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OFA PeerTA Technical Assistance Network
Kentucky Community and Technical College System (KCTCS)
Technical Assistance Request #232
Mobility Mentoring® Essentials Training Summary Report

Prepared for
The Administration for Children and Families
Office of Family Assistance



Background and Statement of Issue:¹

Kentucky has been providing education-focused and work participation-driven case management to the TANF population since 1998. The TA Requestor, Ms. Shauna King-Simms, Director of Transitional Education Programs at the Kentucky Community and Technical College System (KCTCS) heard a description of Crittenton Women’s Union’s (CWU’s) Mobility Mentoring® Model and was interested in integrating components of it into Kentucky’s program. Kentucky conducts similar case management activities with its Ready to Work and Work and Learn programs, but was interested in enhancing the current practices using this model.

CWU is an economic mobility organization and the largest provider of transitional housing for homeless families in the greater Boston area. The organization provides job readiness training, parenting programs, and adult education. Almost 1,300 individuals are served each year. Ninety-two percent have a high school education or less. CWU’s clients are largely TANF participants with average earnings of \$730 per month per family and the population is racially diverse. Their Mobility Mentoring® Model is the long-term developmental partnership between trained staff and program participants through which participants acquire the resources, knowledge, and skills necessary to attain and preserve economic independence.

The essential elements of Mobility Mentoring® involve:

- **Bridge to Self-Sufficiency Assessment:** CWU staff help program participants complete an initial assessment using the Bridge to Self-Sufficiency to determine the participant’s current stage in each pillar. The Bridge Assessment tool identifies strengths that will support participant’s goal attainment and help them surmount obstacles that might inhibit success.
- **Personalized Action Plan:** After being assessed, program participants work with staff to create a practical, achievable plan to attain a family-sustaining jobs, build savings, reduce debt, finish college, and meet other customized goals. Participants identify their own unique short- and long-term milestones, outline steps and set a time-frame to reach them. Periodically, staff and the participant will reassess these customized plans, reviewing accomplishments and setting new goals to reach long-range objectives.
- **Incentives:** Mobility Mentoring® offers incentives—financial and otherwise—when participants reach significant targets in their personalized plan. In addition to cash incentives, participants could also be eligible for matched savings, enabling them to build reserve funds faster.
- **Coaching:** This professionalized staffing approach uses the Bridge to Self-Sufficiency as a framework through which to engage program participants in a deliberate one-on-one “partnership.” Staff is trained in mentoring processes and approaches designed to improve participant decision-making, persistence, and resilience and through long-term repeated practice. In this way, the habits and practices of Mobility Mentoring® become internalized, allowing the participant to eventually mentor and coach themselves and their families in ways that support economic independence.

¹ This information was collected from the Kentucky Cabinet for Health and Family Services’ Technical Assistance Request and conference calls with the TA Requestors.



The Kentucky Cabinet for Health and Family Services requested TA to support the integration of components of CWU's Mobility Mentoring® Model for case management. The OFA PeerTA team agreed to support this request and created a TA plan with the following objectives:

- Collaborate with CWU to provide Kentucky with a tailored, two-day training on CWU's Mobility Mentoring® Model for their Ready to Work staff at the KCTCS system office in Versailles, Kentucky. The training was prepared to accommodate approximately 45 Kentucky Ready to Work staff and three staff from the Department for Community Based Services (a Kentucky TANF agency), with a maximum of 50 participants in total.
- Support an outcomes-focused training that encourages implementation and sustainability of what is learned, so Kentucky can integrate the core concepts learned into their program(s) at a statewide level.

