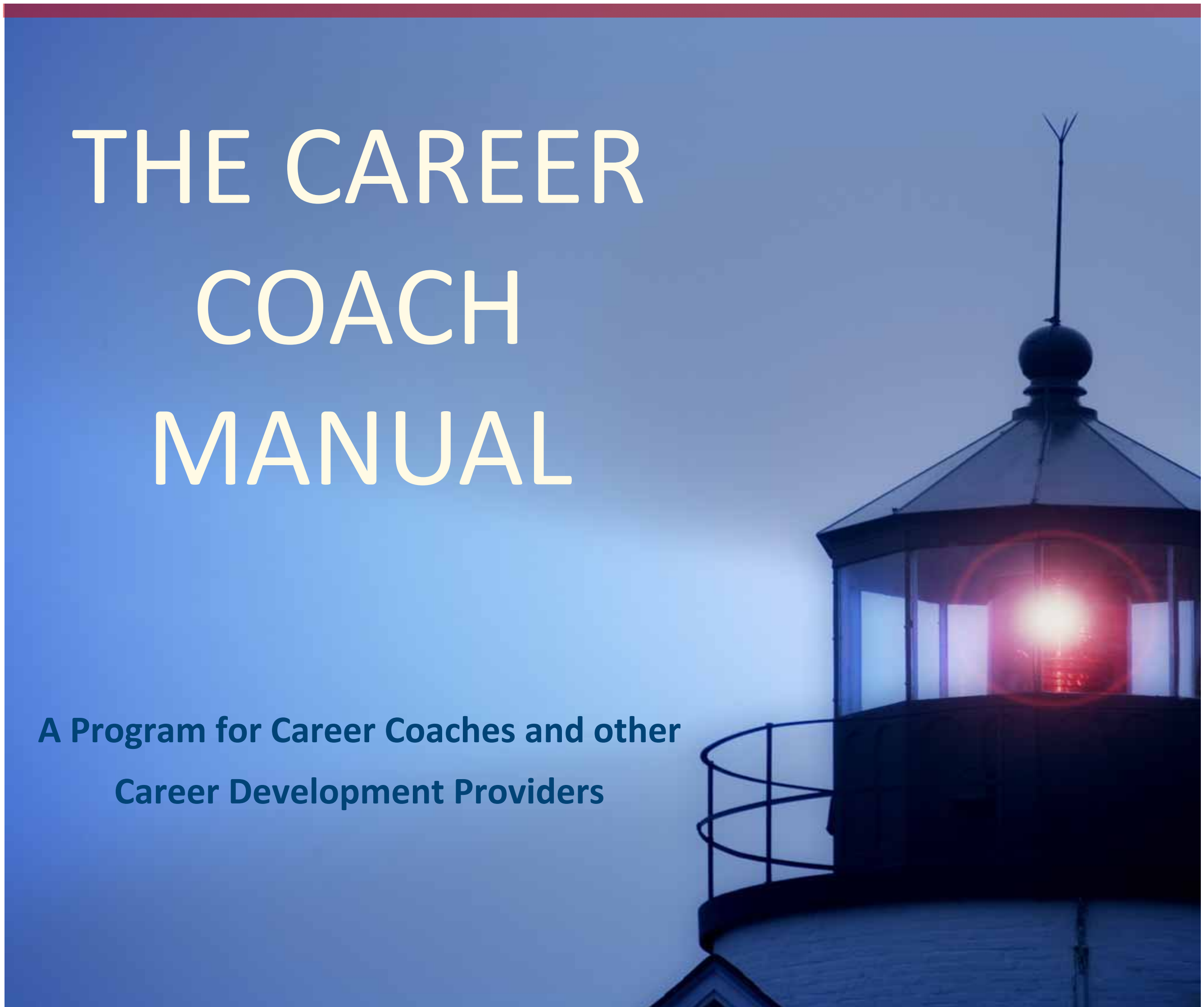
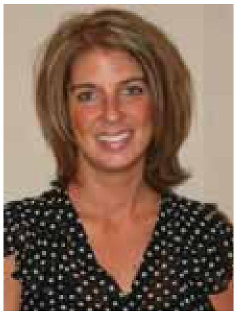


THE CAREER COACH MANUAL

A Program for Career Coaches and other Career Development Providers

DRAFT



About the Author

Lee Payne is the managing owner of Discover YOU, Career Coaching and Consulting. A new workforce development business with a Mission to generate change by empowering people to create an extraordinary life through getting to the heart of what it is they were born to do. And teach others how to do the same.

Discover YOU and its business concept is born from Lee's eighteen – months of work with Bill Guest and Eric Heller at Metrics Reporting, Inc. where her principal role was the Director of First Choice Career Coaching (FC3). Her focus was developing and implementing coaching and employee development programs working with employers, educators and workforce development organizations to build effective communities around both of these efforts.

Through the development process Lee sought the help of industry experts Steve Robbins at ACT and Susan Blair at Career Calling, LLC. Both of whom lent insight, guidance and expertise to the process as well as development of support materials and process. Then, participating in the Career Coaching process herself, Lee became aware her strengths strongly support the Career Coaching work, and had a natural desire to help others find their passion.

Lee also lead efforts in the healthcare practice, specifically projects for the West Michigan WIRED Grant. This included the prototype development of a Healthcare Employee Forecasting project for the region, the creation of the West Michigan Healthcare Hot 50 Occupations and a Career Lattice/Ladder project incorporating the Hot 50 Occupations and the O*NET/CLEG Occupational Databases for healthcare occupations.

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Table of Contents

1.0 Introduction

In Section 1 you will be introduced to the basics concepts of the Career Coaching Model:

- ✓ What is structured career coaching?
- ✓ A comprehensive, yet simple four-step process
- ✓ A look at the customer experience and the stakeholder benefits

1.1 Overview

The Career Coaching Model is based on:

1. WorkKeys Assessments: Reading for Information, Applied Math and Locating Information
2. Personal Skills Assessments: Performance, Talent and Fit
3. Structured Four-Step Process

The Career Coach guides participants through interpretation of their assessment results, exploration of top career options, making informed decisions and creating a plan of action to obtain a career in their best-fit occupation.

The participant's overall experience results in an Endorsed Career Portfolio, and helps an individual decide, "Do I go to work, or do I go to school?" Some participants will do both. The benefit of each outcome is:

1. Ready for Work
   - Individuals get and keep a good job
   - Employers get and keep good employees
2. Ready for School
   - Individuals get on the path to earn credits that lead to a Certificate, Degree or License while increasing their performance and becoming more engaged students
   - Schools get good students who will persist to completion to increase the schools' retention/completion rates

The model assures that we send employers good workers and schools good students by the participants making a more informed decision about their career choice. The process includes closed-loop feedback in follow-up with Supervisors in job placements and participants in school at 90 days and one year. This data is in turn fed back into the process to assure that the assessments, the coach, the training and the employer carry out their role in the process, and if necessary, adjust and improve.

