

CARA'S RETENTION COACHING

Meeting the needs of our participants during COVID-19

When the pandemic hit, one of the first teams that mobilized was our coaching team. We saw that our participants and their families were navigating new challenges alongside new needs – from being laid off to having increased concerns about health and childcare options. While maintaining stability was always a key element of our coaches' role in helping participants retain and grow in their jobs, maintaining or regaining stability quickly became more important than ever. The following sections outline Cara's coaching philosophy, how our coaching operated previously, and how it pivoted amidst COVID-19.

Our Coaching Philosophy

"One year on the job" is something you hear a lot at Cara. It's not just because we believe it provides an important value proposition to our employment partners (although that's a big one). It's also because getting the job isn't always our participants' challenge; oftentimes, keeping the job is the bigger obstacle. So, when we say "one year on the job," it's for two reasons: (1) so that we can demonstrate to employers that hiring from Cara is an act of strategic advantage vs. an act of charity, and (2) to help people build the muscle of staying in a job to help them achieve long-term personal and professional success.

It's for these reasons that we made the intentional choice to walk alongside our participants throughout their first full year on the job, recognizing that life doesn't just happen over a few weeks or months. In fact, we believe that the journey of one year of employment isn't always a straight line; if you look closely enough, it often looks like a scribbly line that twists and loops – some steps forward, some back, and a few sidesteps. Instances like school starting, utilities surging, and life events happening throughout the course of a year may throw a person's stability into flux. Additionally, we've found that sometimes everyone just needs a cheerleader who will be there to celebrate the small wins ([especially if they don't have a community to support them](#)). So, as we navigate different opportunities and challenges with our participants, walking alongside them for a year has also been important for celebrating all instances of progress – understanding that the journey in the right direction is just as, if not more important than, a final destination.

To achieve this, we have coaches that support our participants from their earliest days in training through their first year in permanent employment. They are the ones who help them remove barriers to healthcare, housing, and childcare, and help them apply the lessons from training as they search for and ultimately retain a job. When a participant becomes frustrated with a situation at work, our coaches remind them to utilize "the power of the pause" to stop, listen, and think through solutions. The retention coach's job is not to *do* things for participants, but to walk *with* them and to help them navigate the barriers they're facing. They strive to know participants based on who they are, where they come from, and what's happening with them in the moment. Doing that successfully relies on the coach's ability to form trusting relationships with participants – using that same listening, honesty, and tough love that we all need from time to time to keep us on our path. Even if our coach hasn't shared the same experiences with a participant, they find common ground to build rapport and break down

barriers by paying attention, being a present listener, and deferring judgements. In doing so, coaches provide feedback while ensuring that the participant maintains their agency in the decision-making process – recognizing that while they can be there to support the participant, the only person in charge of their improvement is the participant themselves.

Through all of this work, our coaching helps our participants keep their job for at least a year; maintain stability; meet their goals in and outside of work; advance in their career, wages, or education; and achieve long-lasting success. It's a big job, but we've found that having a person who is there to keep them stable, troubleshoot challenges when they're having a bad day, or just be their number one fan, can be the difference between finding and staying on a job or giving up.

Twelve Months of Walking Alongside Participants (Pre-COVID-19)

In-person, one-on-one check-ins. One element that has been a cornerstone of our coaching has been frequent and personal check-ins. Once a participant finds gainful employment, the coaching shifts to job retention, and our coaches work to make sure participants hit that one year at the same job. Prior to COVID-19, they met with participants in-person each month during the year to see how they were doing in their new role, troubleshoot challenges, and discuss elements that could impact their personal stability. They also used this time to check in about the participant's job, including issues such as responsibilities, successes, the commute, and challenges, as well as non-work-related topics like health, recovery, finances, childcare, relationships, and goals for the future. When they met in person, our coaches would go out of their way to meet participants in a place of convenience. Whether it was at their place of work or at a nearby coffee shop during their break, we found that making these in-person check-ins as accessible as possible helped our participants stay engaged and connected – which directly tied to their ability to maintain stability and successful on the job.

