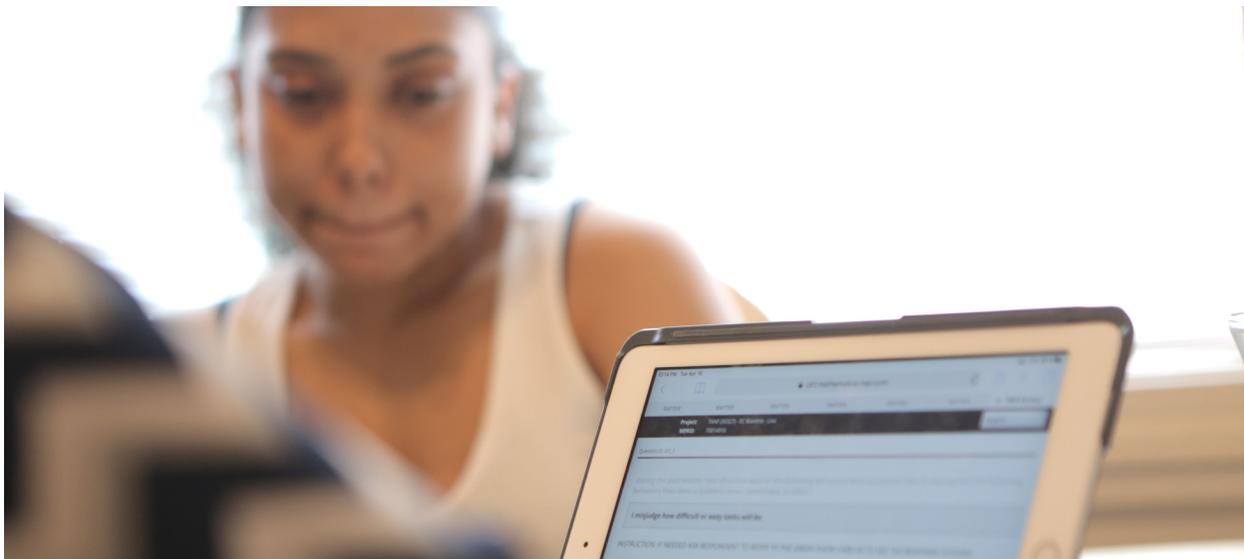## Economic mobility

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Using Coaching and Navigation to Promote Economic Mobility: How Might Programs Provide These Services Virtually?

Under its Economic Mobility and Opportunity strategy, the Bill & Melinda Gates Foundation is interested in learning about meaningful, achievable solutions to facilitate economic mobility. To that end, the foundation is exploring the promise of coaching and navigation to improve economic mobility and reduce inequities (Box 1). In June 2020, the foundation partnered with Mathematica to hold a virtual convening to discuss the potential of coaching and navigation to promote economic mobility. This convening included a diverse group of experts, including designers and implementers of coaching and navigation programs, policy experts, researchers, coaches and navigators, people who had received coaching and navigation services, and foundation staff. (For more information, see *Using Coaching and Navigation to Promote Economic Mobility: Insights from a Convening.*)

Although coaching and navigation services have traditionally been conducted mostly in person, the 2019 novel coronavirus pandemic has prompted many programs to offer these services virtually. Coaching and navigation can be provided virtually in three main ways: (1) by telephone or text; (2) by videoconference, using platforms such as Zoom, Microsoft Teams, and WebEx; and (3) over web-based platforms on which coaches or navigators and clients can share information and have short "chats."

Drawing on the discussion at the convening, this paper discusses the challenges and benefits of providing coaching and navigation services virtually, as well as considerations for virtual implementation.

Box 1. Who are coaches and navigators?

Developing a one-on-one relationship with a client, a **coach** works in collaboration with the client in setting and pursuing individualized goals for economic mobility.

A **navigator** provides information to help clients locate, identify, and take advantage of opportunities in the labor market and the many complex systems that can support economic mobility.