1.2 Process

The Career Coaching Model is highly structured, bundling key ACT products – Reading for Information, Applied Mathematics and Locating Information WorkKeys Assessments certified with National Career Readiness Certificate (NCRC), Personal Skills Assessments (PSA) Performance, Talent and Fit all managed in the DISCOVER® online tool to maximize participant results.

Four sessions occur with a certified career coach within a target period of three weeks. *(See Sample Schedule in Standard Documents Section 7)* Homework is required between sessions. Taking the WorkKeys assessments and obtaining a NCRC are program prerequisites.

The participant is guided through four steps: (1) The initial session is in a group setting to administer the PSA, learn DISCOVER® and review and interpret assessment results in order to explore career options. Homework involves further exploration. (2) Participants combine their assessment results and narrow their options to the three best-fit occupations. They are shown various ways to research them, and given the decision maker tool as homework. (3) By session three, the participant has a good understanding of their best fit occupational target is and explain their findings to the coach. Additional planning research tools are identified and ideas to create an education and/or employment plan generated to complete the last homework assignment. (4) Participants present their plan results to the coach and taught how to present their Career Portfolio.

Participants leave the process empowered with a well-honed Endorsed Career Portfolio supporting them with information they need to prepare, then get and keep a good job. Once placed in a skilled position, participants understand that a 90-day and one-year review with their supervisor will occur.

1.3 Customer Experience

Without confusion or issue, participants should experience a smooth transition from awareness and knowledge of the Career Coaching Program through to becoming raving fans of their experience, in a voyage of self-discovery.

Participants become aware of the Career Coaching opportunity through a partner, word of mouth, view of a retail location, or various marketing strategies. When seeking information participants should complete a Career Coaching Readiness Questionnaire which fully outlines the process and helps them decide if they are ready to be active, committed participants. It is helpful if they have already taken the WorkKeys Assessments and obtained their National Career Readiness Certificate. But this can be arranged prior to starting the Career Coaching Program.

When participants commit to the program they are either being funded by a partner source or paying a fee out of pocket to a center. At this time they are oriented to the process further, sign a Participant Agreement and complete a short Intake with either an Office Administrator or the Career Coach. They also get a facility tour. Then they are set up in Discover and assigned homework. Before leaving Orientation they enter a planning stage which sets up the next four appointments over the course of three weeks. They are advised of the need to keep their appointments, that they should expect homework and will need to arrange day care and transportation.

Next is the four-session series where participants interact in either a one-on-one or group setting. The sessions follow the process outlined above. Participants are accountable for all the required work throughout each session. The Career Coach only provides guidance.

During these four sessions it is possible that the Career Coach may refer them to outside sources (counseling, life skills training, literacy) or additional training services like resume writing, job interviewing, employment skills training or job search assistance.

After that, participants are responsible to implement their action plan. Action plans outline how to either obtain an education or find employment, or both. Participants are encouraged to contact their Career Coach at any time and know the program will conduct a Participant survey in 30 days; And again if they enter a training program at 6 months and one year. A survey will also be sent to their Employer at 90 days and again after one year. Participants can also expect to receive periodic emails to update contact information or report their current status.

Participants experience renewed self-confidence and feel empowered through the process because they have a better self-understanding and improved their skills. Most participants will experience someone caring for them and their careers in a much different manner than ever before. It can be an overwhelming experience, as referenced in the *Heart of Health Care Career Coaching's Success Stories*.

Reports from clients should include follow-up concerning the degree of satisfaction with school and inform the coach when they obtain their degree, certificate or license. Follow-up is also important when they are in their job they love and on a clear path forward.

Many participants tend to maintain long-term contact with their coach because the coach is someone – like a favorite teacher – whom they feel they can trust and who gives them positive feedback and encouragement.

Ultimately we look forward to their success story to provide to us and share with others.

1.4 Stakeholders

Systemic change involves many stakeholders. If possible, all stakeholders should undergo the Career Coaching process so that they can speak to the benefits and have a full understanding of exactly how it works and how it differs from traditional 'career coaching'.

This list of stakeholders is specific to the success of Career Coaching:

Suppliers: The majority of the participants come from the following groups: Employers (incumbent workers), Workforce Development Agencies (transitional workers) and Post Secondary (emerging workers). This process also would benefit populations at High Schools, Human Services, Corrections and Adult Learning. The experience also would benefit walk – in participants.

ACT: As the trusted and main assessment provider, ACT assures the quality of its assessments.

Career Coach: The Career Coach is responsible for putting participants at ease and helping them feel comfortable throughout the process. Participants' success is measured in outcomes of school and job placement.

Remediation Sources: Roughly 20% of participants need some level of remediation. Many resources are available but Career Coaching typically relies on KeyTrain, Literacy Centers and Adult Education.

Employers: The process works with all industry verticals, the main focus being on the major industries in a given state or region. Companies should require an Endorsed Portfolio and in return guarantee a face – to – face interview to an applicant possessing the same.

Schools: Participants will be referred, unbiased, to locations that offer training for the current job market specific to their needs. Participants will be guided to programs that will produce a certificate, degree and/or license.

2.0 Career Portfolio

Here you will be introduced to the importance of the Endorsed Career Portfolio:

- ✓ Content description
- ✓ Employer's require or 'highly recommend'
- ✓ Presentation methodology

2.1 Description

A Career Portfolio consists of several required items. It is not considered an Endorsed Career Portfolio, however, unless it includes the signed Certificate of Completion of the four – step coaching process. Items comprising a Career Portfolio are:

1. National Career Readiness Certificate (NCRC)
    - Reading for Information
    - Applied Mathematics
    - Locating Information
2. Personal Skills Assessments (PSA)
    - Talent
    - Fit
3. Certificate of Completion of the four – step coaching process
    - Self – Awareness
    - Career Option Exploration
    - Career Decision – Making
    - Action Planning
4. Resume, references, and referral letters
5. Individual Development Plan – Education and/or Career Plan
6. Existing training certificates, degrees or licenses

2.2 Employer Significance

The Career Portfolio provides employers with information they need to make better hiring decisions. Employers save considerable time and money if they have targeted referrals as opposed to sorting through stacks of resumes from people who may or may not be appropriate for a job opening.

Employers understand that the experience an applicant can cite in their Career Portfolio often provides a pin-point referral to an applicant who understands their personal value equation. Such applicants know where they belong in the market.

Employers should require or highly recommend that all job applicants have an Endorsed Career Portfolio, and require a portfolio from every point in the supply chain: Public Workforce, Recruiting and Staffing Agencies plus anyone who walks in the door.

Likewise, employers should promise a face-to-face interview to every person who has earned a Career Portfolio related to the occupation for which they are recruiting. The paradigm shift is that an employer recognizes a Career Portfolio holder is serious about work and career of choice and should be asking, "Where might this applicant fit with us?" Applicants who are still in training should also be considered for entry-level positions.

