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**COACHING** FOR  
**Success**  
LEARNING COMMUNITY

X HALFTIME REPORT

# GOAL SETTING: FORMING A GAME PLAN



# PRESENTER

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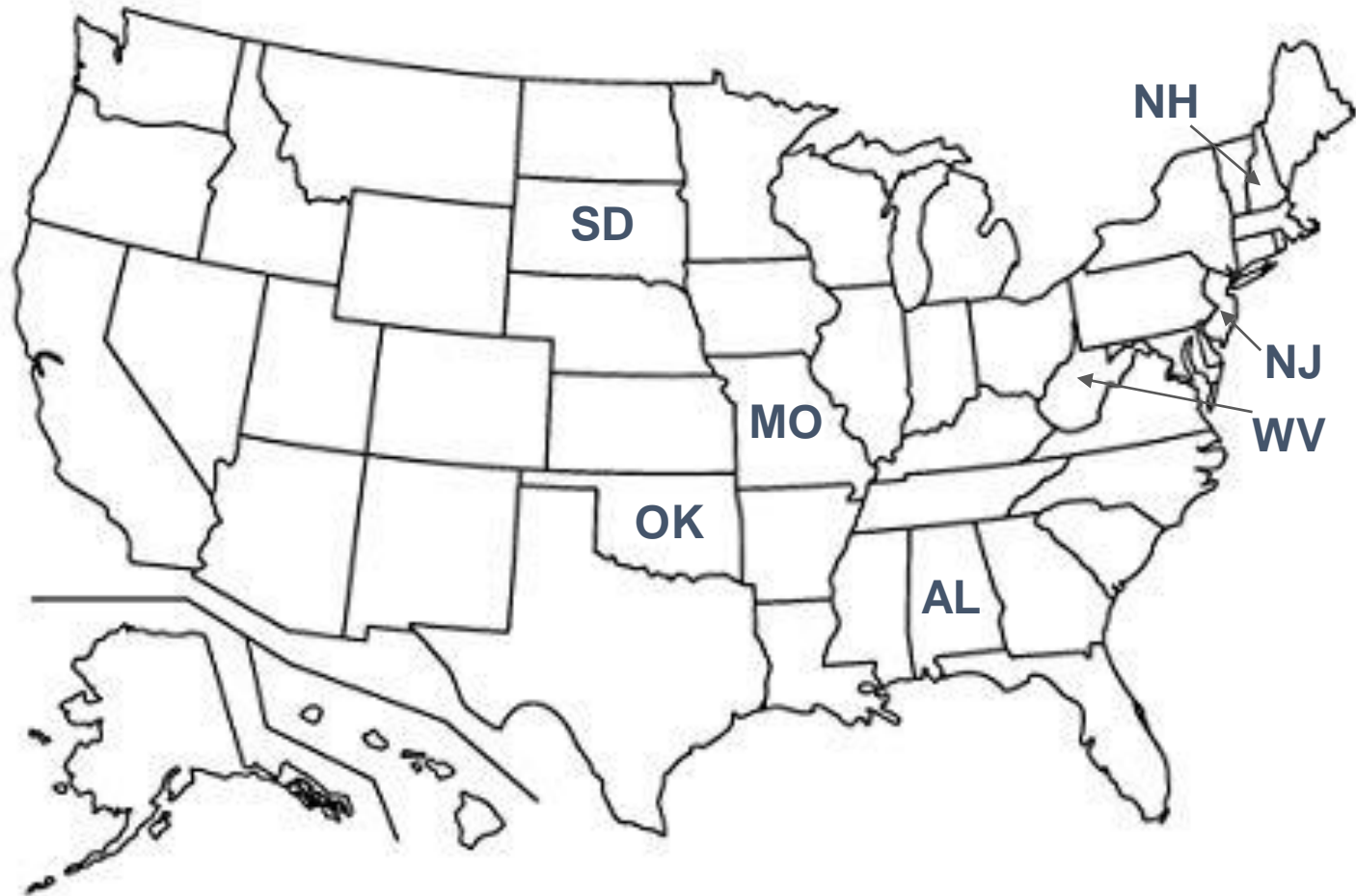
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MDRC | Families & Children Policy Area



