

Coaching Network Policy Manual

Level Up Indiana: Employment Specialist Initiative

PCG

June 2022

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LEVEL UP Indiana

Employment Specialist Initiative

OVERVIEW

Level Up Indiana: Employment Specialist Initiative (ESI) is the VR sponsored statewide initiative to strengthen Indiana's employment specialists and improve vocational rehabilitation service delivery. Level Up Indiana: ESI is a Public Consulting Group (PCG) project funded by Indiana Vocational Rehabilitation.

PURPOSE

The purpose of the Coaching Network is to shape new leaders and to strengthen Indiana's employment specialist workforce. This network can provide coaches with in-depth experience including, but not limited to, the following areas: discovery, working with individuals who are blind or visually impaired, benefits counseling, ticket-to-work program, VR processes and administrative paperwork, working with case managers, behaviorists, and clients' teams, mental health conditions, employer engagement and outreach, job placement, ongoing support, and more.

For those who are newer to the employment specialist field, the Level Up Indiana: ESI Coaching Network is a **learning opportunity** where we connect seasoned employment staff with support learners who are refining their skills.

For seasoned employment staff who are prepared to leverage their skills and help advance their peers, the Coaching Network is a **leadership opportunity** and a **financial opportunity**.

Overall, the Coaching Network offers all employment specialists the chance to collaborate and learn from leaders in the field. This kind of **networking and peer learning** offers a way to scaffold and strengthen internal practices, coaching, and supervision practices throughout the state.

Benefits for Coaches and their Employers:

- Additional funding stream
- Creates opportunities for providers to increase compensation for valued staff
- New leadership opportunity
- Training and support on coaching best practices
- Participating providers will be featured as partners in the coaching network

Benefits for Learners and their Employers:

- Learn from successful leaders doing the work
- Enhance Learner expertise
- Strengthen employment team
- Scaffold internal coaching and supervision practices
- Work toward becoming a coach

HOW DOES IT WORK?

The Coaching Network is organized and managed by Public Consulting Group (PCG) in collaboration with Knowledge Services. PCG recruits, screens, and onboards coaches throughout Indiana to provide coaching services. Knowledge services provides administrative and logistics support. On an ongoing basis, PCG will provide training, resources and technical assistance to both coaches and learners to support effective, quality coaching.

Coaches will identify their subject matter expertise based on the [APSE Universal Employment Competencies](#).

PCG staff will review the results of the Learner's pre-coaching screening and **match the Learner to a coach** based on key target areas.

During coaching sessions, the Coach will **record observations, coaching, and progress** using tools based on the APSE Universal Employment Competencies. This will be shared with the Learner and their supervisor as a feedback mechanism for the **supervisor learning how to provide effective supports**.

WHO CAN APPLY?

Those interested in being a Coach, can always find the requirements and application process online at <https://invrtraining.com/coachingnetwork>.

To be a coach within our Coaching Network, you must meet certain criteria:

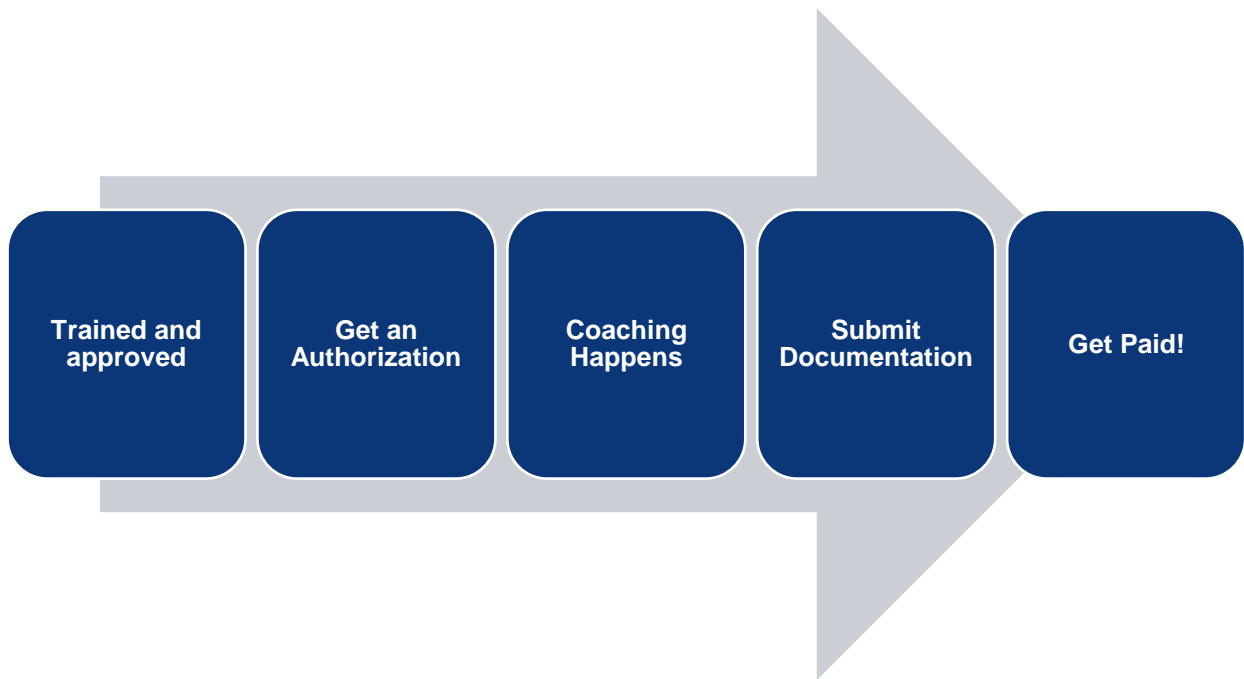
1. Coaches must meet **one** of the following requirements:
 - a. [Certified Employment Support Professional™ \(CESP\)](#) and three years of experience in employment services
 - b. At least five years of experience in employment services
 - c. At least five years of experience in the subject matter they wish to coach on (if that subject is not employment services)
2. Coaches must have **at least one year of experience** successfully providing mentoring, coaching, or guidance
3. Produce **proof of experience**, including three examples demonstrating their experience in areas they wish to coach
4. Provide a **letter of support** from employer
5. Provide **two professional references**