Lastly, an employer who hires a participant of the Career Coaching program should participate in the 90-day and one-year Supervisor feedback via survey from ACT and the facility they were coached from.

2.3 WorkKeys

Every participant must take the following WorkKeys Assessments:

- Reading for Information
- Applied Math
- Locating Information

These assessments not only measure cognitive ability but also how that ability is applied within the workplace. The result of these assessments will determine the level of National Career Readiness Certificate – bronze, silver, gold or platinum – participants can obtain.

All participants should hold their NCRC and letter that outlines both their level and scale scores for their portfolio. The NCRC verifies to employers that a worker has essential core employability skills in Reading for Information, Applied Mathematics, and Locating Information.

For more information regarding the WorkKeys assessments please view:

http://www.act.org/workkeys/

2.4 Personal Skills Assessments

In or before the first session, every participant takes the Personal Skills Assessments: Performance, Talent and Fit.

These assessments measure the participant's potential through factors in terms of job behavior, performance, and productivity. The tools address challenges at every stage of the talent management process. More exactly, they measure:

- Performance measures attitudes and risky behaviors
- Talent measures personal traits and attitudes
- Fit measures interests & values

Participants Talent and Fit reports are incorporated in their Career Portfolio. They will understand the results and be able to highlight key points to potential employers.

More detailed information regarding the Personal Skills Assessments is available at http://www.act.org/workkeys/assess/personal.html.

2.5 Presentation Methodology

The Career Portfolio is a tangible outcome of a comprehensive process that provides an important experience for the participant. Each must be able to describe not just the Portfolio's content but what those contents mean to the marketplace and how he or she arrived at the decisions which the Portfolio exhibits.

A Career Coach will show participants how to present their Portfolio and then role play as a Personnel Officer listening to the Participants presentation. The Career Coach will provide feedback and guidance on how to improve.

2.6 Key Documents, Resources and Training

DOCUMENTS

Career Coaching Certificate of Completion

Individual Development Plan CC_PAR_IDP011.00

RESOURCES

ACT – www.act.org

ACT Employer Handbook

TRAINING

Career Portfolio Presentation

3.0 Preparation & Orientation

The Career Coach needs to prepare for participants and take necessary steps to complete a proper orientation:

- ✓ Participant awareness and self selection
- ✓ Important steps in a participant's orientation
- ✓ Necessary preparation each step of the way

3.1 Participant Awareness & Pre-Requisites

Participants become aware of the Career Coaching opportunity from various avenues. Typically participants are referred from three distinct workforce groups: incumbent workforce, transitional workforce and emerging workforce.

Participants could seek job assistance with a supplier partner like a workforce development agency, career service center or employment firms. Other partner agencies would be employers, students and post-secondary schools, youth programs, human services, or corrections. Participants may learn of Career Coaching via word of mouth, marketing materials or by seeing a retail location.

Before participants meet with the Career Coach in Session One, they complete a Career Coaching Readiness Questionnaire; turn in their current resume and copy of both their scale and level scores from the WorkKeys Assessments: Reading for Information, Applied Math and Locating Information. Participants should also have or be in the process of obtaining their National Career Readiness Certificate (NCRC). If they do not have their Certificate, the Career Coach assists them in setting up their MyWorkKeys Account and getting their NCRC.

3.2 Career Coaching Readiness Questionnaire

The Career Coaching Readiness Questionnaire is one of the most important tools in the Career Coaching program. This tool screens participants on industry focus and initial occupational interest. It also measures whether the participant is ready to enter the Career Coaching process.

Found in the Section 7 – Standard Documents, the questionnaire is a 3-page long series of questions to provoke thinking about employment and what it takes to become job ready. It also provides details of the program so that the participant self-selects that they are, in fact, ready to enter the process. Likewise, it gives insights and creates expectations about what participants face in earning their endorsed Career Portfolio.

Participants must turn in their Questionnaire, resume, and WorkKeys Score Report prior to their first session for review by the Career Coach.

3.3 Participant Orientation

Career Coaches familiarize themselves with new participants by reading the Career Coaching Readiness Questionnaire, WorkKeys Score Report and resume by either (1) reviewing the participants file or (2) doing the initial participant set-up.

Upon arrival participants should be given a facility tour, so they understand the logistics and are comfortable in the environment.

Participant set-up involves gathering biographic information on the Intake Form and starting a participant record in the database. If a person has no email address, it is necessary to set them up with one and then verify the contact information.

All participants must sign a Participant Agreement with their Career Coach. The agreement stresses that they will complete all four sessions, will complete their homework, and understand what it takes to earn the endorsed Career Portfolio.

All participants receive a Participant Packet. The packet includes an overview of the sessions, details on how to earn a Certificate of Completion, and necessary forms and reference materials. Once the materials are reviewed, set up the participant in DISCOVER® and orient them to its use.

Before the participant leaves: (1) Assign homework to complete inventories and explore DISCOVER®, plus review materials before Session I. (2) Schedule the next four sessions over a three -week period *(see sample schedule Standard Documents)* and (3) Assure all the participants questions are answered.

3.4 Prepare for Step 1

Career Coaches prepare for new clients by meeting with others (case manager, HR Representative), if possible, to provide description of services, obtain client background and lay groundwork.

Career Coaches also should review questionnaires, WorkKeys Score Reports, resumes and Email participant to welcome them and send schedule reminders and reiterate expectations.

3.5 Remediation

If the participant cannot obtain their NCRC due to their existing scores, they should be introduced to remediation services, like KeyTrain, to build their foundational skills prior to entering the Career Coaching program.

There are many avenues for remediation in both foundational and personal skills.

KeyTrain has skill building exercises for both. The participant can take these exercises online to raise their WorkKeys scores as well as many employability and soft skills learning opportunities.

Some locations that provide Career Coaching may offer a variety of workshops.

Local assistance is also available at the Literacy Center or Adult Education locations.

Each Career Coach should create a comprehensive list of remediation and training references available for participants that will ensure his or her success.

3.6 Key Documents, Resources and Training

DOCUMENTS

Intake Form

Participant Packet /Participant Agreeement

DISCOVER® Handout

RESOURCES

Participant File / Database

DISCOVER® Log In

Microsoft Outlook for Scheduling

Proctor or WorkKeys Validus Log In/Password

TRAINING

DISCOVER® training

Validus training

WorkKeys Proctor

*Depending on the set up of your center, the Career Coach may perform all or some of these steps. Some centers will have an Office Administrator that can perform many of these duties.

4.0 STEP 1 Self-Understanding

Here you will be introduced to the process a coach follows with the participant in Step 1 of the Career Coaching Program:

- ✓ Preparation necessary before Session 1
- ✓ Introduction and Assessments
- ✓ Assessment interpretation

4.1 Introduction

Prior to session, the Career Coach should set aside enough time to review the participant's intake and database information to assure all questions are answered and complete. If not, this information is gathered as participants arrive or before they depart at the Session's end.

