Economic mobility
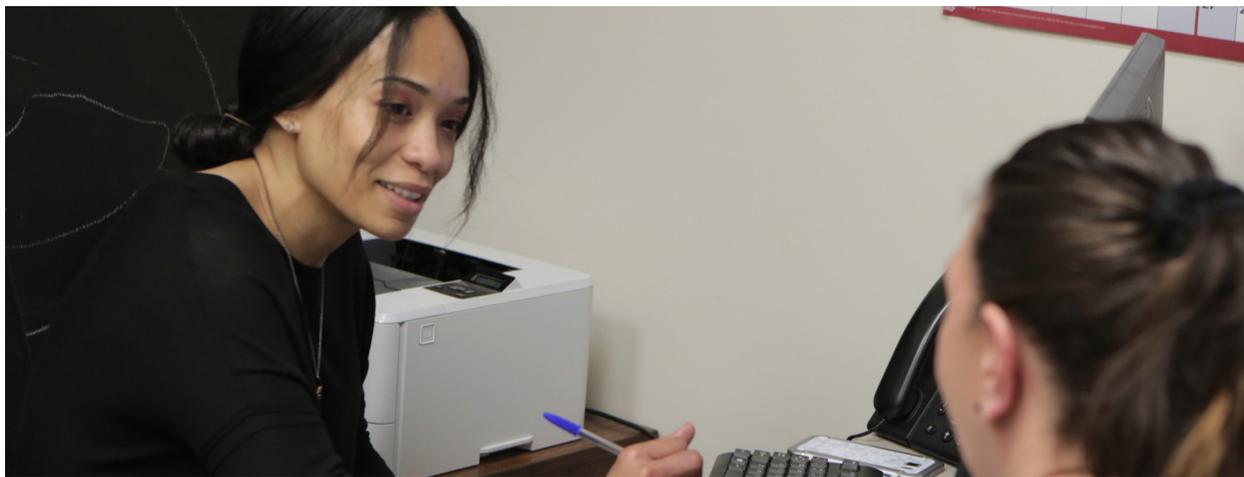
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Using Coaching and Navigation to Promote Economic Mobility: How Can Programs Ensure Equity?

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. In June 2020, the foundation partnered with Mathematica to hold a virtual convening on 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.

During the convening, experts agreed that coaching and navigation can help address some of the challenges of economic mobility. (For more information, see *Using Coaching and Navigation to Promote Economic Mobility: Insights from a Convening.*) Economic mobility requires knowledge of available opportunities—jobs, education, and training—and transportation, child care, physical and mental health services, and other supports that enable people to take advantage of those opportunities. Education, training, and support services are available but in complex, fragmented, and siloed systems. Accessing these opportunities and supports can be burdensome, difficult, and time consuming, and can be especially challenging for people who also face the stressors of poverty and the oppression of structural racism. At the same time, people seeking economic mobility bring skills, experiences, knowledge, and other strengths. Coaching and navigation are designed to help people capitalize on those strengths. For these reasons, there has been increasing interest in coaching and navigation—approaches that involve working directly with people to help them develop skills, find jobs, move up a career ladder, manage their finances more effectively, and identify and access supports to facilitate economic mobility (Box 1).

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?* ◂

Convening participants noted that coaching and navigation could be important approaches to promote equitable economic mobility but cautioned that providing these services equitably requires close attention. This paper discusses the insights from the convening about promoting equity in coaching and navigation.

Increase accessibility

Coaching and navigation services should be as accessible as possible to those who need them. Suggestions for ensuring accessibility include:

/ **Provide coaching and navigation in places that are easily accessible to clients.** Programs might consider offering services in places that are familiar to and nearby to their clients. For example, many community colleges, such as Pima Community College, provide navigation services on campus to help students find and apply for programs that they can benefit from. LIFT, a coaching program for parents and caregivers of young children, provides services in preschool and child care centers that are easily accessible to its clients. Other programs offer coaching and navigation in clients' homes.

/ **Reduce the time, effort, and cost involved in meeting with a coach or navigator.** This assistance may involve reducing the complexity of the application procedures, paying for transportation, providing or paying for child care, and making accommodations for people with disabilities.

/ **Match the frequency and location of coaching and navigation to the client's preferences.** Depending on their circumstances, clients may prefer frequent, short meetings or longer, less frequent meetings. They may prefer to meet in the program office, their home, or other community locations. Matching the service provisions to the client's preferences increases the likelihood of providing the services equitably.

