Standard Procedures

Updated: 4/12/24

Introduction

These procedures are intended to consistently result in high-quality and professional services to clients. The objectives are:

- Bootstrap from our pioneering volunteers to a larger group of coaches
- Create a structured approach to onboard trainees to become coaches
- Provide oversight and feedback that supports continuous improvement of each coach
- Measure coaching effectiveness, overall and of individual coaches.

Components

The components of the Standard Procedures are described in Table 1 below. Some are required while others are optional or aspirational. They are listed in the order they should be completed.

Table 1: Components

Component	Description
Steps for becoming a Volunteer Coach REQUIRED	Aspiring coaches complete all steps listed in the Guide to Becoming a Volunteer Coach.
Outside party Introductory Training ASPIRATIONAL	GoEAZ may offer or recommend introductory training classes offered by outside parties
Mentored Practical Experience REQUIRED	A new coach begins coaching with guidance from an assigned Mentor who reviews key communications with the client. Mentoring continues until the coach completes at least one engagement through step 5 (follow-up to initial meeting) of the Engagement Process.
Peer Review OPTIONAL	A coach can use informal discussions or a scheduled meeting to review one or more engagements. Reviews benefit both the presenting coach and the reviewers.
Assessment ASPIRATIONAL	In addition to the required Coaching Skills Self-Assessment, which should be periodically updated by all coaches, assessment may include: ● Internal reporting on engagements ● Client satisfaction surveys
Advanced Training ASPIRATIONAL	This may include training materials and/or courses on modeling tools and specific technologies (e.g. ASHP, HPWH, etc.). Such training may be offered by GoEAZ or other parties.

Coach Review Panel

GoEAZ will designate a Coach Review Panel (CRP) that will administer the Onboarding Process described below. This panel will have at least three (3) members who have completed the Onboarding Process. Membership on the panel will be established by majority vote of the members in attendance at a GoEAZ meeting. The number of panel members may grow over time. Procedures for rotating membership of this panel may be established in the future. These responsibilities are assigned to a panel rather than the entire GoEAZ team to enable faster scaling of the coaching service.

Initial Panel Members: We are starting with a handful of volunteers with varying amounts of knowledge and experience, and no established Onboarding Process. To bootstrap our Onboarding Process, the group will appoint by vote at least three members of the panel.

Onboarding Process

This process is administered by the CRP. It provides a degree of assurance that a new coach has a basic understanding of the coaching model, heat pump technology, coaching collateral, and continuous improvement process.

The onboarding steps are:
1. The Applicant completes the Steps for Becoming a Volunteer Coach, including submission of a Coaching Application.
2. The CRP lead distributes the documents to the CRP
3. The CRP reviews and approves the submitted documents (or requests revisions) and assigns a Mentor. The Mentor must be a member of the CRP or be a GoEAZ member who has completed the Onboarding Process.
4. The new Coach begins their Mentored Practical Experience in which s/he completes at least one coaching engagement through step 5 of the Engagement Process, keeping the mentor apprised of client communications in each engagement.
5. After completing the Mentored Practical Experience component, the Coach provides the CRP with artifacts related to the substantive engagement(s). The minimum required artifacts are the homeowner questionnaire and the coach's written follow-up to the initial meeting.
6. The CRP reviews the artifacts and approves the Coach to continue independently or recommends extending the Mentored Practical Experience.