The Career Coach provides a warm welcome to participants.

Session 1 is typically occurs in a group setting, which can be uncomfortable for many participants. The role of the Career Coach is to put all participants at ease and manage the introduction and interaction of the group.

Participants will provide a brief introduction of who they are, tell how they came to the program and what expectations they have of the program. The Coach should make notes about the group's comments on a flip chart or board.

Then Career Coach introduces participants to the program's details: Assessments, tools and resources to support development, coaching to focus career goals, guidance to prepare financial plan, educational plan and/or job search plan. They guide the participant in making an informed career decision.

4.2 Review Homework and Session 1 Agenda

All participants should have reviewed their Participant Packet as homework after their Orientation and prior to Session 1. They also should have researched to understand their WorkKeys scores and have completed the work in DISCOVER®.

The Career Coach should review and ask questions regarding this homework, and determine whether anyone had difficulties or needs further assistance.

At this point it is time to refer to the proper documents in the Participant Packet and review the agenda for the time left in Session 1.

4.3 Personal Skills Assessments (PSA)

Before Session 1, the Career Coach (or Office Administrator) pre-registers participants for the Personal Skills Assessments (Performance, Talent and Fit) according to a specific naming practice. *(See PSA Registration Procedure in Standard Documents)*

Fifteen minutes prior to participants taking each assessment, the assessment must be authorized by the coach to activate the assessment for the participant.

The Career Coach introduces participants to the Personal Skills Assessments and makes clear that there is no pressure to answer right or wrong as in the foundational assessments. The Coach directs participants to answer first based on their gut reaction and then in more detail explains the following:

- Performance takes 10 to 15 minutes and has 60 survey items. It measures personal behaviors and attitudes critical to workplace success. A higher score indicates a higher likelihood of having successful work attitudes and engaging in safe behaviors.
- Talent takes 30 to 40 minutes and has 165 survey items which assess personal and workplace behaviors and attitudes. The report helps identify participants' strengths and weaknesses relating to the likelihood of success in the workplace.
- Fit takes 15 to 20 minutes and has 102 survey items which determine the fit between your work-relevant interests and values and the characteristics of occupations. Worker satisfaction and commitment are associated with a greater fit.

Participants are instructed to remove their PSA instructions from the packet. The Career Coach then administers the assessments by helping participants log on, answering questions and providing guidance on how best to fill in the preliminary data. It is important to provide verbal instruction on how to fill out their individual occupational choices.

4.4 Review Assessment Results

As each participant completes the assessments, the Coach prints the results and explains in more detail how to interpret the results of Performance, Talent and Fit.

This interpretation can involve both group and individual interaction. Participants can share their results if they are comfortable with that or the Career Coach can use example assessments for purpose of the discussion.

It is critical to engage the participants, listen to their questions and comments and provide proper answers to all questions. The Coach can reference the ACT PSA website for participants that may want additional information: http://www.act.org/workkeys/assess/personal.html.

4.5 Discuss Career Options

Participants now start to narrow down their career options by looking at the full battery of assessments: WorkKeys, PSA and DISCOVER®.

The Career Coach should refer to the Participant Packet and instruct participants to combine results and record several of the best ten occupations that correlate across assessments. They should take 3 to 4 occupation suggestions from each assessment and look for similar relationships and fits. Before the session ends, assure the participants are clear on how to identify these occupational options.

The Career Coach should also make reference to high demand jobs and introduce participants to DISCOVER® and demonstrate its' tie to ONET Online by providing an example of how to look up occupations and what the information reveals.

4.6 Assign Homework

Instruct participants to complete homework by recording proper information in DISCOVER® and researching career options in more detail.

Participants should take additional time to review the assessments, noting any questions they may have, and assuring they have a good list of targeted occupations. They then must research those occupations further, thinking about the jobs of interest, knowing that the next session they will be required to identify their top 3 occupational interests. Assure times for Sessions 2, 3 and 4 and scheduled for each participant.

Career Coaches will record any pertinent notes made during the session in the database and attach the electronic assessment results to the participants file. Career Coaches should be prepared to answer email and phone questions between sessions.

4.7 Key Documents, Resources and Training

DOCUMENTS

Participant Packet

PSA Instructions

RESOURCES

Flip chart

Database

Computer stations

WorkKeys Assessment Admin Site

ACT PSA Website

Admin computer and printer

ONET Online

DISCOVER®

TRAINING

Personal Skills Assessment Administration and Interpretation

5.0 STEP 2 Explore Career Options

This chapter introduces the second step of the Career Coaching Program:

- ✓ Guide the participants' homework review so that they talk openly about how they arrived at three best fit occupations
- ✓ Emphasize the importance of thoroughly researching these three occupations and teach the research methods
- ✓ Introduce the Decision-Maker Scorecard© and its questions that will assist participants in finding the best fit occupation

5.1 Review Homework and Results

Session 2 is typically a one-on-one between coach and participant. It is the coach's responsibility to help the client feel comfortable and assure that they understand the agenda and ready to proceed. The beginning of the 30 to 45 minute session is spent with the participant reflecting on their Assessment results and reviewing how they identified their career choices.

The Career Coach may need to guide participants in further narrowing occupational choices helping them recognize similarities and patterns across occupations. Methods to do this include getting participants to think out loud and determine what hidden beliefs might be harboring.

Further discussion should occur around what, if anything, participants discovered online about O*NET and the level of demand for the selected occupations.

The Career Coach should note the participants' three best-fit occupations in the database.

The Coach should review DISCOVER® with the participant to assure they completed their homework and understand how to review and store occupations.

5.2 Research

Participants' research into their career choices is the most revealing – and often exciting – self-discovery path for the best-fit occupation. The Career Coach should reference the Participant Packet and review the Exploration Worksheet. The Worksheet outlines many reference websites, as well as best practices in job research.

The Coach's most significant and lasting aid for participants is training in job research best practices. These practices, which lead to lasting results, include: Informational interviews, job shadowing, training and special projects and volunteer work. Hands on experience and/or speaking to someone that has done the job are highly encouraged.

Obviously, it is not always possible to complete all the practices listed above. Any that the participants do not complete can be added to their action plan. The Coach, however, at the very least should encourage each participant to complete an informational interview. To that end, the Career Coach should be prepared with a list of names and occupations for interviewees. The Coach should also walk the participant through the Interview Handouts to assure their understanding of the process.

5.3 Resources

DISCOVER® and its resources will assist in narrowing the best fit occupation. The Coach should outline particular regional resources for given occupations and discuss the variance in job titles, and how employers usually have different requirements for jobs with similar descriptions. Most employers are willing to talk about their company and the jobs they have offer if someone calls with an organized agenda and clear questions.

At this time it is wise to have participants start noting whether they need training and if so, what schools offer the necessary programs and what those programs cost.