Mobility Mentoring® Essentials Training – Day One

The Mobility Mentoring® Essentials Training was conducted on June 2-3, 2015 at the KCTCS system office in Versailles, Kentucky. CWU trainers, Jennifer Lowe, Ph.D., Assistant Vice President of Research and Knowledge Sharing, and Sara Delaney, Program Coordinator of Mobility Mentoring® Center Boston provided information and resources to 43 participants. The attendee breakdown included 33 Ready to Work and Work and Learn staff, four Target Assessment Program staff (TANF-funded mental health professionals), two Department for Community Based Services staff, two Kentucky Coalition Against Domestic Violence (IDA and financial literacy partner) staff, and two Kentucky Public University TANF staff.

The trainers reviewed the three goals for the scheduled training:

1. Provide participants an understanding of the Mobility Mentoring® approach, theories, and tools;
2. Provide participants a sufficient level of skill and comfort to engage in conversations informed by research on the impact of trauma and toxic stress on executive functioning skills; and
3. Provide participants at least two strategies, tools, or ideas for use in their work

Participants completed a self-assessment and reflection exercise on executive functioning (EF) skills and strategies. The group discussed makes a good leader, and shared a definition of executive functioning and executive function skills as the mental processes and skills that include impulse control, working memory, and mental flexibility, and that govern strategic thinking processes such as problem-solving, goal setting, and goal attainment. The participants completed an Executive Skills Questionnaire for Adults, which was designed to identify individual strengths and challenges with executive skills, i.e. the skills people use every day to manage their lives and achieve their goals. On a Likert scale of 1 (Strongly Disagree) to 6 (Strongly Agree), participants rated items such as:

- I don't jump to conclusions.
- I have a good memory for facts, dates, and details.



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- When frustrated or angry, I keep my cool.
- I rarely wait to the last minute to finish jobs.
- I find it easy to stay focused on what I'm doing.
- Unexpected events don't upset me.

The trainers provided an overview primary EF skills, impulse (or inhibitory) control, which refers to the skills used to filter distractions, resist temptation, preserve focus, pause and reflect before acting, and maintain persistence despite worry or fear. Participants received the keys to understanding working memory, which is the ability to mentally hold and manipulate information over short periods of time, simultaneously think of multiple things, retain information from one place and incorporate with information from another, follow multi-step instructions, and return to and continue performing tasks after pausing or stopping temporarily without confusion or loss of continuity. Participants reviewed mental (or cognitive) flexibility, which is the ability to multitask, change plans, re-establish priorities, apply different rules or social skills in different environments, adjust strategies based on external input, and innovate.

Mobility Mentoring® and its Theoretical Basis

All of this information served as the backdrop for the second training component, Mobility Mentoring® and its Theoretical Basis. The trainers shared that the Mobility Mentoring® model was based on the idea that navigating one's self and family out of poverty is a stressful process. CWU families face significant stress; their average monthly income is \$664. In addition:

- 75% are currently homeless or have a recent history of homelessness;
- 40% report a major mental health diagnosis;
- 43% report a history of abuse, violence, and/or trauma;
- 35% report a physical, cognitive, and/or mental health disability that serves as a barrier to work or school; and
- 50% have at least one child with diagnosed special needs.

Experiencing these extreme levels of stress significantly impacts EF skills, so CWU created a framework to directly address stress-related challenges, including difficulties managing thoughts, organization, and learning; behavior, emotions, and interpersonal relationships; and health and well-being. Thus, the Mobility Mentoring® model is the professional practice of partnering with clients so that over time they may acquire the resources, skills, and sustained behavior changes necessary to attain and preserve their economic independence. The model is based on a theory of change that combines contextualized and future oriented decision making, and is represented by the Mobility Mentoring® Bridge to Self-Sufficiency®. The Bridge includes five pillars – family stability, well-being, education and training, financial management, and employment and career management – and turns the long-term vision of economic self-sufficiency into actionable steps for coaches to guide and for individuals to follow. (The Bridge will be discussed in further detail later in this report.)