# COACHING FOR SUCCESS LEADERS

- Alabama
- Missouri
- New Hampshire
- New Jersey
- Oklahoma
- South Dakota
- West Virginia





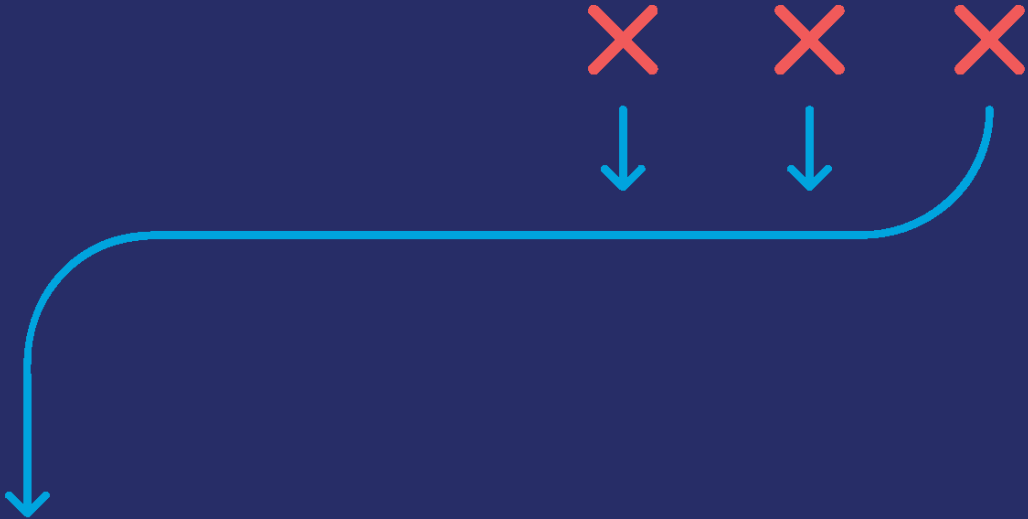
# PURPOSE

- Reflect on goal setting in our own lives and how we might apply similar strategies to goal setting with customers
- Examine best practices for supporting our customers in goal setting and goal achievement