Career Coaches should also have Tool *Kits (see list in Tab 6 of Career Coach Notebook)* or similar resources so they can provide information and answer questions with authority. Such resources would include information that identifies Hot Jobs, Career Ladders, Employer Forecasting and Planning needs and Schools and Programs. If not available, this information needs to be developed. A Career Coach should have a comprehensive resource set to give the participants the best possible chances of success.

It is important for Career Coaches to keep up on area employers and their needs as well as educational programs that match.

5.4 Decision – Making

With participants possessing the means to research their three best-fit occupations, the next step is to narrow those to one best fit. Referring again to the Participant Packet and Decision-Maker Scorecard©, it works best to have participants record their top three occupations and then walk them through criteria to assure their understanding of the tool.

Once the Coach is confident the participant understands, assign the completion of this Scorecard as part of their homework. Inform the participant that, based on their research of the top three, they now must reduce the list to one target occupation, or to a career progression on which to base their Education and/or Job Search Plan.

5.5 Assign Homework

Although there is only the Decision Maker Scorecard© to complete and return, the participants must exert a lot of effort in narrowing down the target occupation. It is important to stress the more research the better. Participants should document their results in DISCOVER®

Participants should be prepared the next session to discuss what research they completed and how they arrived at their results.

Again, the Career Coach should be prepared to assist participants between sessions 2 and 3, listening to their concerns, and then diagnosing how best they can be helped in order to complete their research to achieve real results.

5.6 Key Documents, Resources and Training

DOCUMENTS

Assessment Results Worksheet

Resource Worksheet

Decision-Maker Worksheet

RESOURCES

DISCOVER®

Internet

Coaching Tool Kit

Local Employers

Local Schools

TRAINING

6.0 STEP 3 Decision - Making

This chapter introduces the process steps in Session 3 of the Career Coaching Program:

- ✓ Participants present how they arrived at best-fit occupational choice
- ✓ Assist participants in determining what plan type they should develop
- ✓ Review IDP and teach participants how to create a working document

6.1 One Best-Fit Occupational Choice

Session 3 is typically held one-on-one between coach and participant. It is the responsibility of the coach to help the client feel comfortable and assure he or she understands the session's agenda.

It is important to assure that the participant is ready to proceed. The beginning of the 30 to 45 minute session is spent reflecting on the participant's research and reviewing how they arrived at the best-fit occupational choice. At this point, participants should present the Decision-Maker Scorecard© results and any additional research they completed.

The Career Coach should guide discussion by asking about what the participant learned, whether the results match the participant's values and assessments and how the participant feels about moving toward this as their occupation.

6.2 Identify Plan Type

The Individual Development Plan (IDP) is a tool provided for participants to capture what they uncovered during the Career Coaching Program and to create an Action Plan leading to career success.

There are typically two types of IDPs, Educational or Job Search. Occasionally a participant may not have been able to choose a single occupation and will need to add a step to complete more extensive research prior to finalizing either type of plan. Depending on their existing qualifications and training, some participants will create both an Educational and Job Search Plan. It is the job of the Career

Coach to help the participant understand what exactly the IDP is and to guide them on how to choose and create the right type of Plan.

6.3 Review Individual Development Plan (IDP)

The Career Coach should first orient the participant to the IDP Form. Next, coach and participant should start to complete the form together.

The first section is devoted to assessment and session results. It then asks the participant to undertake action-oriented planning. Participants accomplish this by setting both immediate and long-term goals with realistic completion dates and outlining the steps they must take to attain those goals.

The Career Coach should then help each participant create one goal that will help them meet the plan, so that they can complete the rest of the plan criteria for their homework. Action plans should include activities and deadlines over the next few weeks and months.

Depending on the type of plan, the Career Coach should again provide resources and guidance on what to research in order to have a thorough IDP. This can include how to research educational opportunities, financial aid, available jobs, job search techniques, etc.

6.4 Assign Homework

The assignment for Session 4 is for the participant to be ready to present a complete IDP to the Career Coach and update that progress in DISCOVER®.

Again, the Career Coach should be prepared to assist participants between sessions 3 and 4, listening to their concerns, and then diagnosing how best they can be helped in order to have completed their IDP for Session 4.

At the end of the Session the Career Coach will update the necessary information in the database.

6.5 Key Documents, Resources and Training

DOCUMENTS

Decision-Maker Worksheet

Individual Development Plan (IDP)

RESOURCES

DISCOVER®

Educational Websites

Job Search techniques

Internet

TRAINING

7.0 STEP 4 Action Plan

This Chapter introduces the process steps in Session 4 of the Career Coaching Program:

- ✓ Participants present Individual Development Plan so the Career Coach can provide feedback
- ✓ Career Coach helps create and then teach how to present Career Portfolio
- ✓ Discuss follow-up and any additional services

7.1 Plan Presentation

Session 4 is typically held one-on-one between the coach and participant. It is the coach's responsibility to help the client feel comfortable, to assure he or she understands the session agenda and to assure the participant is ready to proceed.

The beginning of the 30 to 45 minute session is spent with participants reflecting on their research and reviewing how they arrived at their Individual Development Plan (IDP) choice. Participants should present their IDP in full and any additional research they completed.

The Career Coach should guide discussion by asking questions, giving feedback and filling in gaps with suggestions. The coach should determine whether the participant is comfortable with their IDP decision. The coach likewise should identify what the participant feels will work, or will not, and whether they sense barriers or issues. If appropriate the Career Coach can assist in problem solving or refer them to another source.

Too, the coach provides information about obtaining educational funding and conducting a job search. The coach provides resume writing advice and provides further research ideas. If a participant needs more details and instruction, the coach can refer them to in-house workshops or other opportunities for success.

It is important to emphasize the participants' need for lifelong learning and if participants have not already done so, encourage them to look beyond finding employment to creating a career path.

Before moving away from the IDP, the coach should determine whether participants have all the necessary elements to achieve one or both of the outcomes of the program: Educational Placement or Job Placement. The program's ultimate goal is for participants to get and keep good jobs that are above median wage.

7.2 Assemble Portfolio

The Career Portfolio is the tangible outcome of the Career Coaching Program. The coach should guide the participant, help assemble the elements of the portfolio, and explain its short and long-term importance. It is important to note that the experience the participant goes through to create their portfolio is what an employer values, not just the portfolio itself.

Portfolio contents are outlined in Chapter 2 of this manual.

Participants should be instructed to always keep a master copy of the portfolio and be able to produce copies if needed. Participants are responsible for their portfolio materials; however the Career Coach can direct an individual to where they could reproduce or order a new copy.

7.3 Portfolio Presentation

The Portfolio exhibits the participants' experience during the Program. It is important that they not rely solely on the documents but also be able to articulate to a potential employer what exactly the documents are, and the process by which they arrived at their decisions.

The Career Coach should model for participants how to present the Career Portfolio and participants, in turn, should address their presentation to the coach. The coach should provide feedback on the presentation and how to improve and deliver it in a relaxed and conversational manner. Most participants reach that point only if encouraged to rehearse until their presentations are virtually second nature. This is an important step on how to handle with different employer's who may have a better understanding of the Career Coach program or those that do not have any understanding at all.

