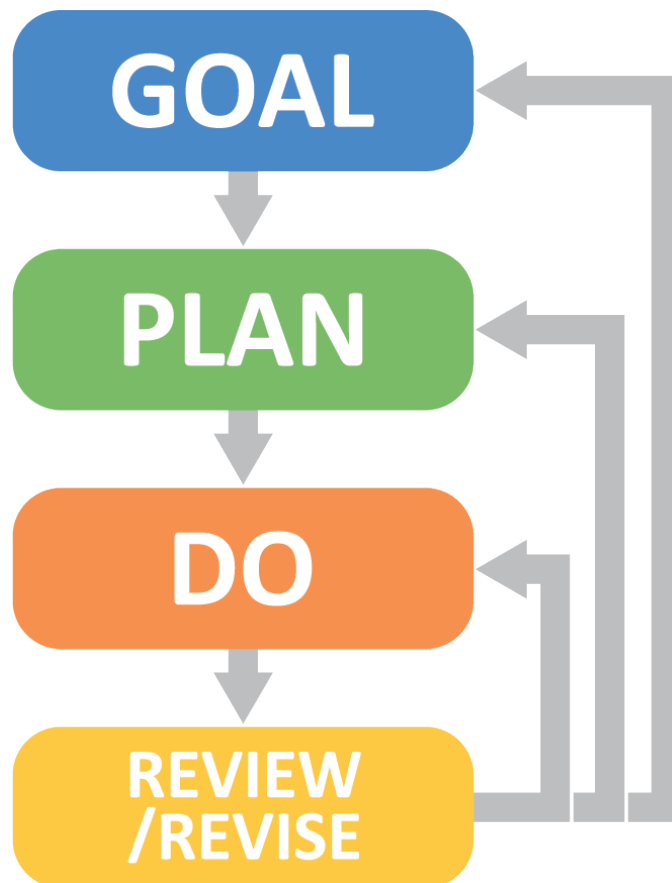# Goal, Plan, Do, Review and Revise (GPDR/R)

**An Executive Function-Informed
Goal Achievement Framework
for Use in Human Service Programs**

August 2018

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THE GPDR/R FOUNDATION

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PREFACE

The development of approaches that explicitly focus on building and supporting executive function skills and core adult capabilities in human service and job search programs largely has grown out of efforts by the Center on the Developing Child at Harvard University to elevate the important role that adults play in producing breakthrough outcomes for children. The Annie E. Casey Foundation, wanting to advance the development of this framework for helping adults become successful workers and parents, has funded several initiatives aimed at identifying ways in which employment and related human service programs can use executive function and self-regulation principles and concepts to improve outcomes for parents. In that vein, they have provided the funding for the development of this guide for human services staff.

In the development of this manual, we have drawn on the work of Richard Guare, neuropsychologist and applied behavioral analyst and Peg Dawson, educational psychologist, authors of the *Smart But Scattered* series, Phil Zelazo, a neuroscientist at the University of Minnesota, Lauren Kenworthy, a neuropsychologist and her colleagues at Children's National Medical Center (Goal, Plan, Do, Check), Sarah Ward and Kristen Jacobsen, speech and language therapists at Cognitive Connections (Ready, Do, Done), Silvia Bunge, a neuroscientist at Berkley, and Gabriele Oettingen, psychology professor at New York University and author of *Rethinking Positive Thinking*.

LaDonna Pavetti, Vice President for Family Income Support at the Center on Budget and Policy Priorities led development of the GPDR/R model and the creation of this manual. Valerie Uccellani, Owner and Senior Partner at Global Learning Partners and Megan Stanley, independent consultant, acted as co-creators. In the development of this guide, we have benefited from the input from a number of our colleagues and partners in the field who were willing to test out the tools and pilot some of the group activities. We all owe an incredible debt to Dick Guare who schooled us in how executive skills play out in every aspect of adults' lives.

August, 2018

THE GPDR/R FOUNDATION

Chapter 1: Introduction and Preview of GRDR/R

Background

Recent advances in our understanding of the core capabilities that lead to adult success have encouraged the development of new approaches for organizing and delivering human service programs. Key components of these core capabilities are executive function and self-regulation skills -- foundational skills that help us focus, make decisions, set goals, control impulses, make and execute plans and revise and adjust them when necessary. These skills begin developing early in life, but are malleable into adulthood. These skills are what allow us to set and achieve goals that are meaningful to us.

This guide takes practical solutions developed by executive function experts for use primarily in schools and adapts them for use in job search and human service programs. We have integrated various approaches into one comprehensive adaptable multi-step framework -- Goal, Plan, Do, Review and Revise (GPDR/R) that makes explicit the steps that lead to successful goal achievement.