# GOAL SETTING



**Building  
Trusting  
Relationships**

**Accountability  
& Follow Up**

**Goals  
Orientation**

**Problem  
Solving**

**Self-Assessment  
& Goal Setting**

**Capacity to Aspire**

**Motivation**

# **ROADMAP TO COACHING**

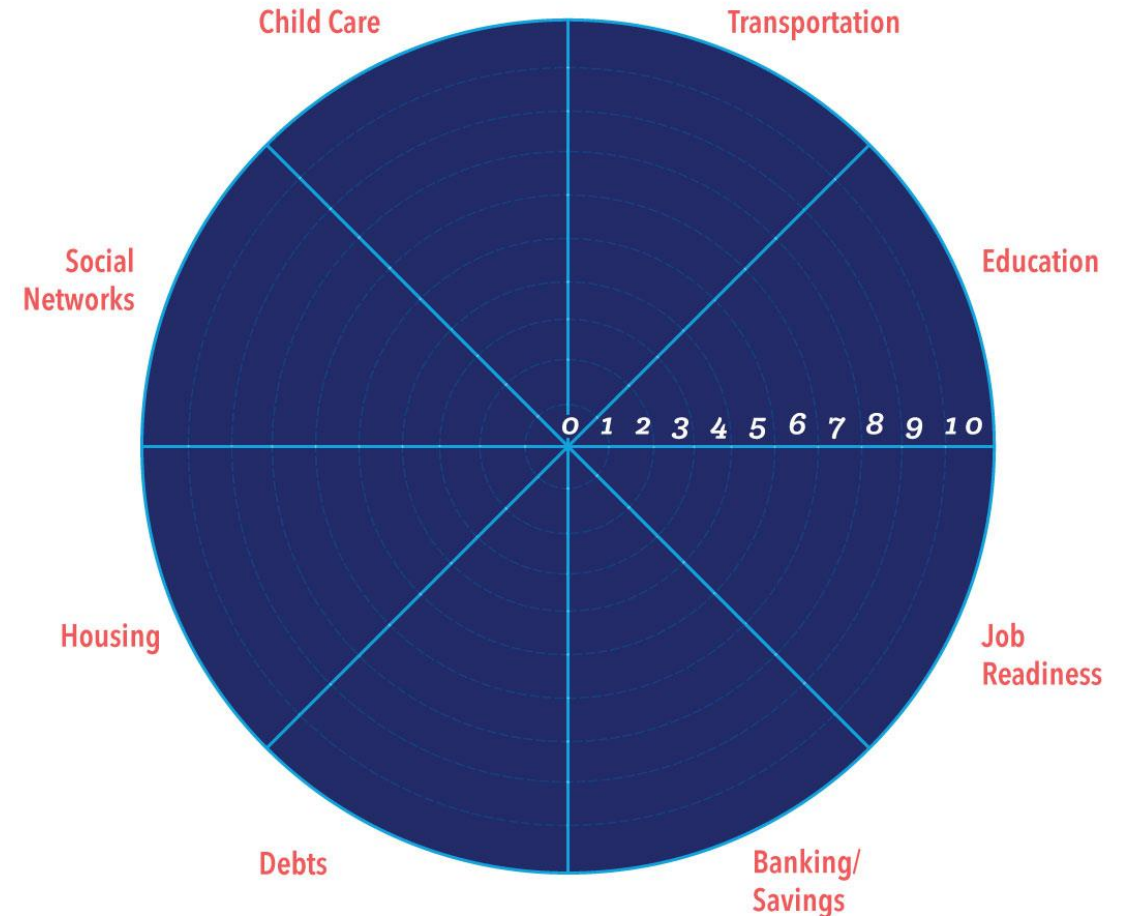
# SELF ASSESSMENT

- Where do I see myself?
- Where do I want to go?