It is imperative to remind participants that theirs is not considered an Endorsed Career Portfolio until they receive the signed Certificate of Completion.

7.4 Additional Services

Based on program results, roughly 20% of participants will not receive a signed Certificate of Completion. Participants who do not qualify will receive a letter with a checklist of suggested additional training. Coaches should reiterate that some training may be required in order to obtain the certificate.

Program results indicate that roughly 40% of participants will earn an Endorsed Career Portfolio and that additional services would increase their chances of success. It is appropriate at this point for the Career Coach to suggest those services or at least inform the participants that they may have a letter of suggested training along with their signed Certificate.

When participants need more details and instruction, coaches can refer them to in-house workshops or others that offer: resume writing, employability skills, interviewing techniques, etc. Career Coaches should have a comprehensive list of services needed and available.

7.5 Follow Up

As the session closes out, coaches should discuss with participants areas where there will be follow up and encourage them sign an Opt-In Form.

Coaches should share *The Heart of Health Care Career Coaching* Success Stories and ask if they would participate in creating a success story. Depending on the success, there may be additional marketing opportunities. The Career Coach should provide contact information to participants along with the generic email address and ask them to contact you with changes in demographic information or status, such as school completions, jobs obtained or job promotions.

In the event that a Career Coach leaves, every center should have a generic mailbox.

The more a participant reaches out to a center, the less tracking the center must do on the back end. Participants should be advised that from time-to-time they will receive requests to update their demographic information, complete surveys, and provide status updates. Participants may also receive an occasional newsletter.

Also, participants should be reminded that once placed in a job, follow-up will be completed with their Supervisor at 90 days and one year. Likewise if they are in school, they will be contacted at 6 months and one year.

The center should also contact participants sixty days prior to a participant completing their training to discuss confidence in their job search and whether they need to create a new Action Plan. Explain that this tracking, measurement and follow-up make the program uniquely collaborative with all partners. It also provides quality control and continuous improvement.

The Career Coach will document necessary results of Session 4 in the database.

7.6 Key Documents, Resources and Training

DOCUMENTS

Individual Development Plan (IDP)

Career Portfolio Documents

RESOURCES

Workshops

Additional Services

TRAINING

8.0 Participant Critical Touch Points

Here you will find additional details on how a Career Coach interacts with participants while they implement their action plans:

- ✓ Why are there critical touch points with a participant
- ✓ What are the touch points for each plan type

8.1 Critical Touch Points

Participants are reminded in the fourth and final session of specific follow-up and points of contact that are important to both their success and the quality of the Career Coaching process. Often, participants keep their Career Coach apprised of their progress because they are excited, proud and have a new trusted relationship.

Not everyone follows up however, and participants have different experiences and struggles. Therefore it is important for the Career Coach to stay in contact at critical touch points regardless of whether the participant created an Education or Job Search Plan.

8.2 Education Plan

When a participant completes an Education Plan, the three critical touch points are enrollment, status and attainment.

The first shows that the participant did, in fact, enroll as planned at the same institution, on the same date and in the same program.

Secondly, coaches should check on participants' status periodically to assure that they have maintained their enrollment and are progressing in their training. The checks assure the participants are still on target for completion and enrolled in the same program.

Lastly, to congratulate the participants when they obtain their certificate, degree, or license and complete their Education Plan.

After each contact, the Career Coach should make the appropriate updates in the database.

Although it is not the responsibility of the Career Coach, it is important to remember that a survey will go to the appropriate faculty at the training facility at 90 days and one year for feedback.

8.3 Job Search Plan

When a participant completes a Job Search Plan, the three critical touch points are when the search is initiated, search status and attainment.

The first touch point is to assure the participants start their initial job search and are successful reaching out to employers. It is good to ask the participant if they are able to communicate the value of their Career Portfolio and ask for the employers' reactions.

Secondly, the coach should periodically check to determine whether participants are still actively conducting their job search and that they still are on target and not discouraged. It is important to provide encouragement and listen for needs. It may make sense to suggest additional training to improve skills or restore search excitement.

Lastly, it is important to congratulate participants when they obtain employment and complete their Job Search Plan. The coach should record date, salary, job title, employer, supervisor and supervisor contact information. Other information that a coach might discuss with the participant is to assure they found work in their field, and – if not – what hurdles they encountered. It is also important to find out what was helpful about the Career Portfolio and if the participant found they needed any other support or information.

After each contact, the Career Coach should make the appropriate updates in the database

Although it is not a Career Coach's responsibility, it is important to remember that a survey will go to the Supervisor at the job at 90 days and one year for feedback.

8.4 Key Documents, Resources and Training

DOCUMENTS

Individualized Development Plans

RESOURCES

Career Coaching Database

Computer

Phone

TRAINING

9.0 Post Session

Following are the steps involved in 'closing out' a participant and what accompanying paperwork and computer work tasks must be accomplished:

- ✓ Behavioral observation and its impact on the signed Certificate of Completion
- ✓ What constitutes the database files as complete
- ✓ Other follow-up and surveys

9.1 Behavioral Observation

Career Coaches are required to complete a behavioral observation concerning participants and their interaction over the four sessions of the Career Coaching Program. This exercise is also referred to as Participant Readiness and includes the coach's on whether a participant is, in fact, (1) Ready for Work or (2) Ready for School and that the participant can be successful.

The Behavioral Observations Standard Document *(located in Standard Documents Section 7 of Career Coach Notebook)* outlines factors to take into consideration. The coach should also consider appearance, timeliness and completion of homework assignments. Based on these factors, each participant is rated on a level of 1 to 5 as Ready for Work and Ready for School and what level an individual is capable of achieving. These scores are added to the database.

Completion of this observation triggers the outcome for completion of the Program. There are three possible outcomes:

1. A signed Certificate of Completion
2. A signed Certificate of Completion with suggested additional workshops/training that will increase skills and enhance the chance to complete action plans successfully
3. A letter outlining what training a participant must complete in order to receive a signed Certificate of Completion.

All participants will have a Career Portfolio. The portfolio, however, is only considered an Endorsed Career Portfolio if it includes a signed Certificate.

Employers will only guarantee a face-to-face interview with participants who possess the signed Certificate.

Employers understand the signed Certificate is Coach's green light of a targeted referral; someone the coach is confident will succeed in their training and/or occupation of choice.

The Career Coach will sign the Certificate of Completion.

9.2 Files Complete

It is important to assure that all paperwork is complete. This would be whatever paperwork needs to be in participants' files at the center for which the coach works.

More important, all required database information must be up to date. This data is critical to assess the program's progress, to send out follow-up surveys and to conduct follow-up contacts with participants.

Too, it is crucial to update the database if participants email or call with new information.

9.3 Follow Up

The Career Coach must assure mechanisms are in place to conduct necessary follow-up as outlined in 8.0 or to follow through with any other agreements made with participants. Participants who are willing to share their success stories should be referred to the proper person.