Commitment to showing up. Oftentimes, we've found that our participants have been let down by others, and can be hesitant to trust. For this reason, our coaches are not just there during moments of crisis, but they also conduct persistent outreach to signal to them that “hey, we're here for you, and we aren't going to go away – no matter what.” They show up for participants to talk, work with them to create solutions, and connect them with needed resources. And they never quit. Regardless of whether a participant is a no-show or continually cancels appointments, our coaches follow up, whether it means calling, texting, or even reaching out to a family member to make sure our participants are doing okay. In doing so, we work to reinforce the socio-emotional and practical professional skills gained in Cara's experiential learning training to reach lasting success on the job.

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How did our retention coaches pivot in the midst of COVID-19?

Completing stability assessments over the phone. One of the first points of contact that coaches had with participants prior to the pandemic was assessing their stability when they joined the program. To do this, our

retention coaches completed stability screening assessments in-person, which focused on a holistic check-in, including health, housing, childcare needs, criminal background, finances, and other factors that could affect their stability or types of jobs they could work.

With shelter-in-place, our coaches shifted to completing these assessments over the phone, which didn't happen without some lessons learned. When stability screenings were conducted in-person, they allowed for a coach to create a safe space between themselves and the participant. This conversation took place in a closed, in-person setting. If any questions were triggering or required participants to reveal confidential or sensitive information, the coaches were there to provide immediate processing and support. Since shifting to stability assessments over the phone, our coaches have learned that they must be very clear with a participant about what the stability screening entails. Our initial phone screenings left a few participants feeling highly emotional and vulnerable, and without the safety net that an in-person meeting would have provided.

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To mitigate these risks, these calls have since been scheduled during a specific window and participants are given multiple notices of what they will entail. As participants are onboarded by our recruitment team, they are informed that they should take the call in a space that is quiet and private to answer questions clearly and fairly (which initially proved challenging for participants who took the calls around family, friends, or on their commute). Setting these expectations early has alleviated external pressure and has allowed participants to feel more

safe and secure. For those participants who don't pick up, coaches have rescheduled them. Now, more than ever, we recognize that our participants are dealing with new circumstances, and our coaches want to be able to assess the impacts they are feeling as accurately as possible, even if the conversation cannot happen in person.

Meeting participants where they are...virtually. Of course, it was not just intake assessments that needed to become virtual with COVID-19. Prior to the pandemic, retention coaching meetings with participants were primarily done in-person, because we learned that connecting with participants face-to-face allowed for stronger communication and learning. When COVID-19 hit, the biggest shift for our coaching team was pivoting to a 100% phone-based coaching system, which required us to ask new questions: With limited childcare options, what would this mean for essential workers who had small children? What would the stay-at-home order mean for our employed participants who lived in shelters or recovery homes and risked losing housing if they went to work? As our coaches shifted to phone-based coaching, they remained a crucial tether between participants and the greater Cara community to help them navigate those scenarios – not by choosing for them, but by helping them think through alternatives, always with the bigger picture in mind.

While moving from in-person to the phone was a pivot that the team could make rapidly, they quickly realized that participants were experiencing the pandemic in different ways, so they needed to ensure they were meeting each person where they were. This meant not only changing the frequency of communication, but also adapting the support they provided. They found that some participants sought more frequent check-ins, while others needed less. For most participants that had been furloughed or laid off, our coaches increased their communication touch-points to provide extra support, referrals, and financial assistance. They also individualized conversations to include planning for next steps based on what the participant and their family needed, such as applying for unemployment or identifying other resources. And in some cases, participants simply needed a trusted friend to hear them out, even if our coach did not have a solution to their problem. In making these shifts, our coaches continued to walk alongside our participants through the circumstances they were facing, offering a shared sense of empathy as they navigated new barriers and challenges.