Mobility Mentors work with participants to assess their strengths and challenges, and to set personal and individual goals. They do not spend time determining where clients started; they deal with them “where they are.” The mentoring process is a brain-science based program design, which adheres to the following tenets to maximize acceptance and retention:

- Mentoring should occur in a calm, safe, and relaxed environment.
- Mentor approaches should be visual, not just auditory.
- Program materials should be simple and easy to read, not overwhelming.
- Program should be easily accessible and consistently available.
- Staff should be continually trained and familiar with new evidence-based approaches.

Mentors also use brain-science based tools, including personal organization strategies and tools, reminders/prompts, goals contracts (copies are provided to both coaches and clients), incentives (verbal recognition or financial incentives can help clients overcome the mental hurdle of beginning the process), impulse/distraction control strategies, automatic goal-attainment strategies, and problem-solving and goal setting frameworks.

The coaching is EF-informed; they begin by asking, “What is important to you?” When addressing problem-solving, mentors encourage clients to explore and weigh their options, and to develop a “Plan B” just in case. They also discuss impulse control techniques, and weighing actions against future consequences. Mentors pursue improving social skills and learning to consider other points of view by organizing clients to work in groups; this also extends to reviewing the social skills and expectations for behavior while listening to guest speakers/presentations. In addition, mentors encourage leadership opportunities for their clients, whether in groups or during individual tasks, and are sure to provide support and/or acknowledgment for jobs well done. The number and complexity of goals increase proportionately with the clients’ participation in the program.

Mobility Mentors also focus their clients on shifting their time and resources from Crisis Management (externally-generated priorities) to Goals Attainment (internally-set priorities). The common refrain for clients is, “How will I not let this crisis derail me from accomplishing my goal?” The trainers then shared some data to show the impact of the Mobility Mentoring® Model. In FY 2014, CWU’s Career Family Opportunity program participants achieved a 70% overall Mobility goal achievement rate, and 95% were either enrolled in school or working. Their participation in receiving TAFDC cash benefits and SNAP food benefits was reduced (from 16% to 6% and 63% to 47%, respectively), and their employment rate increased from 69% to 82%.

Mobility Mentoring® Key Elements

The trainers then shared the fundamental components of Mobility Mentoring®:

1. Bridge to Self-Sufficiency® scaffolding
2. Clear goal setting and outcomes measurement



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3. Incentives
4. Coaching

They first focused on the Bridge to Self-Sufficiency®. As mentioned previously, the Bridge has five pillars or goals that combined represent economic self-sufficiency:

- Family Stability – independently housed with payments costing less than 30% of income; dependent needs must be met and cannot serve as a barrier
- Well-Being – physical, mental and behavioral health as well as social supports
- Education and Training – post-secondary education or training leading to a career paying a family’s individual index wage
- Financial Management – liquid assets greater than three months’ living expenses, debts in balance with income, credit not a barrier
- Employment and Career Management – job that pays household index for economic independence

The trainers shared that \$50,002 is the required annual income before taxes to meet the living wage for a single parent with two children in Fayette County, Kentucky, according to MIT’s Living Wage Calculator. They reviewed the individual expenses that comprise the living wage, including food, child care, medical, housing, and transportation, among others.

To support families in achieving economic self-sufficiency, they discussed how the Bridge framework provides the “scaffolding” to mitigate EF deficits and decrease the “bandwidth tax” of poverty. They use the term “scaffolding,” because it is taken away once the work is done. The framework is designed to depict interconnections between pillars and steps on the scaffolding with visual and written representations. The trainers then roleplayed how to conduct a Bridge assessment for individual clients, including introducing the Bridge concept for the first time to “Lauren,” a 27-year-old mother of an 18-month-old daughter, and discussing her goals for the future.

They reminded the participants that every mentor will have his/her own style and approach, and that the mentor program goals should drive the questions asked during the assessment. The trainers added that the training participants will be able to use their past experiences and observations to further refine their questions as they gain more experience with the process. The trainers then began a walk-through of the Bridge assessment. Mentors should begin by introducing the Bridge and the Mobility Mentoring® program, and then ask, “Where does the client wish to begin the conversation? What does economic self-sufficiency mean, and what does it look like?” It must be repeatedly emphasized that this will be a collaborative approach.