In case the Career Coach leaves, remember to always provide participants a number for the center and the generic email address.

Career Coaches also need to make sure that their tools and resources are up to date and that they forge relationships in the area with both employers and educators.

9.4 Participant Survey

Participants are sent a survey 30 days after completing the program. The survey evaluates the participants' experience with the assessments, coaching, training and job.

Career Coaches can review survey results as a valuable source of feedback information.

9.5 Key Documents, Resources and Training

DOCUMENTS

Behavioral Observation Form

Training / Workshop Checklist

Certificate of Completion

RESOURCES

Participant File

Database

TRAINING

10.0 Portfolio Upgrades

A participant can enhance their Career Portfolio. This chapter outlines upgrades that should be considered.

10.1 Additional WorkKeys

In addition to the major WorkKeys Assessments embodied in the National Career Readiness Certificate, the system measures several other important job skills.

These assessments measure real world skills that employers generally believe are critical to job success.

The skill components are:

Communication:

- Business Writing
- Listening
- Reading for Information
- Writing

Problem Solving:

- Applied Technology
- Applied Mathematics
- Locating Information
- Observation

Interpersonal:

- Teamwork

10.2 Job Profiling

Job Profiling or Analysis identifies the skill requirements and WorkKeys skill levels an individual must have to perform successfully in a given occupation.

More detailed information about job profiling is available at:

http://www.act.org/workkeys/analysis/index.html

11.0 Process Framework

The work of the Career Coach is outlined in detail in the Career Coach Manual. Because Career Coaching is a highly structured process a detailed diagram and procedures are outlined below.

11.1 Process Chart

The Career Coach Process Chart is a visual representation of the Career Coach Manual and further outlines specific documents, resources, training, and procedures that are relevant to that step in the process.

3.0 PREP & ORIENT	4.0 STEP 1	5.0 STEP 2	6.0 STEP 3	7.0 STEP 4	9.0 POST SESSION
PROCESS					
Introduction	Introduction	Introduction	One Best Fit Occupational Choice	Plan Presentation	Critical touch points
Core Elements Presentation	Review Homework	Review Homework	Identify Plan Type	Assemble Portfolio	Behavioral Observation
Participant Awareness	Session 1 Agenda	Session 3 Agenda	Review IDP	Portfolio Presentation	Files Complete
Self Screening Questionnaire	Personal Skills Assessments	Research	Assign Homework	Additional Services	Follow Up
Resume	Review Assessment Results	Resources	Update database	Follow Up	Participant survey
Suppliers	Discuss Career Options	Decision Making		Update database	Training
Participant Set Up	Assign Homework	Assign Homework			Resource Knowledge
Facility Tour	Record Participant data and attach assessment results	Record three occupations and other			Participant Interactions

PROCESS					
WorkKeys Assessments					Record Management
Participant Packet					
Sign Participant Agreement					
DISCOVER Orient & Set Up					
Assign Homework: DISCOVER, 5 Occupations					
Scheduling					
Coach Prep for Session 1					
DOCUMENTS					
Intake Form	Participant Packet	Assessment Results Worksheet	Decision Maker Scorecard	IDP Form	Behavioral Observation Form
Participant File: Intake Questionnaire Resume WorkKeys Scores	PSA Instructions with Log In for each participant	Exploration / Resource Worksheet	IDP Form	Portfolio Documents	Training / Workshop Checklist
Referral Source Materials: BrochureSupplier Agreement		Decision Maker Scorecard			Certificate of Completion
Career Coach Readiness Questionnaire					Intake Form
Supplier List					
Participant Packet					
Participant Agreement					

RESOURCES					
CC Manual	Flip Chart	DISCOVER	DISCOVER	Workshops	Participant File
DISCOVER	Database	Internet	Educational Websites	Additional Services	Electronic Database
Proctor	Participant Computer Stations	Employers	Job Search Techniques		Outlook
Database	WorkKeys Assessment Admin	Schools	Internet		Survey Report
Microsoft Outlook / Scheduling	PSA Website for additional information	Coach Toolkit			Assessment User Guides
WorkKeys Assessment Log In / Password	ONET Online				Toolkit
TRAINING					
DISCOVER training	PSA Training				Career Coach process as Participant
Validus training					Career Coach 2 week training
WorkKeys Proctor					Database use
PROCEDURES					
Prepares for Participants 3.01 3.02	WorkKeys Assessment Registration 4.01	Assists between sessions 5.01	Review Exploration 6.01	Finalize IDP 7.01	Behavioral Observation 9.01
Database Participant Set Up & Intake 3.03 3.04	Database updated 4.02	Guidance in Top 3 selection 5.02	IDP and Action Plan Determination 6.02 6.03 6.04 6.05 6.06	Lifelong Learning 7.02	Informational Interview Contacts 9.02

DISCOVER Password Creation, orientation and set up 3.05	Homework review and agenda introduction 4.03 4.04	Decision Maker Scorecard 5.03		Portfolio 7.03 7.04 7.05	Follow Up 9.03
PROCEDURES					
Build Foundational Skills 3.06	PSA Assessment explanation & assistance 4.05 4.06	Support Toolkit 5.04 5.05		Referral Services 7.06	
WorkKeys 3.07 3.08	Explains PSA results and actions 4.07 4.08	Teaching Information al interview 5.06		Follow Up Discussion 7.07	
Introduces Process & Packet 3.09	Assigns homework 4.09				
Participant Agreeement Background Checks 3.010	ONET and High Demand Jobs 4.010				
Schedule Meetings & Participant Exp 3.011 3.012	PSA Assessment Files 4.011				
	Observe and update database 4.012				

11.2 Procedures List

The procedures list outlines in more detail the steps the Career Coach takes in the related process step. Below is a comprehensive list compiled partially from the Final Task List developed during the WorkKeys Profile exercise.

The following are descriptions of the Procedures listed in the chart above:

3.0 PREPARATION AND ORIENTATION

3.01 Familiarizes self w/ new clients by reading individual client's Career Coaching Questionnaire, WorkKeys score report, resume, & filling in relevant info (e.g., name, address, Email) on Client Intake Form or data collection tool (Discover/SharePoint).

3.02 Prepares for new clients by meeting with others (e.g., Case Manager, HR representative) to provide description of services, obtain client's background info, and laying the groundwork for coaching opportunity.

3.03 Intake - Capture key data and provide participant details of commitment to update data and consent to supervisor and process feedback.

3.04 DISCOVER / Database – Be familiar with and able to navigate and instruct participants on the DISCOVER Career exploration and decision tool. And collect key data elements of the participant in the database for operational success and tracking of measures and outcomes.

3.05 Sets up client in Discover by logging into Discover, generating tokens (user ID, password), printing tokens, distributing tokens at session, and tracking user ID/name (on Client Intake Form).

