Implementing Financial Coaching
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Family Services of Greater Houston
Agenda

- How coaching is different
- Client interaction
- Program evaluation and coaching
Coaching vs. Others
Training for coach

- Active listening
- Brainstorming
- Not judging
- Slowing down
- Empowerment
- Challenging ideas
Why clients come in

- Information
- Problem
- Behavioral Change
Clients carry the heavy load
No set solutions

- Client’s dictate the direction you go
Two rules

- Telling a client what to do
  - It is easy for anyone to fix the numbers.

- There is no right or wrong
  - Only do they want to make a change.
Same problem – Different problem
Timeline
Common challenges

- Mandating coaching
- Employment programs
  - Lack of money problem, not a money management problem.
- The disappearing client
- Getting fired
- Prescription problem
Program Evaluation

- How do you know if you are making a difference.
Results

- Process vs. Outcome
  - Coaching is process driven and the outcomes derives from the process

- Quality vs. Quantity
  - More difficult to hit big numbers
  - Fantastic success stories
Evaluation Tools

- Developing evaluation tools that meet the needs of the program and funders, but also is helpful to the clients.

- What Family Services does
  - Results
Questions

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