These terms are not always used consistently. A coach may also navigate, and a navigator may also coach. One person can do both. Both coaches and navigators can play other roles in helping people achieve economic mobility.

For more information, see *Using Coaching and Navigation to Promote Economic Mobility: What is the Evidence?* ◢

Challenges of providing coaching and navigation virtually

/ **In-person meetings might be better for facilitating communication and developing relationships.** Strong, collaborative relationships are at the heart of coaching and navigation. At the convening, people who have received coaching and navigation and practitioners said that in-person meetings are critical for developing the relationship between the client and coach or navigator. During virtual meetings, coaches or navigators and clients might not pick up on nonverbal cues. Some clients might also have difficulty finding a private place at home where they can speak with their coach or navigator over a virtual connection.

/ **Clients, coaches, and navigators might not have access to the technology needed for virtual coaching and navigation.** Clients who are seeking economic mobility might not have reliable access to the Internet. They may also not have the hardware or applications to participate in virtual coaching and navigation. Furthermore, coaches and navigators need access to the technology in the office or other places they may work.

/ **Clients, coaches, and navigators may lack digital literacy.** Clients, coaches, and navigators might not be knowledgeable about, and may be anxious about, using web-based services.

Reasons for providing coaching and navigation virtually

/ **Virtual services can be easier and less costly for clients than in-person meetings.** Convening participants—including those with experience receiving coaching and navigation services—said they appreciated the convenience of virtual meetings. Alleviating the need for clients to travel to an office saves them time, effort, and money. This is especially important for people in rural areas or in areas that do not have good public transportation, those without reliable forms of private transportation, or those with physical or mental health issues that make it difficult to travel or leave the house. Not having to pay for child care during the session also saves the client money as well as the effort and time related to finding a child care provider.

/ **Virtual services might be as effective as in-person services.** Although no rigorous research has examined the effectiveness of providing coaching and navigation on economic mobility virtually, evidence on other forms of coaching suggest virtual methods can be equally effective (Box 2).

Box 2. Comparing virtual and in-person coaching.

Studies have compared the effects of virtual and in-person psychological counseling and weight-loss coaching. For example, one study of over 100 coaches with psychology or counseling backgrounds found no differences between in-person and virtual coaching when it came to coaches' perceptions of problem-solving effectiveness or alliance between themselves and their clients. Another study compared virtual versus in-person coaching as part of a weight loss program for people with cardiovascular risk factors. It found that both groups achieved and maintained clinically significant weight loss over a two-year period. While these studies come from fields other than employment, both offer some evidence that virtual coaching may be as effective as in-person coaching. ◢

Use of interactive web-based platforms show promise

Even before the pandemic, some programs used web-based platforms (Box 3) to supplement in-person coaching and navigation. These platforms can enhance coaching and navigation by:

/ **Enabling clients to communicate frequently with coaches and navigators.** The web-based platforms often include a "chat" feature for clients to connect with their coaches and navigators. This can supplement other forms of communication.

/ **Collecting information from clients.** Clients might find it easier to provide information via a web-based platform than to remember to email or bring in a hard copy of their paperwork to their coach or navigator. For example, recipients of public assistance in Larimer County, Colorado, can document their reportable work activities in a web-based platform.

/ **Storing useful information.** Coaches and navigators can post on the platforms general information that clients may need, such as schedules, class and other event information, or information on support services.

Box 3. Two web-based platforms

PimaConnect enables students at Pima Community College to request tutoring, career planning, and other supports, such as help with study and test-taking habits and time and stress management. Students can also access their student progression plans. They can chat with their navigators and request telephone meetings through the platform.