Helpful phrases to discuss the Bridge include “snapshot in time,” “roadmap to your goals,” “help to prioritize and organize information,” and “life is a journey, your Bridge will change over time.” As the assessment process concludes, mentors should thank the clients for the opportunity



to work with them, and encourage them to reflect on the process by asking if they learned anything new about themselves, and if there are any concerns moving forward. They should also take the time to highlight clients' strengths and discuss their challenges, while connecting both to the goals that were collaboratively set. The trainers then asked the attendees to break into pairs and practice introducing the Bridge concept, the assessment tool, and reviewing 1-2 pillars. They provided the attendees with a "Guidelines for Opening Up Conversation about the Bridge Pillars" document, which included sample introductory statements and follow-up questions for each pillar.

After an exercise debrief, the training closed for the day.

Mobility Mentoring® Essentials Training – Day Two

Upon opening, the trainers conducted a quick debrief of the previous day and then announced the group would be focusing on the second fundamental component of Mobility Mentoring®.

Key Elements: Goal Setting and Outcomes Measurement

In discussing clear goal setting and outcomes measurement, the trainers noted that Mobility Mentoring® goals should:

- Lead towards economic mobility outcomes
- Strengthen each pillar of the Bridge, but not in isolation
- Be SMART goals
- Allow for the collecting and utilization of data to measure individual client progress
- Help measure program progress and effectiveness, resulting in iterative innovation over time

The trainers reviewed the goal setting process and stressed that it should not be introduced in the first client meeting, because goal setting is difficult. Mentors must serve as motivators to counteract the "demotivators" that often inhabit their clients' lives. A common starting question is, "Where do you want to be in five years?" The process is circular and ongoing, and includes the following steps:

1. Assessment – Use the Bridge assessment to reflect on client's current position and determine how the Bridge pillars interconnect
2. Tune In – Ask the client to review his/her strengths and challenges, and identify what values are most important to him/her. Is he/she excited? Afraid?
3. Identify Potential Goals – Brainstorm possible goals to help clients get to where he/she wants to be.
4. Prioritize and Refine Goals – Help client narrow a list of a few high-priority items, and refine those using SMART criteria. Also organize as short-term goals, feeding into longer-term goals.



5. Identify Supports and Challenges – Help client identify personal and professional supports, and internal and external challenges. Collaborate on developing strategies for utilizing supports and overcoming obstacles.
6. Identify Action Steps – Work with client to break down each goal into specific, manageable, time-limited steps.
7. Work on Goals – While client works towards goals, check in with him/her and revise action steps and timelines if necessary. If the client wishes to change or eliminate a goal, engage in thorough discussion and exploration of rationale.
8. Reflect on the Process – Ask client what did or did not work, and what lessons were learned? How did it feel to work towards and accomplish your goals? Are you ready for higher-level goals?

The process would then return to Step 1, and begin all over again. The trainers provided the participants with a document detailing the goal setting process for their use, as well as a “Developing A SMART Mobility Goal” document, which they used to review the definition of SMART goals – Specific, Measurable, Attainable, Relevant, and Time-bound. To further illustrate the process, the trainers utilized a Goal Setting Case Study that described “Lauren” and the challenges she faces. The trainers roleplayed a discussion between Lauren and her mentor, and then provided the participants with a copy of Lauren’s Bridge Assessment, which indicated her progress thus far on each of the five pillars, a Mobility Mentoring® Goal Setting Guide, and a Mobility Mentoring® Goal Action Plan. The participants broke up into small groups to review Lauren’s assessment and set SMART goals for her, including action steps for each. The larger group then reconvened to share the goals they set.

