? Why Do It? What are the Outcomes?**

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Content

- What is Success Coaching
- What are the Outcomes of Success Coaching
- Why is Success Coaching Important

Success Coaching

Case Management

- Case management is the act of investigating or collecting data, case by case.
 - Each case requires action (planning, counseling, educating, evaluating, calculating, documenting, analyzing, etc.)
 - Each case requires management or supervision of these actions by way of evaluating from beginning to end, resulting in measurable outcomes.

Success Coaching

Case Management cont'd

- The art of case management is determined by how well you:
 - investigate and collect data;
 - document;
 - coach the client and manage the data collected; and
 - obtain measurable outcomes.

Success Coaching

Case Management

- Includes developing individualized counseling plans for each client to spell out specific goals and action plans for solving situations.
- Work plans and tasks for both Success Coach and Client.
- The Success Coach is the case manager.
 - The goal of the case manager is to assist clients in ways that produce measurable outcomes for the client and agency.
 - The outcomes should line up with the vision and mission of the agency.

Success Coaching

Case Management Cont'd

- Case management by the success coach includes, but not limited to:
 - maintaining client files with good documentation and notes;
 - reviewing credit;
 - assisting with letters of explanation, disputes, and discrepancies to credit agencies;
 - developing a work (action) plan;

Success Coaching

Case Management Cont'd

- cash flow analysis and budgeting;
- scheduling appointments;
- making referrals;
- following up on clients progress;
- educating the client on the process (home purchase education, budgeting, loan process, down payment assistance, etc).

Success Coaching

Case Management Cont'd

- Work plans and tasks should be discussed between the success coach and the client.
- Each person has a responsibility to each other.
- The work plans, tasks, goals etc, should be documented and monitor by the success coach to keep the client on track.
- A timeframe should be implemented to measure the outcome of the action plan.

Success Coaching

Case Management cont'd

- To be effective, case management at the client's level must work in agreement with the agency wide policies & procedures for case management that connects counseling procedures with:
 - the agency's mission,
 - community resources,
 - program requirements and
 - program evaluation procedures.

What are Case Management Outcomes?

Success Coaching cont'd

- Case Management measures the performance and outcomes for the client.
- Case management is the tool necessary for providing statistical data to measure:
 - Vision
 - mission
 - goals
 - objectives and
 - activities (which includes funding).

What are Case Management Outcomes?

Success Coaching cont'd

- Case management allows you to clearly see if the client is performing.
- It measures the strengths and weakness of the program..

What are Case Management Outcomes?

Success Coaching cont'd

- o **Vision** – describes a view of the future and provides a picture of what could be rather than what should be.
- o **Action Plan** - commitment to a vision.
 - o An action plan (similar to a mission statement) spells out, the what, who and the why. Client –What do I want to accomplish?; Who are the key players helping me with my mission?

What are Case Management Outcomes?

Success Coaching cont'd

- o **Goals** - milestones for attaining the mission. They should be measurable and should specify end results to be accomplished
- o **Objectives** - should support goals, on a narrower scope. Objectives are applicable to a shorter time period and should be measurable actions.
- o **Activities** - the work of daily tasks performed to support the objectives

What are Case Management Outcomes?

Success Coaching cont'd

- Case management is the tool necessary for providing statistical data to Government agencies, such as HUD and prospective grant funding.

Why is Case Management Important?

- Accurate data collection helps us to portray the real need/demand for housing counseling that exists nationwide.
- It helps to determine the type of training counselors need to be effective. (For example: loss mitigation, reverse mortgage, foreclosure, post homeownership, etc.)
- Helps HUD and other funders make the case that more money is needed to serve clients and helps justify money for training for HUD approved housing counseling agencies.

Why is Case Management Important?

- Helps the Counselor track progress of clients to assure they are goal oriented.
- Helps agencies to monitor work activity of counselors to determine billable hours and training needed for housing counselors.
- It helps evaluate specific needs of your community.
- It can determine other agencies you need to partner with for referral services.