



SPONSORSHIP



Transition Coordinator Toolkit

Welcome to the ETS Sponsorship Program (ETS-SP)! We are happy to have you join our team!

Transition Coordinators are the first people our newly enrolled service members/Veterans speak to about our ETS Sponsorship Program! We appreciate your willingness to welcome our transitioning service members/Veterans to our program with care and empathy.

This toolkit provides an overview of our program as well as the specific role of our transition coordinators. If you have any questions about any of the material presented, please contact us at ETS-SP National or reach out to your ETS-SP Community Integration Coordinator.

Again, thank you for your time and willingness to serve as our program ambassadors. We look forward to moving forward with you!

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I. Overview

When a service member/Veteran enrolls in the ETS Sponsorship Program (ETS-SP), ETS-SP National assigns the service member to an ETS-SP Transition Coordinator (TC). The TC utilizes a Transition Coordinator dashboard. The dashboard provides the TC with the service member demographic information, including personal information, military service time and transition details that highlight the domain areas that are important as noted by the service member/Veteran.

After enrollment, the TC makes the first contact with the service member/Veteran. The TC emails or uses the service member/Veteran's preferred method of communication to coordinate an appointment to conduct an intake phone call.

The purpose of this initial intake phone call is to discuss and expand upon the service member's needs and concerns on the five domains. This information is found on the enrollment form previously submitted by the service member/Veteran at the ETS-SP website.

Upon completion of the intake process, the transitioning service member/Veteran file is assigned to the appropriate Community Integration Coordinator (CIC). Within 7-14 days after the intake is complete, the CIC matches the transitioning service member with a sponsor. Together, the service member/Veteran and sponsor begin their journey together.

After matching, the TC will remain a participant in the sponsor/service member/Veteran journey. The TC will send follow-up emails to all assigned service members/Veterans during the second week of each month. After each follow-up, the TC notes the outcome of each follow-up and saves the notes to the service member/Veteran's file on the dashboard. If a service member/Veteran's communication with the TC causes any level of concern about their well-being, the TC will contact ETS National.

II. Responsibilities

The Transition Coordinator (TC) serves as the welcome ambassador for the ETS Sponsorship Program to the newly enrolled service member. They are the first line of communication with the service member/Veteran; they set the building blocks to create a trusting working relationship with them.

The TC responsibilities follow:

Transition Coordinator
<ul style="list-style-type: none">● Be caring, friendly, and enthusiastic in your contact with service members/Veterans. A personable approach and warm demeanor are crucial to the cultivation of rapport and establishment of a service member's comfort within our organization.● Communicate in a timely and professional manner with both service members/Veterans, ETS National and the Community Integration Coordinators (CICs) IAW the steps noted in Section III, Processes.● Schedule an intake telephone appointment with the service member/Veteran to review enrollment information as well as discuss the service member/Veteran's pressing concerns and needs as he or she approaches his or her ETS.● Understand and utilize the dashboards effectively.● Send bi-monthly follow-up emails with assigned service members/Veterans.● Answer any questions or concerns that the service member/Veteran may have. You do not have to know the answer to every question--just know where to find the answer!

III. Processes

The role of the Transition Coordinator (TC), including the timeline and duties involved, are discussed below.

Important:

The TC should contact the TC supervisor or identified ETS-SP National POC with any concerns, questions or issues. The TC will share questions raised by the service member/Veteran at the weekly TC meeting.

Should there be an explicit indication of high risk, the TC should contact the identified ETS-SP National POC immediately. See Indicators of Concern Section IV, Resources (G).

A. Pre-Intake

Service member/Veteran Assignment

When a service member/Veteran enrolls online, ETS National will assign the service member/Veteran to a TC through the ETS-SP dashboard. The TC utilizes a Transition Coordinator dashboard. The dashboard is a communication tool and provides the TC with the service member/Veteran demographic and enrollment information. The dashboard gives the TC access to the service member/Veteran Enrollment Profile that the Intake Call will be based on.

The Enrollment Profile includes:

Personal information	Sponsor details
Service details	Permissions
Transition details	Terms and Conditions

Initial Contact

A service member/Veteran's preferred method of contact (typically, e-mail, text, or phone) as well as preferred time(s) will be indicated on their enrollment form. The TC will initiate an introductory communication with the service member/Veteran and will schedule a mutually agreed upon appointment time to perform the telephone intake. The intake takes approximately 30 minutes. The ETS-SP journey cannot begin until the intake is completed. The email template is located in Section IV, Resources (A).

Follow-Up Protocol

Sometimes, service members/Veterans are not quick to respond. If the service member/Veteran does not respond to the email, the TC will employ the follow-up protocol. Depending on the service member/Veteran's ETS timeline, the TC will follow timely protocol:

If the Service member's/Veteran's ETS date is 50 days or less

Follow-up #1 - If no response to initial contact within 48 hours, send follow up;

Follow-up #2 - If no response to Follow-up #1 within another 48 hours, **cold-call** the servicemember/Veteran.