# GOAL SETTING/DECISION WHEEL

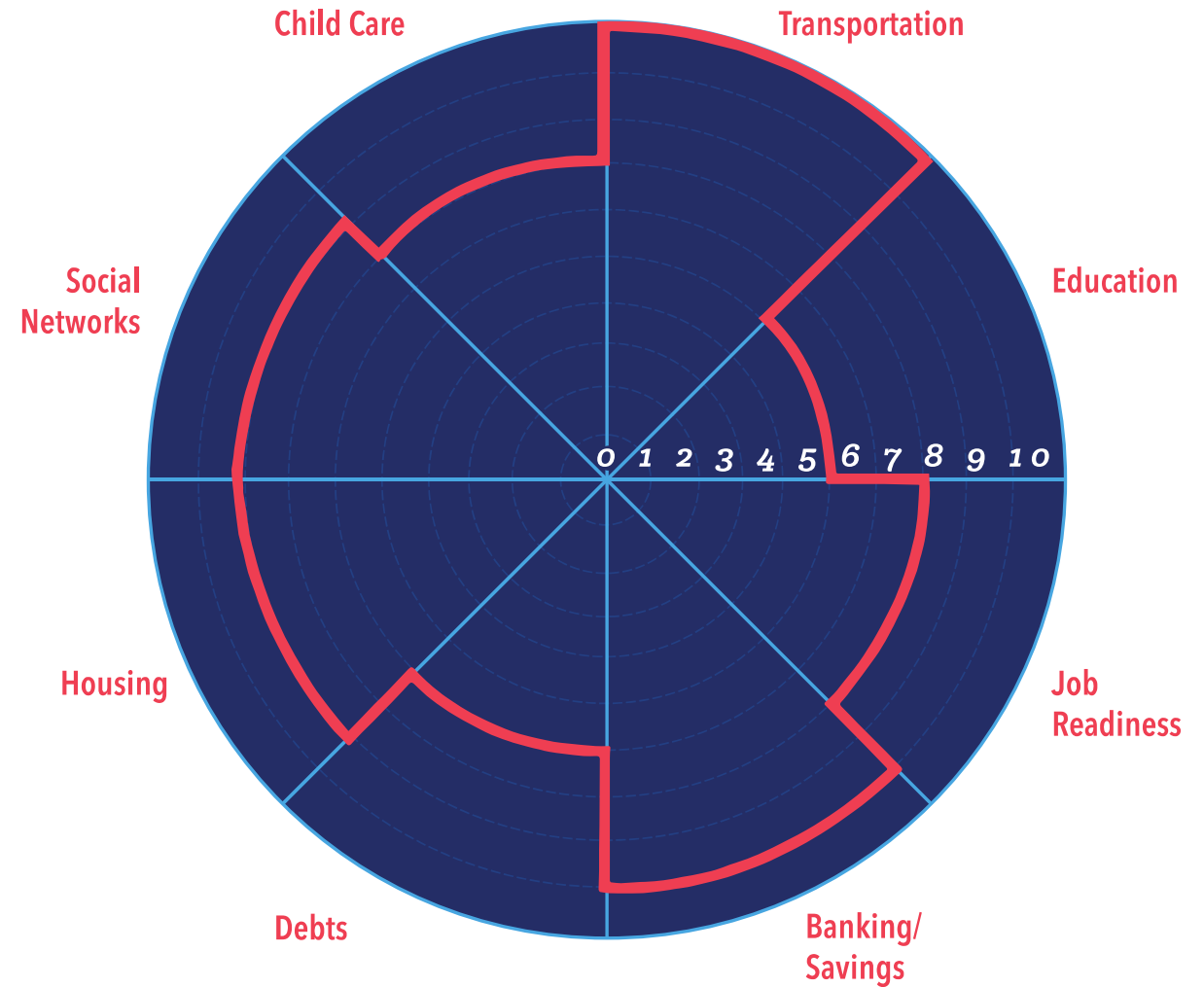
- The eight (8) sections of the wheel represent areas of balance for your goals.
- Rank your level of confidence in each area by drawing curved lines to create a new outer edge.
  - 0 = very dissatisfied
  - 10 = extremely satisfied