APPLICATION PROCESS

Applicants should complete the application linked below. Once submitted, applications are automatically emailed to our Level Up Indiana: ESI team for review. Someone will reach out to the applicant within 2-3 business days to collect further **supporting documentation** and to inform them on next steps in the process.

[Download our Coaching Network Application instructions to review all the requirements of the coaching role and to learn more about the application process.](#)

The following sections review the coaching process, as outlined in the graphic below.



APPLICATION REVIEW & APPROVAL

REVIEW

PCG will review all submitted documentation in a timely manner. All requirements must be met for an applicant to be approved as a Coach. PCG has a standard approval process that is gone through for each applicant.

NEXT STEPS

PCG will contact the applicant to let them know if we require more documentation, if applicant does not meet the requirements, or if they have been accepted as a coach. We welcome feedback and questions from the applicant if they feel their application was not approved in error.

Knowledge Services is a PCG subcontractor who is responsible for contracting with coaches' agencies and providing coaching payments. Once the applicant is approved as a Coach, Knowledge Services will be notified. They will initiate a contract with the organization to deliver coaching at agreed upon rates and services. In the case there are multiple coaches at the same agency, Knowledge Services may structure a contract with multiple coaches.

PCG will reach out to the Coach once the Coach's agency has signed and submitted all of the appropriate paperwork. Then PCG will set up a convenient time for a virtual orientation—discussed in the next section.

ORIENTATION

PCG will contact the new Coach and set up a virtual orientation to the coaching network after the contract has been approved by Knowledge Services. Coaches will receive onboarding and training on:

- Best practices in coaching,
- using the developed coaching tools and resources,
- logistics and process,
- and expectations on communication.

PCG and Knowledge Services have coordinated to develop a system of authorizations and assignments. These authorizations are used to authorize for services and be connected to the capacity to invoice Knowledge Services.

AUTHORIZATION

WHAT DOES AN AUTHORIZATION MEAN?

The Coach will receive one or more authorizations after a Coach has been approved and been through the orientation process

General Authorization


The purpose of this authorization is to utilize the hours for administrative purposes. These hours may include your time during a Coaches Check In (described in the next section), time spent completing billing documentation, or setting up time with Learners.

Coaching Authorization

This authorization form:

- Identifies Learner, Coach, contact information, and services to be delivered.
- Coach, Learner, and respective supervisors will receive copies.

An example of an authorization is below.



Coaching Network Authorization

The coach's employer will submit invoice and supporting documentation to PCG at INVRTrainingandTA@pcgus.com. PCG will notify Knowledge Services of approved amount based on services delivered, as allowable in the authorization and according to the contract. Knowledge Services will send payment to coach's employer. ***The coach's employer will remit payment to the coach based on the organization's business practices.***

Authorization #	55	Time Period	9/1/21-11/30/21
Coach Name	Lea Vincent	Learner Name	Alexander Hamilton
Coach Email	lvincent@pcgus.com	Learner Email	alex@gmail.com
Coach Phone	785-430-4112	Learner Phone	555-555-5555
Coach Agency	Lea's Employment Agency	Learner Agency	Rise Up Employment
Supervisor Email	macox@pcgus.com	Supervisor Email	ben@gmail.com

Service	Hours	Rate	Total Available
Job Shadow	6	\$21.00	\$126.00
Hourly Coaching	6	\$63.00	\$378.00
Total Authorized Amount			\$504.00

Goal: Improve quality of ESRP's and figuring out what kinds of support(s) are needed for participants with Supported Employment hourly.