3.06 Build Foundational Skills – When WorkKeys skills need improvement, assure systems are in place for remediation, such as KeyTrain or referral to another program.

3.07 Assessments - Full service distributor of WorkKeys and PSAs; currently take Applied Math, Locating Information, Reading for Information and Performance, Talent and Fit.

3.08 Certify NCRC – Assure participants obtained their MyWorkKeys account, activated their NCRC and obtained their certificate. Verify Certificate validity, assure participant ‘activated’ in MyWorkKeys and understands how to show employers to check the validity

3.09 Introduces the Career Coaching processes by describing the agendas for each session, sharing the goals/outcomes of each session, and listening to and answering client questions. Demonstrate the participant packet. The Career Coaching program is four highly structured sessions (Self Exploration, Career Options, Decision Making and Action) with a Career Coach in a set period of time with homework and specific outcomes.

3.010 Participant Agreement signed. (Background Checks and pre-consent drug testing, pre-employment screenings, need to determine if this is a service of a center or included in the Participant Agreement with participant)

3.011 Discusses and sets up time to meet clients by giving them the available block of time, asking each client what time works best for them, allowing them to pick a specific time, and writing time down on whiteboard or entering in Outlook.

3.012 After intake, email client with welcome and expectations

4.0 SESSION 1

4.01 Preregisters clients for PSA administrative sessions by logging into the system (administrative site), entering info (e.g., name, email), and setting up standard user name (according to protocol) and password.

4.02 Career Coach should review intake and database and assure all questions are answered and complete. If not, this information is gathered as participants arrive or prior to the end of the Session.

4.03 The Career Coach should review and ask questions regarding this homework, and determine if anyone had difficulties or needs further assistance

4.04 Manages the introduction process (1 on 1 or group) by having clients introduce themselves (e.g., current work, brief story to share), asking follow up questions, and documenting client expectations on whiteboard.

4.05 Introduces the assessment process to client groups by verbally explaining the 3 measures (i.e., Talent, Fit, Performance), asking if they are familiar with the measures, noting clients phrasing (e.g., survey vs. instrument) and answering their questions.

4.06 Explains Talent, Fit, and Performance results to clients by retrieving and printing results, helping them interpret the results of all WorkKeys assessments, and answering questions.

4.07 Discusses assessment results with client by asking client if they are ready to look at/discuss their assessments (i.e., Discover, PSA), sharing the results/scale interpretation, listening to client explain results, asking questions, & engaging the client.

4.08 Explains to clients how to record assessment results by reading the Assessment Results page to them, and telling them how to fill it out (i.e., pick 3 occupations from PSA, 3 occupations from Discover).

4.09 Instructs clients to complete homework by directing them to review PSA, asking them to think about occupations of interest, and answering their questions.

4.010 Orient participants to ONET online and high demand jobs

4.011 Career Coach or Admin must save file of PSA and attach to database.

4.012 Career Coach needs to observe and record any information that may be pertinent to success story or positive outcome for participant to discuss further in one on one session 2 - 4.

5.0 SESSION 2

5.01 Assists clients between sessions 2 and 3 by listening to them over the phone or reading email to help them with Decision Maker, O*NET, or Informational Interviews, and answering any questions they might have.

5.02 Guides clients in selecting 3 occupations to further explore w/ DMSC by assisting them in recognizing the similarities/patterns in different occupations, getting clients to think out loud, determine hidden beliefs, & observing clients write occupations on 3 Career Options Form.

5.03 Teaches clients how to fill out Decision Making Scorecard (Homework) by taking them to O*NET site, allowing them to navigate through 1 occupations, teaching them to gather data (e.g., interests, values), observing their navigating behavior, and giving them feedback.

5.04 Support Tools (ONET, Hot 50, Ladders, Forecasting, Work Orders, Schools/Programs) A comprehensive resource location with all tools necessary to assure success of Career Coach and participant.

5.05 Review and teach these job research best practices with the participant. These methods include: Informational interviews, Job Shadowing, Training and Special Projects and Volunteer Work.

5.06 Manages clients Informational Interview process by asking if they are interested in receiving names so they can conduct info interview, walking them through the Exploration Handout, & giving clients the names/phone numbers of contacts (from contacts list).

6.0 SESSION 3

6.01 Discusses the results of clients' exploration by asking what they learned [occupations that matched their values, the careers that spoke to them (i.e., outside vs. internal score) and their decision making], listening and responding to their answers.

6.02 Assists clients in determining their IDP by helping them transfer their assessment results to the IDP Form, showing them how to fill out the form and set realistic completion dates, and reviewing and signing the form.

6.03 Helps clients decide on an Action Plan (Education, Research, Job Search) by asking if they are ready for their action plan, allowing clients to pick most appropriate plan, asking for reasons they picked the plan, and listening to their responses.

6.04 Assists clients with researching educational opportunities by answering questions regarding school, and coaching them to find and navigate educational electronic resources (e.g., school websites, discover) to find descriptions of programs and contacts.

6.05 Communicates Session 3 homework to client by having client move final choice occupation to the Individual Development Plan (IDP), and instructing them to complete their action plan and be prepared to present it in Session 4.

6.06 Assist in creating at least one goal that will help them meet the plan, so that they can complete the rest for their homework.

7.0 SESSION 4

7.01 Finalizes clients action plan by listening to the clients presentation (of action plan), asking questions, giving feedback, & filling in gaps with suggestions (e.g., try a different program school based on cost/location, different organization, networking strategies).

7.02 Career Path/Lifelong learning. Assure outline for participants for career path and identify path to increase wages with ultimate outcome fit in right occupation and above median wage job.

7.03 Making sure client's portfolio is complete by instructing them to put documents (e.g., certificate of completion, NCRC, WorkKeys, Talent Fit, Resume, references and referral letters, IDP). Key output document for the participant and how to access replacements. Includes online elements in DISCOVER, access for employers to NCRC and physical packet to present at employer interviews.

7.04 Career Coach should model how to present the Career Portfolio to participant. And likewise, the participant should model their Career

Portfolio to Career Coach. The coach should provide feedback on the presentation and how they might improve.

7.05 Provide information of how to obtain educational funding, conduct a job search, give resume writing advice or provide further research ideas.

7.06 Service Referral. Understand other services available in the area outside the scope of Career Coach work and refer to as needed. If a participant needs more details and instruction refer them to in house workshops or other opportunities for success.

7.07 Educate participants on the follow up procedures of the center and ask them to sign an Opt-In form.

9.0 POST SESSION

9.01 Creates Observation score by observing client throughout the process (timeliness, attendance, and communication skills), taking notes, reviewing adequacy of their completed assignments, determining readiness for work or school, & adding score to database.

9.02 Keeps Informational Interview contacts up to date by calling contacts, asking if they are interested in being/continuing to be a resource, and updating information (e.g., phone, address) on contacts list.

9.03 Participant Follow Up/Data Upkeep. Process to assure data records are kept up to date. Provide generic phone and email and follow on requests via email for updates, etc.