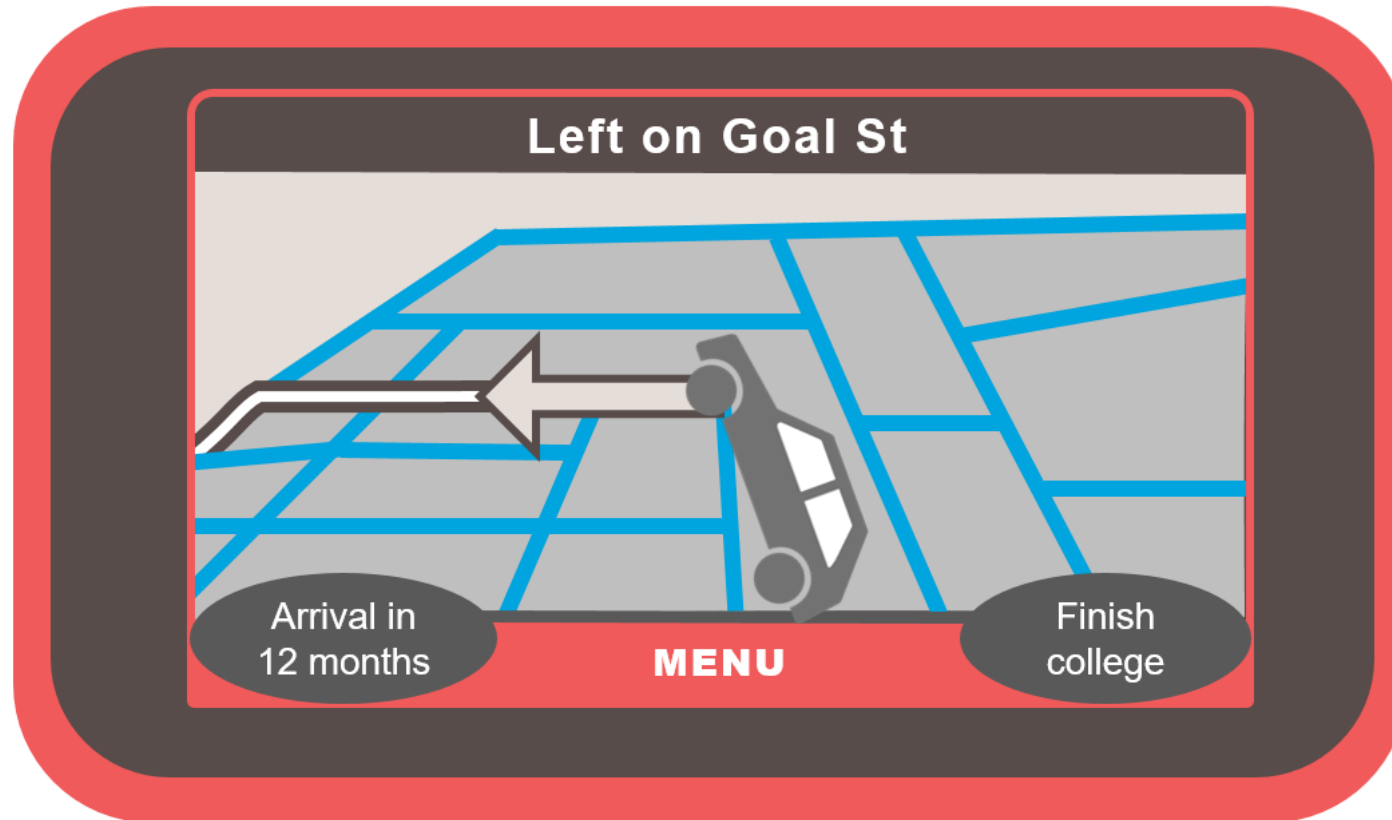


# HOW BUMPY IS YOUR RIDE?

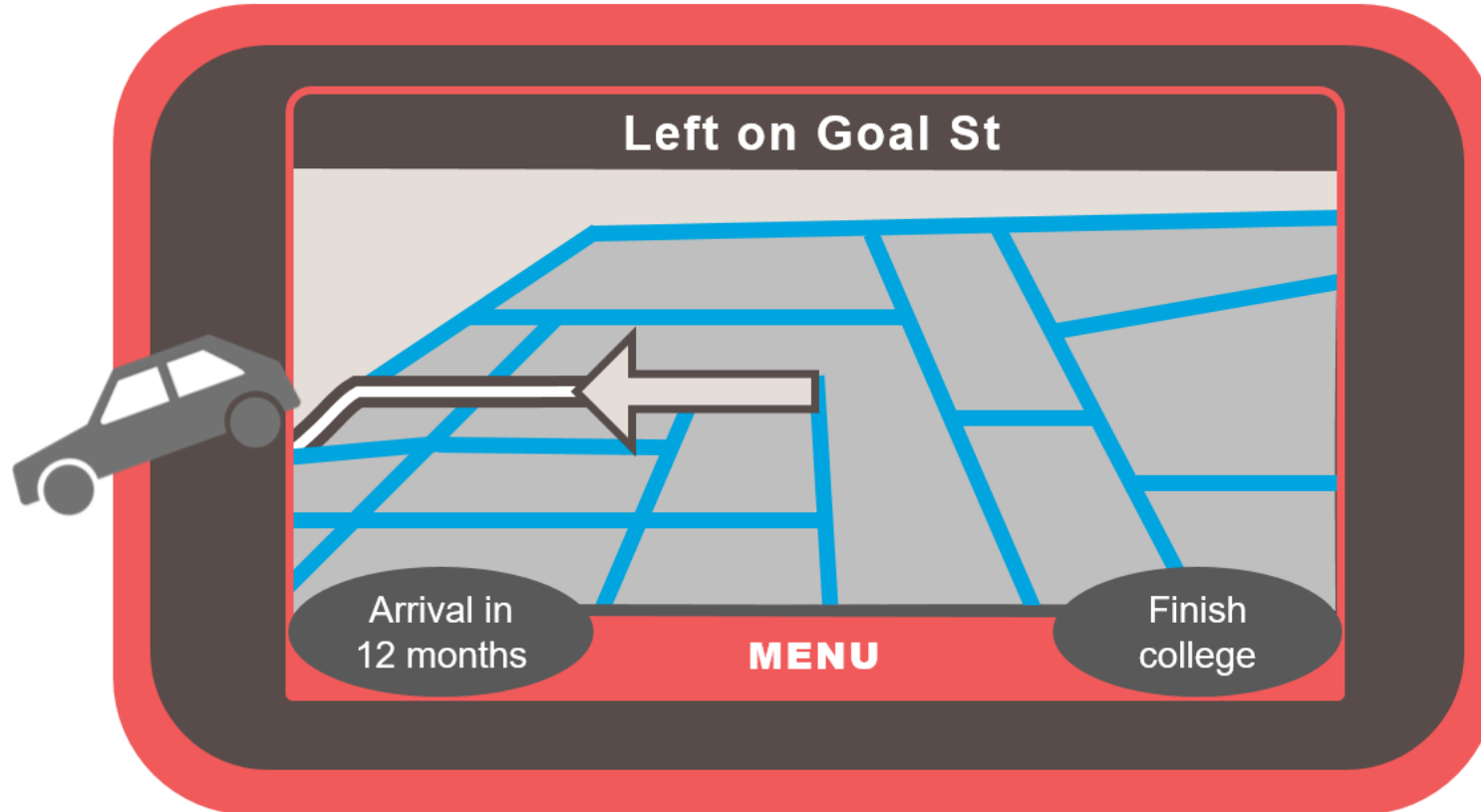
- The new perimeter represents your personal Goal Setting/Decision Wheel



# GOAL SETTING AS A GPS



# GOAL SETTING AS A GPS



# Road Map to Success

Member ID/Case#: \_\_\_\_\_

(First Name)

*My Starting Point:*

*My Motivation for Success:*

*Growth Goal #1:*

*Planned Completion Date:* \_\_\_\_\_

*Growth Goal #2:*

*Planned Completion Date:* \_\_\_\_\_

*Growth Goal #3:*

*Planned Completion Date:* \_\_\_\_\_

*My Long-Term Goal:*

Date last Revised: \_\_\_\_\_

ES Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Customer Signature: \_\_\_\_\_ Date: \_\_\_\_\_







# SMART GOALS



**S** SPECIFIC

**M** MEASURABLE

**A** ATTAINABLE

**R** RELEVANT

**T** TIME-BOUND





# IS THIS A SMART GOAL?

- Imagine I'm working with a customer name Carlos, and his goal is to get a job.



# IS THIS A SMART GOAL?

- Imagine I am working with a customer named Elena, and her goal is to secure child care by March 31.