TuaPath supplements in-person coaching within the Larimer County Works Program in Colorado. Clients can enter in the system data and upload documents about their progress in meeting their work requirements rather than keeping track of hard-copy paperwork and submitting reports in person at program offices. Clients can also record their goals and document specific action steps in the platform, and communicate with their coaches using the platform. According to a 2018 assessment, TuaPath use improved and increased overall communication between coaches and clients and reduced program costs. ◢

/ **Documenting client goals and progress toward goals.** Clients, coaches, and navigators can enter information into the platform about goals and achievements. Clients might find it motivating to see their information displayed on a computer.

Considerations for implementing virtual coaching and navigation

Program leaders, coaches, and navigators at the convening said that even after the pandemic, they will likely supplement in-person coaching and navigation with virtual services. In implementing virtual coaching and navigation, programs might want to take these steps:

/ **Use videoconferencing for meetings when possible.** Though meeting in person can help to establish relationships, people who had received coaching or navigation said that not all meetings need be in person to sustain relationships. In particular, clients might prefer videoconferencing that allows face-to-face interaction, over telephone or text. For example, during the pandemic, coaches with LIFT—an organization that works with parents seeking economic mobility—are conducting videoconference meetings over Zoom and Microsoft Teams with clients who can use and want to use those platforms. They also have conducted coaching via telephone and texting.

/ **Ensure that clients, coaches, and navigators have reliable access to the Internet and the necessary hardware and applications.** If using videoconferencing or other web-based platforms, programs must ensure their clients, as well as coaches and navigators, have reliable Internet access; access to a desktop computer, laptop, tablet, or smartphone; and the necessary applications.

/ **Offer training and technical support on using web-based systems.** Program staff at the convening said that some clients who were initially reluctant to engage with virtual coaching and navigation because of discomfort with technology were using these services comfortably once they received training. At LIFT, coaches have instructed their clients on using videoconferencing technologies and have spent time practicing

with their clients. This has also benefitted parents in understanding their children's use of the technology for schoolwork. Likewise, coaches and navigators at Pima Community College have helped students learn how to use PimaConnect, a virtual platform that links students with coaches and navigators and other supports (Box 3).

/ **Consider meeting in person at the beginning of the relationship and then move to virtual meetings.** Convening participants who had received coaching and navigation stated that although in-person meetings at the beginning of a relationship were important, they were less important over time. At some point, the convenience of virtual meetings offset any negative effects on the coach–client relationship.

/ **Consider holding virtual meetings more frequently than in-person meetings would typically be held.** Recognizing that maintaining strong relationships can be harder when meeting virtually, some convening participants suggested meeting more frequently when meetings are not in person. Before the pandemic, coaches and clients with LIFT met at the office about once a month, but coaches said they are now speaking with most of their clients several times a month. Texting frequently can also help to maintain relationships.

Call to action

Stakeholders can consider taking the following actions when funding, designing, implementing, and researching virtual coaching and navigation services:

Possible actions

Funders	Policymakers	Practitioners	Researchers
• Help organizations customize technologies to needs of clients and programs—for example, fund development of virtual platforms if appropriate • For any funded programs, allow flexibility in delivering both virtual and in-person services to clients • Provide Internet access, hardware, and applications to clients, coaches, or navigators who do not have access and provide web-based platforms to programs without them • Invest in communities to develop or seek access to broadband and other technologies	• Remove any policies that prevent virtual service provision in publicly funded programs • Allow for greater flexibility in spending funds so that publicly funded programs can provide Internet access, hardware, and applications to clients • Help to improve systems and platforms for publicly funded programs to facilitate virtual coaching and navigation	• Experiment with technology and tailor venues to what clients find useful • Develop complementary in-person and virtual services (such as standing in-person meetings combined with informal text or phone check-ins) • Train clients, coaches, and navigators on how to use technologies • Help clients get Internet access, hardware, and applications • Explore using web-based platforms	• Explore clients' and practitioners' perspectives on virtual coaching and navigation services • Study combinations of in-person and virtual coaching and navigation on client outcomes, as well as relationship quality and costs • Study effects on clients of providing Internet access, hardware, and applications to clients and effects from the use of virtual platforms