

Business Advising Expectations

At Accion Opportunity Fund, we are here to support you in your journey toward achieving your goals. To ensure a positive and productive experience for everyone involved, we have outlined business advising guidelines that help us maintain clarity, fairness, and mutual respect throughout the advising relationship.

1. No-Show Expectations

- **What We Expect:** We expect you to attend all of the sessions you schedule. Your advisor has invested significant time and energy into preparing for each session. By attending your scheduled sessions, you maximize the value of your advising relationship and ensure fairness to all participants. If you cannot attend a session, please reschedule 24 hours in advance.
 - **What We Consider a No-Show:** If you fail to attend your one-on-one session or arrive at the meeting over 5 minutes late, it is automatically considered a no-show.
 - **Exceptions:** If you miss a session due to unavoidable circumstances, please email [HYPERLINK "mailto:advising@aofund.org"](mailto:advising@aofund.org) advising@aofund.org to explain the situation.
 - **No-Show Consequences**
 - **First No-Show:** A courtesy reminder of this policy will be sent, and the missed session will not be rescheduled. If you have additional sessions scheduled, we will cancel them until we hear back from you.
 - **Second No-Show:** Depending on the circumstance, you may be removed from our advising services or placed on a probationary period.
 - **Reinstatement Process:** If you are removed due to repeated no-shows, you may contact advising@aofund.org to be reinstated 6 months after you were initially removed.
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2. Participation Expectations

- **What We Expect:** Please come prepared for all scheduled sessions and actively engage in discussions and activities. We encourage you to share applicable information about your business (e.g. business plans, financial statements, marketing strategies, etc.) before the session to increase productivity. In addition, we expect you to complete the majority of the action items assigned to you before your next session.

- **Notifying Absences:** If you haven't completed any of the work assigned from the previous session, please reschedule at least 24 hours in advance.
 - **Accountability:** Advisors will guide and support you, but your active participation is essential for progress. If you fail to complete any of the action items assigned by the third session, you may be placed on a probationary period until most of the work has been completed.
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3. Success Metrics Reporting Expectations

- **What We Expect:** Advising clients are asked to report key metrics including increase in sales, profitability, employees, and funding secured. We ask that you provide this information at each session along with the steps and action items completed. You may be asked to provide feedback or share success stories. Participation in such requests is voluntary, and we'll always seek your consent before sharing any information publicly.
- **Purpose:** To measure the impact and effectiveness of AOF's business advising, we track and report on success metrics. This allows us to evaluate participant progress and outcomes, and it helps us raise philanthropy to continue to offer these complimentary services.
- **How Data is Used:** Data is aggregated and anonymized to identify trends, improve the offering, and showcase outcomes to stakeholders. No individual participant will be identifiable in external reports.
- **How We Protect Your Data:** Your personal information is stored securely and used only for program-related purposes. To learn more about how we protect your data, please see our [privacy policy](#).

4. Primary Advisor Expectations

- **What We Expect:** To ensure that you have a productive and supportive advising relationship, we expect that you primarily work with the same advisor to reach your business goals. If you need help with something outside of your advisor's specialization, they will schedule a session for you with another advisor.
- **How to Request a Different Advisor:** If you feel that your current advisor is not the right fit, you may request a new advisor. Please contact advising@aofund.org with a brief explanation of your concerns. Our administrator will review your request and work with you to match you with an advisor who better suits your needs and preferences.

5. Confidentiality Expectations

- **What We Expect:** What you share during advising sessions stays confidential. This ensures a safe space for open dialogue.
 - **Exceptions:** Confidentiality may be waived if required by law or in cases where there is a risk of harm to you or others.
 - **Data Use:** Any data collected to improve the offering will be anonymized unless we obtain advanced written permission to include identifying attributes in our reporting.
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6. Code of Conduct Expectations

- **What We Expect:** Both participants and advisors are expected to communicate respectfully and professionally at all times.
- **Inclusive Environment:** Discrimination, harassment, or disrespectful behavior will not be tolerated and may result in permanent removal.