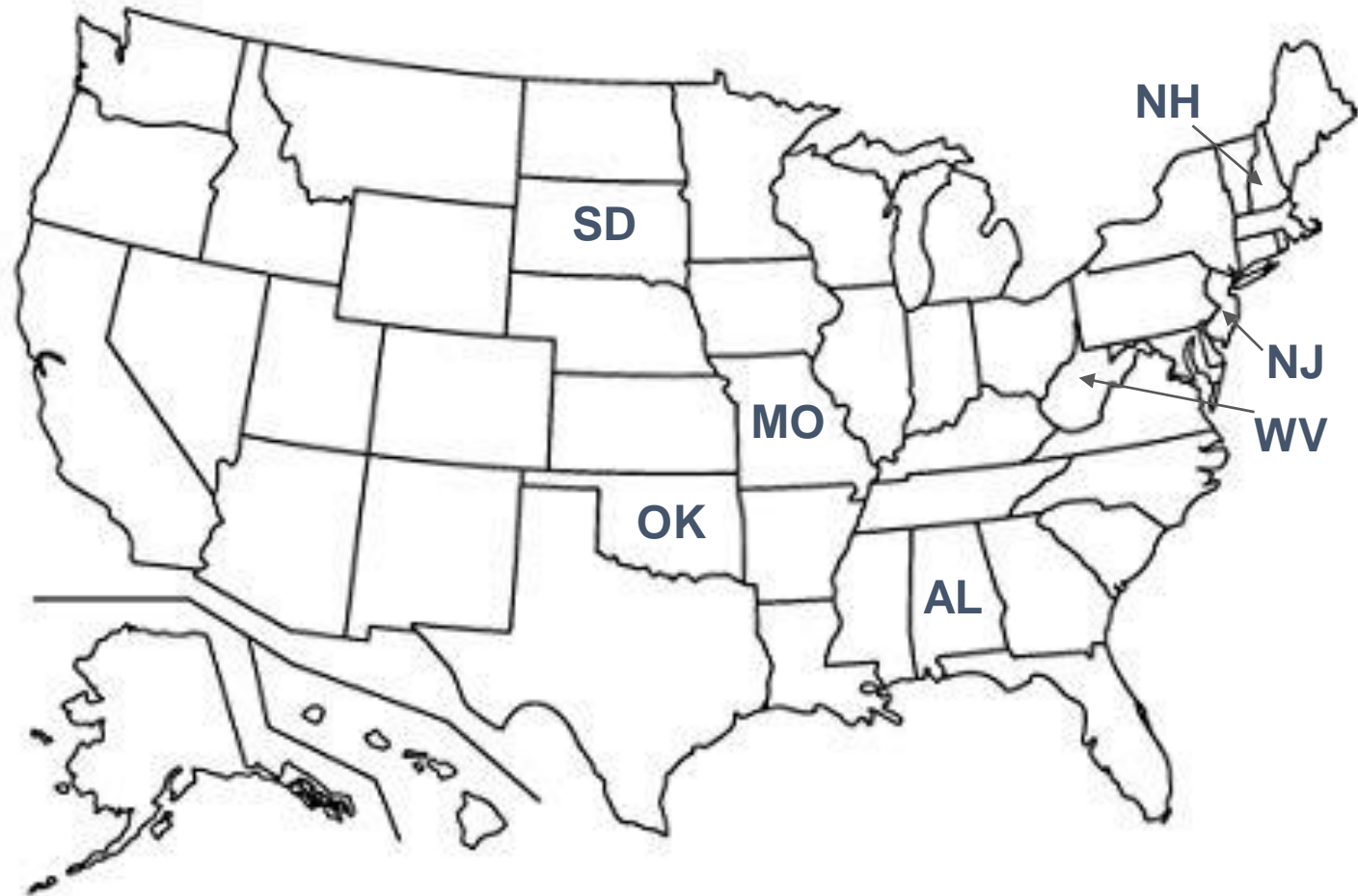
# HOW CAN WE MAKE THIS GOAL SMART-ER

- Now, imagine I am working with a customer named Claudia, and her goal is to find housing.