Key Elements: Incentives

After a goal setting debrief, the trainers continued with the third fundamental component of Mobility Mentoring®, which is incentives. The trainers shared that research supports using early incentives to inspire long-term achievements or outcomes. Incentives also encourage small steps that may not present immediate outcomes, but have value in achieving long-term goals, such as working to pay off debts, which improves credit and allows for purchasing of future assets. They discussed providing financial resources to support behavioral change, which can include paying a babysitter while studying for a test, and/or paying for a licensing exam, additional transportation, or clothing for interviews.

Mobility Mentors offer incentives such as cash, gift cards, and savings matches. Additional incentives include recognition by not only the mentors, but also ensuring that clients receive acknowledgement from peers, family members, and the public at large for accomplishments like earning a diploma, reaching a certain savings level, and/or purchasing a home. Even simply tracking movement up the pillars and across the Bridge can depict acknowledgement and provide incentive.



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Key Elements: Coaching

The trainers then reviewed the fourth fundamental component of Mobility Mentoring®, which is coaching. The first responsibility of Mobility Mentors is to introduce their clients to the concept that their environments can, in fact, be changed. This change comes from containing crisis stimuli long enough to begin to grow alternative skills and behaviors, and overcoming the struggle with self-regulations and impulse control. In coaching, the mentor must first see the client as successful; they then help him/her to consider and prioritize options, contextualize crises, and maintain focus on agreed upon pathways to change. The intent is to show over time that clients can practice these skills on their own.

To help support EF skills through coaching, the trainers provided the participants with a document entitled, “Tips for Engaging in Conversations Using an Executive Function Framework,” which included suggestions for supporting and collaborating with clients regarding metacognition (thinking about how we think), impulse control/inhibition, working memory, cognitive flexibility, planning and organization, and agency throughout the entire Mobility Mentoring® process.

The group then engaged in a final discussion and Q&A session, and closed for the day.

Next Steps

At the conclusion of the training, OFA PeerTA staff reviewed the next steps in completing the KCTCS TA request, along with who was responsible for completing each task:

- Schedule a follow-up conference call on July 2015 to review progress and discuss any other needed TA (Steve McLaine – OFA PeerTA).
- Compile and share evaluations of the training with KCTCS (Steve McLaine – OFA PeerTA; Jennifer Lowe – Crittenton Women’s Union).
- E-mail additional resources to training participants, including O*NET and U.S. Bureau of Labor statistics (Jennifer Lowe – Crittenton Women’s Union).



Mobility Mentoring® Essentials KCTC System Office, Room 102A

June 2, 2015: DAY ONE 8:30 a.m. – 4 p.m.

8:30 a.m.	Networking
9:00 a.m.	Welcome and Introductions
9:30 a.m.	Self-Reflection Exercise on Executive Functioning Skills and Strategies
10:15 a.m.	Mobility Mentoring and its Theoretical Basis
	Strategies to Mitigate Stress Related Challenges
	Role Play: Crisis Containment and “The Green Edge of the Wedge”
12 noon	LUNCH
1:00 p.m.	Mobility Mentoring Key Elements
	Key Element: The Bridge to Self-Sufficiency®
	Bridge to Self-Sufficiency® in Practice: Role Playing and Practice in Pairs
	Exercise Debrief
3:00 - 4:00 p.m.	Final Discussion, Q&A, and Wrap Up

June 3, 2015: DAY TWO 8:30 a.m. – 12 noon

8:30 a.m.	Networking
9:00 a.m.	Welcome and Discussion/Debrief from Day One
9:30 a.m.	Key Elements: Goal Setting and Outcomes Measurement
	Goal Setting Role Play and Small Group Exercise
	Goal Setting Debrief
10:30 a.m.	Key Element: Incentives
11:00 a.m.	Key Element: Coaching
	Coaching to Support EF Skills
11:30 a.m. - 12 noon	Final Discussion, Q&A, and Wrap Up