COACHING CLOSURE PROCESS

A participant or household’s enrollment in NAZ coaching strategies may end because they have expressed a desire to end participation, or because their Coach has been unable to make contact with them. It is expected that the coach makes multiple contact attempts using a variety of methods over a period of three months, which must be clearly documented in NAZ Connect.

Expectation and best practice is to use at least one form of written communication (mail or email), collaborate with partner staff, as well as consult regularly with your manager. Collaboration with partner staff includes (but is not limited to) requesting updated contact information and/or scheduling team meetings to attempt to make contact and re-engage the family together.

Enrollment may also end because the participant or household is no longer eligible due to any of the following reasons:
- they no longer live in North Minneapolis
- there are no longer any scholars in the home
- they are no longer enrolled at a partner site with a co-located Coach

In all cases, the Coach initiates the closure process outlined below.

Process Steps

Family Achievement Coach completes the following steps:
- Review household contact history and notes in NAZ Connect
- Enter a note in head of household’s record documenting reason for closure request
- Ping recommendation to manager

Manager completes the following steps:
- Review contact history documented in notes within the record(s) to determine decision.
  Manager may choose to contact the family directly to discuss closure. If Manager determines to move forward with closure, Manager mails closure letter to participant.
- Enter a note documenting decision in head of household’s record
- End all coaching enrollments in strategy participation widget by adding an end date
  - Coaching Recruitment or Family Coaching
  - Scholar Coaching
- Update coach instances on the team member subtab for all household members
- Update “is this person actively working with this participant” from yes to no
- Enter end date

*Please note: when a single participant ends enrollment, manager enters a note in the individual record and removes the participant from the household in NAZ Connect*