# TAKE AWAYS

- Alabama
- Missouri
- New Hampshire
- New Jersey
- Oklahoma
- South Dakota
- West Virginia





# QUESTIONS OR COMMENTS?





# TIP SHEET

Integrating Innovative Employment & Economic  
Stability Strategies into TANF Programs

**TANF**  
Works!

## Goal Setting Webinar

### TIP SHEET

It is always important to remember that goal setting is a process, and it takes time and commitment from both parties: the coach and the customer. As coaches, we help customers aspire and gain motivation to achieve their goals.

#### 1. SELF-ASSESSMENT - WHAT REALLY MOTIVATES THE CUSTOMER?

##### QUESTIONS TO ASK:

- Where do I see myself?
- Where do I want to go?

##### USE THE GOAL SETTING / DECISION WHEEL:

- Which section of the wheel do you want to start with?
- On a scale of zero to ten, how confident do you feel about this area?
- Use motivational interviewing skills to discuss assessment of all 8 areas.

#### 2. PRIORITIZE GOALS

- Where does customer want to start?
- Do the SMART Goal check: Are customer's goals Specific, Measurable, Attainable, Relevant & Time-Bound?
- Practice active listening skills to support participants in identifying, prioritizing, and redefining their goals with action steps.

#### 3. RECORD GOAL AND ACTION STEPS INTO A "CONTRACT" AND OFFER A MEANINGFUL FORM OF RECOGNITION

- Break down goal into small steps.
- Use goal setting tools (e.g. Road Map to Success) to map out the steps.

#### 4. PLAN FOR CHALLENGES

- Identify potential supports and challenges.
- Talk through how participants can use their supports to offset the challenges.

#### 5. WORK ON GOALS

- Follow up regularly and offer positive accountability.

#### 6. REFLECT ON THE PROCESS

- Was the goal achieved?

#### 7. SET NEW GOALS!

## Goal Setting Webinar

### WORKSHEET

Think of a goal you have personally set for yourself at any time in your life. It can be professional or personal. **Write the goal here along with some thoughts about how you set it and how you achieved it.**



Now, think back to before you set the goal you described above.

**What kind of self-assessment did you engage in that brought you to that goal?**

*For example, if it was an exercise goal, perhaps you examined your health at the time and decided you wanted to improve it in some way. Or, if it was an employment-related goal, perhaps you noticed your earnings at the time, compared them to your expenses, and set a goal to increase your earnings.*



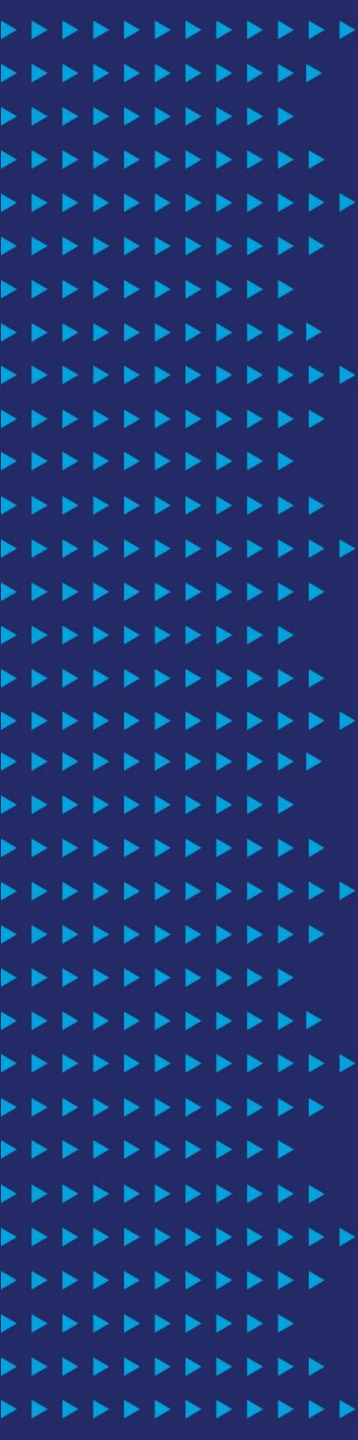
# WORK SHEET

# FOR MORE INFORMATION

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