Project 1  : Improve Outcomes

* Can we get access to the programs you use to gather data?

FECBOT is a secured Salesforce but I can walk you through it and show/download any data you would like to see.

* Who has bank accounts and who doesn't?

I don’t think I have a way of seeing who has bank accounts. The outcomes are showing me how many people had a banking outcome, depending on if that is what they set up as a necessary requirement.

* What kind of data can FEC provide for us to move forward in our research to give us an idea what to ask for?

This depends on what you are looking to do. The data is set based on what happened in a session. I can go through the Salesforce system FECBOT with you and download/send any data you’d like.

In the deliverable, it might be best to think about what strategies a counselor can take in delivering a plan to get better banking outcomes.

* Can you elaborate on how counselors deliver their programs? How do they get participants to become involved and what's the duration/how many sessions do they have for specific needs like establishing a bank account, building credit or having a good savings plan?

Counselors meet with their clients virtually or in person for 45 minutes or longer. It can take as little as 2 sessions to begin to log an achievement or outcome, but the recommended amount is 5 sessions. I have attached slides with more detailed information on the FEC program.

* What tools and resources do they currently use to deliver programs and evaluate their clients?

Counselors currently use FECBOT to collect data. The data they receive comes from pulling their credit score, evaluating their bank accounts and creating budget plans to achieve their goals.

Other resources they use are community resources (programs that can help clients achieve their goals) and virtual tools if clients can’t meet in person. We are exploring using IRIS to help us receive referrals, make referrals and document information about our cases, but we can’t include sensitive information, just general info about how successful the referral was.