Notes: Alex and his supervisor indicated as a new ES, he's still learning how to support people in the workplace. They do not have anyone at their agency who is really good at this. Alex has struggled the most with individuals who do not use verbal communication.

LEARNER PROCEDURES

Learners enrolled in sessions of the ACRE training will be automatically enrolled in the coaching network. Learners may also seek services through the Level Up Indiana: ESI training website.

COACHING DELIVERY

The Learner will complete a **pre-coaching screening** in Qualtrics, a survey platform, to determine coaching priorities after enrollment. This screening will be based on [APSE Universal Employment Competencies](#) and reflect both perceived strengths as well as quantitative outcomes. The Learner will be encouraged to work with their supervisor to determine needs.

PCG staff will review the results of the learner's pre-coaching screening and **match the Learner to a Coach** based on key target areas. The Coach and Learner will receive an **authorization** for

coaching services to be delivered once a match is made. At that time, the Coach and Learner may schedule coaching within the authorized time frame, for what makes sense between the two of them.

During coaching sessions, the Coach will **record observations, coaching, and progress** using tools based on the APSE Universal Employment Competencies. This will be shared with the Learner and their supervisor as a feedback mechanism and loop to support the **supervisor learning how to provide effective supports**.

Throughout the coaching process, PCG recommends data collection to monitor the efficacy of the network, make improvements on an ongoing basis, and measure impact on service delivery. Technical assistance will be offered on an on-going basis based on the needs of learners.

COACHES' CHECK INS

PCG holds a monthly virtual call with coaches via MS Teams. This is a 30-minute call with an opportunity to visit with other coaches, present challenges, assist another Coach, to share best practices, or for PCG to share valuable information. PCG will send calendar invites to coaches. Coaches are allowed to use their general authorization hours to bill for this call. The call is held on the third Friday of each month from 9 am until 9:30 am Eastern. Coaches are not required to attend every meeting; although, it is encouraged if possible.

BILLING RATES

The 'Billing Unit' definition is taken from the ¹VR Manual of Employment Services.

"Billable time for hourly services should be tracked for each participant. The invoice must provide a breakdown of total hours billed. The total number of minutes billed shall be added, and any fraction of the total that is 15 minutes or more may be rounded up to the nearest one-half hour total."

The table below provides an example.

SERVICE	MINUTES	TOTAL # HOURS & MINUTES	TOTAL # HOURS & MINUTES (ROUNDED)	TOTAL UNITS BILLED (ROUNDED)
Direct coaching	78:00	1.18	1:30	1.50

HOURLY SERVICES

Administration & Direct Coaching Rates

Coaches will bill administration and direct coaching hours at a rate of **\$63.00 per hour** in accordance with the billable unit as described above. This rate is subject to change throughout the life of the Coaching Network.

¹ <https://www.in.gov/fssa/ddrs/files/VR-Manual-of-Employment-Services-February-2019.pdf>

Job Shadowing Rates

Coaches will bill job shadowing hours at a rate of **\$21.00 per hour** in accordance with the billable until as described above. This rate is subject to change throughout the life of the Coaching Network.

TRAVEL COSTS

Mileage and other travel costs may be reimbursed but must be preapproved by PCG before the costs are incurred. The below sections will go into more detail.

Mileage

Mileage will be reimbursed at the current state mileage rate for all services outside of a Coach's community. Mileage reimbursement will be made following the ²Indiana Department of Administration travel circular.

Meals and Other Costs Incurred

If a Coach is involved in onsite, small-group coaching, they may incur additional costs throughout the day. Additional costs may include meals, parking, or toll fees. Receipts and documentation on invoices must be provided if a Coach is seeking reimbursement for these costs.

Here is just one example of how participating in the Coaching Network could provide additional financial support:

Authorization Number	Service	Rate	Unit	Total
55	Hourly Shadowing	\$21.00	5.00	\$105.00
55	Hourly Coaching	\$63.00	4.00	\$252.00
51	Hourly Group Coaching (6 people)	\$63.00	36	\$2,268.00
50	Admin Hours	\$63.00	1.50	\$94.50
na	Mileage	\$0.39	60.00	\$23.40
				\$0.00
				\$0.00
				\$0.00
TOTAL				\$2,742.90

MONTHLY BILLING

There are 12 months in the Level Up Indiana: ESI's billing cycle. Billing will be completed monthly in accordance with the sections below.