Flexibility in retention commitment. While we were historically hyper-focused on helping participants stay one year on the job, our coaches quickly recognized the importance of showing flexibility in the retention commitment during COVID-19 and its economic impact. With around half of our participants in retention facing layoffs and furloughs, we didn't want participants to have to choose between a commitment to a job providing no hours or losing their participant status with Cara. We realized that to meet our mission, we have to give participants facing a period of unemployment due to COVID-19 the option to identify and seek what is best for their family. As different circumstances arose, we found that some participants wanted to stay connected to their employer and not search for jobs, while others wanted to re-engage with Cara's placement team to help them find new work. Because we saw a shift in the issues our participants were facing, we realized that we needed to move away from our traditional definition of "retention commitment."

As layoffs and furloughs rose, our coaches also pivoted to providing higher touch support in accessing unemployment benefits. While completing the application required some technical know-how on the part of participants, our coaches were able to provide soft-skill support and guide them through the application process. Additionally, when participants found it challenging to navigate the eligibility criteria or lacked the technical skills needed to complete the application with supporting documentation, our coaches were able to refer them to our financial coach or resources team to talk them through the application over the phone.

Through these instances, our coaches maintained the belief that participants should have agency in their situations. To understand how to support them, our coaches would ask, "what do you need most?" For some, it was a direct need for income, so they would re-enter the pool and look for jobs. Others chose to stay at home with their children, even if it meant being unemployed. Throughout the crisis, we've maintained that it's important for participants to be able to honestly say what their family needs, and we didn't want coaching to be a

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barrier to that. Whether its filing for unemployment, staying at home to provide childcare, or seeking job support, our coaches remained committed to accompanying our participants in their journey.

Connecting participants to the emergency fund. Finally, as we saw participants get impacted in their employment and stability, we understood that for some, making rent or finding their next meal was at risk. With the goal of keeping our participants on their pathway out of poverty, we launched an [Emergency Fund](#) that brought in \$90,000 to support their direct needs. With a direct line to our participants, our coaching team had the best sense of how our participants were being impacted, and worked to connect them to the fund, which provided unrestricted payments of up to \$500. They understood who was getting and keeping their jobs, how families were coping, what supports they had in place, and what they needed. As coaches checked in on participants, they were now able to provide more than an ear or a referral and provide tangible cash. And because they understood participants' needs and situations, they were integral in getting funds to those who needed it most.

What's Ahead? As we evolve, we will continue to reflect on what has worked well and what hasn't. While we have been grateful to be able to connect with our participants virtually, our pivot to a 100% phone-based coaching system was not without its own set of growing pains. Our coaches continue to learn what has worked naturally over the phone, and what coaching moments and conversations are better in-person. And, despite some learnings, our coaches have also found participants responding well to phone check-ins in a way that they didn't before. For some, it's been an opportunity remove any in-person power dynamics they may have felt and to truly connect with coaches as they would a trusted friend. As the economy opens up, we may develop a hybrid coaching model that incorporates both virtual and in-person meeting options in the long-term. In the meanwhile, our coaches will continue their phone-based screenings and check-ins. And coaches will continue to listen and ensure that participants retain their agency during this difficult time.

As we continue to adapt, we'll provide updates on [Cara Plus' LinkedIn page](#) so that as we learn, you learn too. We also know that we're in a constant state of learning and experimentation. If you or your organization has pivoted its approach to participant engagement and coaching or if you'd like to be highlighted on our social media, message us at learn@caraplus.org.

About Cara Plus: As an entity of Cara, Cara Plus engages leaders to build, deploy, and grow strong workforce solutions so that people affected by poverty have the access and opportunity to get back to work. In 2020, we are committed to making many of our resources and learnings free to create opportunities for learning and dialogue as we collectively wade through the impact and aftereffects of COVID-19. To access Cara's resources, and learn about digital events – as well as future in-person events and partnership opportunities – follow our [LinkedIn page](#) or visit www.carachicago.org/resources.

About Cara: Cara's mission is to unlock the power and purpose within our communities and ourselves to create real and lasting success. Through its personal and professional development and access to employment opportunities, Cara serves as a leader in poverty alleviation in Chicago and beyond. Since 1991, more than 6,500 people have been placed into more than 10,000 jobs and started on their path to self-sufficiency. To learn more, please visit www.carachicago.org.