If no response to Follow-up #2, this service member/Veteran is deemed unresponsive.

If the Service member's/Veteran's ETS date is greater than 50 days

Follow-up #1 - If no response to first contact within 48 hours, **send follow up**;

Follow-up #2 - If no response to Follow-up #1 within another 48 hours, **send another follow up**.

If no response to Follow-up #2, this service member/Veteran is deemed unresponsive.

'No Response' Protocol

Once all steps of the follow-up protocol have been exhausted, the unresponsive service member/Veteran file is referred to ETS National who attempts to contact the service member.

- At this point, TCs are no longer required to continuously follow up with the service member.
- If ETS National **is unable** to contact the service member/Veteran, ETS National will close the service member/Veteran's file with the stipulation that the program is available to the service member/Veteran at any time if he or she wishes to return/re-enroll.
- If ETS National **is able** to contact the service member/Veteran, he or she will be labeled a case of reestablished connection and the TC will be contacted and informed of the next steps (which may include re-attempting to schedule the intake appointment).

B. Intake Call

Opening and Greeting

The Transition Coordinator will call the service member/Veteran at the mutually agreed upon date and time requested by the service member/Veteran in their response during the Pre-Intake communication. The TC greets the service member enthusiastically and in a friendly manner.

Content and Conversation

The Transition Coordinator should review and confirm specific parts of the enrollment form or the enrollment profile on the TC dashboard with the service member/Veteran. These specific parts include:

- Name
- Contact information
- Date of birth

It is important to note that the TC does not have to go through the entire intake form. The intake form will guide the TC through the phone call--the TC does not have to memorize any of the information on the intake form. If a service member/Veteran has checked off a box on the enrollment form, simply ask the questions on the intake form listed under the box/category. The intake form on the ETS-SP dashboard will guide the TC to ask the appropriate questions.

During the intake phone call with the service member/Veteran, the TC makes appropriate annotations that might assist the sponsor. For example, if the service member says he or she has a pet giraffe, the TC will note this so the sponsor is aware. More likely, the service member may mention family members with special needs or interest in Crossfit; items of interest that would be helpful for the sponsor to know.

Closing and Final Steps

Once you have reviewed each pertinent area of the form and verified that the service member/Veteran does not have additional questions, the conversation can end. The TC should let the service member/Veteran know that ETS National will soon be in touch regarding next steps (i.e., matching with a sponsor).

The TC then refers back to the dashboard and under "Action Needed", the TC indicates the appropriate status of the file with one of the following: *Sponsor* (the service member/Veteran is ready to be matched with a sponsor) or *Needs Assistance* (the service member/Veteran's situation requires attention from ETS-SP National or the assigned CIC).

C. Monthly Follow-Up

The TC will send follow-up emails to all assigned service members/Veterans during the second week of each month. An email template is located in Section IV, Resources (D). After each follow-up phone call, the TC notes the outcome of each follow-up and saves the notes to the service member/Veteran's file on the dashboard. The follow-up responses are important in providing additional information to the sponsor and CIC and will be helpful for future meetings between the service member/Veteran and sponsor.

The follow-up includes:

- Did the service member respond? If so, what time/day?
- How is the service member/Veteran doing?
- Does the service member/Veteran have any questions?

If the service member/Veteran reaches out to the Transition Coordinator, the TC should contact the CIC or ETS-SP National to ensure that the service member/Veteran's needs are being met in a timely manner.

Email templates to provide the TC with a formatted reply for an assortment of inquiries are found in the Resource section of this toolkit.

D. Frequently Asked Questions (FAQs)

Who should I contact when a service member/Veteran is unresponsive?

Contact ETS-SP National or the appropriate representative outlined to you.

How long do intake appointments usually take?

Appointments usually last about half an hour.

Why do I only ask the service member/Veteran some—but not all—of the questions on the intake form?

This is meant to respect the service members' time as well as verify only the areas of transition identified by the service member/Veteran on their enrollment form.

How long does it take for a service member/Veteran to be matched with a sponsor?

Matching usually takes between seven to ten days.

What criteria are used to determine a sponsor best suited for a particular service member/Veteran?

Geographical proximity is most important, as this maximizes the ability for sponsors to meet in-person with their service members/Veterans. It also allows service members/Veterans the ability to connect with someone who has knowledge of the resources in their (new) community.

What information will the sponsor have on the service member/Veteran post-intake?

The sponsor will receive all the information collected during the intake appointment. As a result, the sponsor will be armed with some knowledge of the service member/Veteran and his or her background. This is meant to facilitate the sponsor's initial meetings with the service member/Veteran and maximize the productivity of their sessions.

Can my spouse or any of my other relatives or friends receive a sponsor?

If your spouse, relative(s), or friend(s) are service members/Veterans themselves, they are eligible to enroll. If they are civilians, they are not eligible for any kind of sponsorship at this time.

What should I do if a service member/Veteran does not recognize me or recollect ETS Sponsorship when I call them?