/ **Provide some coaching and navigation remotely.** Convening participants who had received coaching and navigation services said that receiving coaching by telephone, videoconference, or through a web-based platform saved them the time and money involved in transportation and finding child care. However, for virtual coaching and navigation to be provided equitably, clients need access to the Internet, the appropriate hardware and software, and training on how to connect to coaches and navigators virtually. (See *Using Coaching and Navigation to Promote Economic Mobility: How Might Programs Provide These Services Virtually?*)

/ **Make program environments welcoming.** Coaching and navigation programs should be welcoming to everyone. Programs should consider the approachability and warmth of the physical space. Displays in the offices and content in program brochures should reflect the diversity of clients served. Staff interacting with clients or potential clients should be respectful.

Increase coach and navigator diversity

In selecting coaches and navigators and other program staff, programs should consider candidates' backgrounds and lived experiences. Suggestions include:

/ **Pay attention to the diversity of all program staff.** In the private sector, growing evidence indicates that having diverse leadership and staff is linked to better financial performance. In the public and nonprofit sectors, programs might also see benefits from having a diverse staff at all levels.

/ **Consider hiring coaches and navigators with backgrounds or experiences similar to those of the clientele.** Programs might seek to match clients with coaches and navigators who have similar backgrounds or lived experiences. Other programs might want to hire people who have received coaching or navigation or faced similar challenges to the clients. Programs could also offer opportunities to train and potentially employ interested clients to provide coaching or navigation.

Address biases and train on cultural competency

Racism and other biases can be explicit or implicit. Implicit biases are the unconscious attitudes or stereotypes we all have about groups of people. Biases held by coaches and navigators can be detrimental for some clients. Cultural competency is understanding and effectively interacting with people from other cultures. Suggestions for addressing biases and promoting cultural competency include:

/ **Do not tolerate racism or other biases.** Programs must make clear to their employees that racism and other biases are not tolerated.

/ **Ensure that coaches and navigators respect clients' autonomy, goals, and preferences.** Implicit biases are less likely to be detrimental if coaches and navigators are trained to allow the client to take the lead. For example, they should avoid steering clients into any particular career path but instead provide information so that clients select their own paths.

/ **Incorporate trauma-informed approaches.** Clients seeking economic mobility might have experienced or be experiencing trauma. Trauma-informed approaches that account for trauma can help clients feel safe and respected and can foster positive working relationships between clients and their coaches and navigators. Programs can offer training to staff on trauma-informed approaches and care.

/ **Train on implicit biases.** Implicit bias training may help people become aware of their biases and take steps to reduce or eliminate those biases. Coaches and navigators can become aware of their implicit biases and change their behavior accordingly through training and professional development.

/ **Train on cultural competency.** Coaches and navigators can also receive cultural competency training. This type of training aims to raise awareness of people's cultural worldviews and attitudes toward cultural differences, share knowledge of different cultural practices and worldviews, and enhance cross-cultural skills. This may especially important when the coaches and navigators do not have the same background as their clients.

Listen to clients' voices

Coaching and navigator program developers and practitioners should strive to incorporate client voices when developing and implementing coaching and navigation approaches. Doing so can help ensure that coaching and navigation approaches fit what clients and their broader communities need and want. Box 2 lists some approaches to including client voice.

Box 2. How to include client voice when designing programs and services.

Programs and funders can recruit clients onto committees, teams, or working groups that have decision-making power and use participatory strategies to collect input. The University of Kansas offers a toolkit on how to engage community stakeholders, including clients, in program design and planning. ◢

Call to action

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

Possible actions

Funders	Policymakers	Practitioners	Researchers
• Give funding priority to organizations that are seeking to advance equity in coaching and navigation	• Install hiring policies at public agencies using coaching and navigation approaches to encourage the hiring of diverse coaches and navigators	• Ensure equitable access to coaching and navigation for all clients • Hire coaches and navigators with backgrounds and lived experiences that are similar to those of their clients • Train staff on implicit bias and cultural competency • Assess internal data to ensure clients are receiving services tailored to their goals and preferences	• Collect more information about challenges related to equity—talk to clients about their experiences, both positive and negative • Better understand why some clients disengage from coaching and navigation • Assess the outcomes and impacts of different coaching approaches by client subgroup