COACHING ENROLLMENT CHECKLIST

This document outlines the process completed by family achievement coaches to move NAZ families through Coaching Recruitment to Family Coaching.

Enrollment Process
Family achievement coach completes the following steps with the family:

- Review NAZ Toolkit
- Invite the family to make a College-Bound Commitment
- Ask the family to complete the Enrollment Form
- Print and have the family sign Initial Consent Form and Matrix ROIs, if possible

Afterwards, coach completes the following additional steps:

- Create records for additional household members and establish household
- Update strategy participation widget to reflect enrollment in Coaching Recruitment and add yourself as the active coach on the Team Member subtab
- Enter details from the enrollment form onto the appropriate tabs and subtabs:
  - Enrollment tab for all household members
  - Demographics/Contact tab (address, contact, birthdate) for all household members
  - EC placement subtab OR school enrollment subtab for all scholars only
- Review Enrollment Checklist report in Izenda.
- Ping your manager to request his/her approval of the enrollment
  - Manager uses Enrollment Checklist Izenda report to review the enrollment. Once confirmed, manager updates each participant’s strategy participation widget to document enrollment in Family Coaching strategy.
  - Manager enters a note in head of household’s record.
  - Log the resource in the head of household’s record.
  - Manager prints Gift Card Distribution Izenda report, signs it, and places it in Coach’s mailbox at NAZ Central. Manager pings Coach to notify report has been printed and signed.
- Once manager confirms enrollment into Family Coaching, coach completes the following steps to obtain gift card(s) for the family:
  - Coach takes signed report to Operations Assistant who provides gift card(s) to Coach.
  - Coach delivers gift card(s). Family signs the report to affirm they have received the gift card(s) and Coach signs to confirm they were delivered. If Coach is unable to deliver the gift card(s) within 48hrs, Coach returns report and gift card(s) to Operations Assistant and updates the status of resource(s) to “delete--mistake”
  - Once gift cards are delivered, Coach returns the signed report to Operations Assistant within 48hrs.
Meeting Structure and Gift Cards

1. Initial enrollment meeting

2. First achievement planning meeting
   - Complete age-appropriate education [profile tab] for all scholars and begin to set education goals
   - Provide family with enrollment gift cards:
     - $25 for completing the college-bound commitment
     - $50 for completing enrollment

3. Second achievement planning meeting
   - Review goals from last meeting and update as necessary
   - Provide family with initial achievement planning gift card ($25)

***NOTE
1. The standard recruitment period is no more than 90 days. Any recruitment which extend past this time frame must be approved by a manager.
2. If an individual does not make it through Coaching Recruitment, the strategy participation widget must be updated to reflect the end of Coaching Recruitment