



COACHING TRANSFER CHECKLIST

This document covers the circumstances under which a household enrolled in Family Coaching is transferred from one Family Achievement Coach to another, the process to complete the transfer, as well as initial action following the transfer.

Overview

There are various transfer types:

- Site move: current assigned Family Achievement Coach moves to another site
- Departure: current assigned Family Achievement Coach leave the role or leaves NAZ
- Pipeline: household is no longer enrolled at Coach’s site. These transfers happen in coordination across all coach teams each fall season as directed by manager team.
- Special circumstances: household requests a new Coach or other special circumstances

Process

Family Achievement Coach completes the following steps:

1. Confirm transfer eligibility:
 - Household is actively engaged with current Coach
 - Household is enrolled in Family Coaching
 - All household ROIs are current
 - All EC and k12 placement subtabs are current
 - Address is current
2. Determine transfer type: (circle one)

<input type="checkbox"/> Site move	<input type="checkbox"/> Departure	<input type="checkbox"/> Pipeline	<input type="checkbox"/> Special circumstance
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3. Ping manager to request transfer

Manager completes the following steps:

1. Confirm eligibility and transfer type:
 - Household is actively engaged with current Coach
 - Household is fully enrolled in Family Coaching
 - All household ROIs are current
 - All EC and k12 placement subtabs are current
 - Address is current
 - transfer type: _____



2. Review current EC placement subtabs, k12 school enrollment subtabs, FAST participation subtab, and current address on the demographics tab. Note any current enrollments at Anchor partners to determine which team to transfer the household to.
3. Ping the manager of the receiving team to propose the transfer.
4. Once transfer is approved and a new Coach is determined, current manager completes the following steps:
 - ❑ Enter a note in head of household's record documenting the transfer
 - ❑ Update all team member subtabs by ending current Coach and adding the new Coach
 - ❑ Ping both coaches and receiving manager to confirm transfer is complete and set a timeline for the warm handoff

Relationships are the Work: warm handoff meetings

All transfers must include a warm handoff meeting coordinated by the former Coach. Warm handoff meetings are critical to the transfer process because Achievement Planning within the Coach role relies on strong relationships with adults and scholars.

Warm handoff meetings happen in person with both coaches, within two weeks of the transfer. The meeting includes two parts:

1. Discussion between the two coaches, covering the family's history with NAZ and any additional information including what is logged in NAZ Connect.
2. Introduction of the new Coach to the family, including scholars if possible. For pipeline transfers, use this in-person meeting to also review and update ROIs in accordance with new partner enrollments (example: scholar was at La Creche but is now in kindergarten at Mastery, so Mastery needs to be added to scholar and parent's ROIs. Keep La Creche to preserve historic data)

When circumstances do not permit a meeting in person with the family, a conference call is permitted. At times, managers may step in to support as well, particularly when a Coach suddenly departs the role and/or NAZ.