Simply remind them who you are and what the purpose of ETS Sponsorship is. Service members/Veterans may not always remember enrolling. If the service member/Veteran obliges, proceed with the protocols as per usual. If the service member/Veteran reiterates a lack of recognition, ask if they would like to participate based on the information you have provided them. If they decline, simply let them know they can opt back in to participate at any time. In this case, ensure they have your contact information and manually record the outcome of this communication.

What should I do if a service member/Veteran misses the intake appointment?

Reconnect with them via their preferred method of communication and reattempt to schedule another appointment.

What email address should I use for my communications?

Please use your ETS Sponsorship email address for your communications.

IV. Resources

A. Initial Email to ETS-SP Newly Enrolled Service Member/Veteran

When a service member/Veteran enrolls in the ETS Sponsorship Program, he or she indicates their preferred method of communication. Should that be email, the Transition Coordinator uses the template below to schedule the intake phone call with the service member/Veteran.

Hello, (INSERT service member name),

My name is Transition Coordinator name and I look forward to serving as your Transition Coordinator through ETS Sponsorship. To get you started, I'd like to schedule a brief phone call so we can discuss your needs and concerns regarding our program. What might be a good day/time for us to connect?

Thanks for letting me know what best works for you! Welcome to the ETS Sponsorship Program!

Sincerely,

Transition Coordinator name

B. First phone call to ETS-SP Newly Enrolled Service Member

The TC has sent an email to the newly enrolled service member/Veteran requesting a time/date for an intake phone call. The service member has responded to the email with a specific time/date. Before making the call, the TC should review the enrollment form and note which areas contain information to help expedite the intake process. *Please be punctual!* The TC calls the service member at that agreed upon time on that date. The conversation goes like this:

“Good morning! (With enthusiasm!) This is the ETS Sponsorship Program, Tessa Transition Coordinator, speaking.”

Without sounding like a robot, the TC confirms the areas checked on the enrollment form. It is helpful to note comments that the service member makes during the intake that could be helpful for sponsors in their initial conversations with the service member.

C. Email in Response to Timeline Inquiry

After the Transition Coordinator has conducted the intake phone call and forwarded that information to the Community Integration Coordinator (CIC) or ETS-SP National (should there not be a CIC in the area the service member is moving to), the service member/Veteran will then be matched with a sponsor. If, after the intake phone call, the service member/Veteran reaches out to the Transition Coordinator to let the TC know that they have not yet heard from a sponsor, the TC should contact the CIC or ETS-SP National to ensure that the service member/Veteran's needs are being met in a timely manner.

The Transition Coordinator responds to the service member/Veteran using the email template below.

Hello (INSERT service member name),

Thank you for reaching out to me regarding a timeline of when you will be matched with your sponsor. Service members are ideally matched within 7-14 days after the Intake phase is complete. However, since each match requires consideration of the service member's destination location, interests and needs, sometimes the matching exceeds this timeline.

We appreciate you letting us know that you have yet to be matched and we assure you that we will carefully review and attempt to resolve your situation as soon as possible.

I'd like to connect you to the VA Health Liaison, (INSERT NAME), in [SMs state/most local to them] in the event you have any pressing needs or concerns prior to getting connected with your sponsor. (INSERT FIRST NAME) contact information follows:

(INSERT NAME] and [INSERT email address]

And please know that I'm here to assist you as well! Feel free to contact me as often as you'd like with any questions or concerns.

TC name and contact info

D. Monthly Tracking Emails

Transition Coordinators will reach out to their assigned service members/Veterans via email during the second week of the month (i.e., by Friday of that week) to check in. The purpose of this email is to ensure that their journey with their sponsor is going well.

The TC is encouraged to be personable, build rapport, and reflect the caring and empathy that the ETS-SP is built upon, while understanding that the deeper relationship should be between the service member/Veteran and his or her sponsor. The email template follows:

Hello (INSERT service member name),

Thank you for taking the time to talk with me on [date] and helping me get to know you better. As I mentioned at the end of our phone call, I'll do a monthly check-in with you via email. This is our first check-in!

I'll send these check in notes during the second week of every month. Please let me know if you have any questions or concerns or if you have any thoughts you'd like to share with me. I'm here to ensure that your relationship with your sponsor, _____, is working well for you both.

Please reach out to me if I can do anything to assist you. If I don't have the answer, I can find it for you!

I look forward to hearing how things are going.

TC name

After each monthly follow-up, the outcome of the followup is noted in the service member file.

- Did the service member/Veteran respond?
- If so, on what date?
- Do they have any questions?

E. VA Healthcare Liaison Directory

Please see your TC supervisor for the most updated directory.

F. Indicators of Concern

In all communication with the service member/Veteran, the Transition Coordinator should be aware of any indications of stress that might hinder the service member/Veteran's transition. Should the service member/Veteran note the following, the TC should immediately contact the identified ETS-SP National POC. All ETS-SP Transition Coordinators will be trained by the TC supervisor to ensure they are aware of indicators of concern and the appropriate protocols.