



# Implementing Financial Coaching

Richard Simonds MSW

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



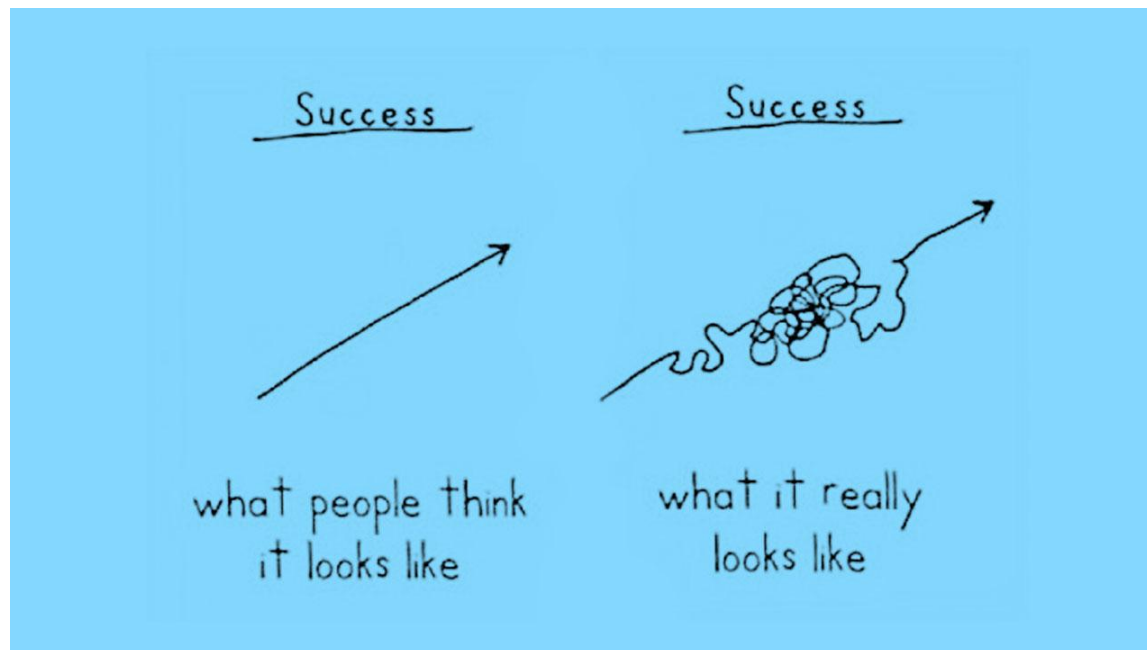
# Timeline

# 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

- Richard Simonds

Program Manager of Financial Support  
Services

Family Services of Greater Houston

[rsimonds@familyservices.org](mailto:rsimonds@familyservices.org)

(713) 867-7740