² The Indiana Department of Administration reviews mileage rates quarterly. Current mileage rate is posted at: <http://www.in.gov/idoa/2459.htm>

PROCESS

The Coach's employer will submit invoice and supporting documentation to PCG at INVRTrainingandTA@pcgus.com no later than the 10th of the month for the previous billing cycle. (June billing will be requested sooner due to 'end of the year' practices.) PCG will notify Knowledge Services of approved amount based on services delivered, as allowable in the authorization and according to the contract. Knowledge Services will send payment to the Coach's employer. ***The Coach's employer will remit payment to the Coach based on the organization's business practices.***

The next sections include the required documents and examples of supporting documents.

Required Documents

The following documents are required each month to be submitted with billing package according to the process laid out above.

- Copy of the appropriate authorizations(s)
- Monthly progress notes for each Learner
- Additional receipts as needed
- Monthly invoice

Below is an example of a monthly invoice.



Coaching Network Invoice

The coach's employer will invoice Public Consulting Group (PCG) based on services delivered allowable in the authorization and according to the contract. The coach's employer will re-payment to the coach based on the organization's business practices.

Agency	Lea's Employment Services
Coach Name	Lea Vincent
Agency Email	lvincent@pcgus.com
Agency Phone	785-430-4112
Time Period	9/1/2021-9/30/2021
Date Submitted	10/9/2021

Authorization Number	Service	Rate	Unit	Total
55	Hourly Shadowing	\$21.00	5.00	\$105.00
55	Hourly Coaching	\$63.00	4.00	\$252.00
na	Mileage	\$0.39	150.00	\$58.50
na	Parking	\$10.00	1.00	\$10.00
na	Toll	\$5.00	1.00	\$5.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
TOTAL				\$430.50

Below is an example of a monthly progress report.



Coaching Network Monthly Progress Summary

Services and notes should be completed after each session to the learner and the supervisor. Within 10 days of the end of the month, or upon completion of coaching, documentation will be submitted in conjunction with the invoice.

Authorization #	55	Time Period	9/1/21-9/30/21
Coach Name	Lea Vincent	Learner Name	Alexander Hamilton
Coach Email	lvincent@pcgus.com	Learner Email	alex@gmail.com
Coach Phone	785-430-4112	Learner Phone	555-555-5555
Coach Agency	Lea's Employment Services	Learner Agency	Rise Up Employment
Coach Sup email	macox@pcgus.com	Learner Sup email	ben@gmail.com

Date Submitted to PCG: 10/9/21

Service	Units	Date	Topic	Feedback	Progress	What are your next steps and why?
Shadow Experience	1	12/8/2020	ESRP/SE	n/a	Case for LyLam was reviewed. Coach completed ESRP during session, referring to Discovery profile.	Alex has a new placement. We have scheduled time to look through Discovery profile, talk about the job, and develop a plan and ESRP for the case so he can apply what he has learned.
Hourly Coaching	2	12/12/2020	ESRP/SE	We talked about using the strategies you have seen effective, and applying them to SE.	Alex's case, AnChan, has a new job at Gray Realty. We reviewed AnChan's DP, job duties, and what Alex anticipates as important. ESRP was completed.	Alex and coach will meet in 2 weeks to see how things are going, and if the ESRP and plan make sense.

COACHES' LIBRARY OF RESOURCES

The purpose of this is to provide a library of resources is for our Level Up Indiana Coaches. There are video links on the page for coaches to learn more about Discovery, Job Development, and Leadership and Alignment. We encourage coaches to send us other resources that they think would be helpful to the coaching network. Please send them to INVRTrainingandTA@pcgus.com for review.

To utilize the library of resources:

1. Go to the Level Up Indiana website: <https://invrtraining.com/>
2. Click on the header 'Resources'
3. Click on 'Coaches Library'
4. Enter the password: library3421

COACHING EVALUATION

PCG has developed a coaching evaluation that will be sent to Learners at completion of their coaching. PCG will run regular reports and share the results with the individual coaches. Coaches should let PCG know once coaching is complete with each Learner assigned to them via invrtrainingandta@pcgus.com.

NEED HELP?

Please reach out to the Level Up Indiana team with any questions, challenges, or feedback you may have. You can email us at INVRTrainingandTA@pcgus.com whenever you need assistance!

Thank you for sharing your leadership skills and experience with others!