Many stress factors, like living without enough resources to make ends meet, can compromise these skills and growing up in highly stressful environments can impact their long-term development. The good news is that we can design our programs to build on individuals' strengths and compensate for weak skills while simultaneously providing opportunities to strengthen skills over time through practice, practice and more practice.
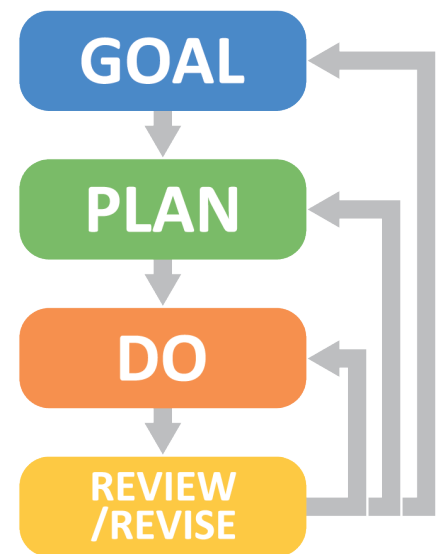
The Purpose of this Guide

This guide provides guidance for how human services staff can integrate the GPDR/R framework into existing programs, with a special emphasis on job search assistance programs. It is designed to introduce human services staff to practices that lead to successful goal achievement and provide concrete ideas for how to integrate those practices into existing programs. The strategies presented here can be used in individual meetings or group settings.

The GPDR/R framework works best when used in its entirety, again and again: set a goal, craft a detailed plan, put the plan into action, review progress and revise. As the figure on the previous page shows, each step builds on the last and leads to the next. For many programs, this process will seem familiar – and it is. What an executive function lens gives us is a more intentional way of guiding participants to successfully achieve their goals.

The Structure of this Guide

This guide is designed to provide you with: (1) background information that will help you to understand the link between goal achievement and executive function skills; (2) a specific (but adaptable) approach to goal achievement that builds on what we know about the factors that increase the likelihood that individuals will successfully achieve their goals; (3) specific tools that you can use to implement the framework in your program; and (4) group activities that you integrate into existing programs to teach and practice the use of the GPDR/R framework.

Table 1-1 below provides a raodmap to the materials presented in this GPDR/R Guide:

TABLE 1-1: GPDR/R GUIDE OVERVIEW	
The GPDR/R Foundation	
Chapter 1:	Provides an introduction, an overview of GPDR/R and what makes this framework different from current practice
Chapter 2:	Introduction to executive function skills and why they matter for goal achievement
Implementing GPDR/R	
Chapter 3:	Guidance for implementing ech component of the GPDR/R framework
Chapter 4:	Tools for staff to build their knowledge and expertise in implementing GPDR/R
Chapter 5:	Tools to use with participants to execute each step of the GPDR/R process
Chapter 6:	Activities to use in groups that strengthen skills leading to goal achievement.
Appendix	
Administering the Executive Skills Profile	

Preview: Goal, Plan, Do, Review and Revise

Goal, Plan, Do, Review, and Revise (GPDR/R) is a multi-step goal achievement framework that, *if practiced regularly and with fidelity*, will make setting and achieving goals easier – and more effective. If practiced enough, it can also help to build key executive function skills necessary for adult success. We will explore executive function skills more deeply in the next chapter, but in short, these skills are ones we use and need for future-oriented endeavors and everyday tasks that rely on planning, self-control, and monitoring skills. In addition to directly building skills, GPDR/R is designed to facilitate the development of supportive relationships and reduce stress, both of which play an important role in the development and use of executive function skills.

The steps of GPDR/R always happen in the same order:

- **Goal:** Set a goal – something an individual wants to accomplish and is within their reach
- **Plan:** Create a roadmap and action plan for how to achieve the goal and identify obstacles and solutions
- **Do:** Put the plan into action
- **Review & Revise:** Look back and assess progress; make a plan for moving forward

The GRDR/R approach to goal achievement focuses on the importance of facilitating a process that helps participants: (1) look to the future to identify something they want to accomplsh that is meaningful to them – something that will motivate them to make use of the rsources your program has to offer – and (2) helps them to create a path forward that maximizes their chanes of success. Creating that path forward requires helping them visulaize the future while simultaneously assessing their current situation to identify what steps they need to take to get to where they want to go and to plan ahead for what might get in the way. It recognizes that achieving our goals is not a linear process – it takes time and there will be inevitable setbacks along the way.

The GPDR/R intentionally builds on processes that employment and other human service programs already do every day, but approaches those processes differently. Key differences from regular practice include the following:

- Staff act as *facilitators*, *helping participants to set goals that are meaningful to them* and within their reach
- Goals are broken down into *small steps* that are achievable within the time available
- *Detailed action plans* identify when, where and how each task will be completed
- *Participants (not staff) identify potential obstacles and strategies for overcoming them before they occur*
- *Ongoing support* is provided when participants are putting their plans into action

- Regular meetings are *intentional and purposeful and focused on reviewing and revising goals and plans*

Effective implementation of GPDR/R rests on the following: (1) creating and supporting responsive relationships; (2) strengthening core life skills; and (3) reducing sources of stress. (See Table 1-2.) In the next chapter, we provide more detail on the skills that are necessary for successful goal achievement. Then, in the remaining chapters we provide more detailed guidance on how to effectively integarate GPDR/R into your day-to-day activities.

TABLE 1-2: EFFECTIVE IMPLEMENTATION OF GPDR/R
Create and Support Responsive Relationships
✓ Start with the future, not the past: What are your hopes and dreams? What can we do to help you identify and achieve them?   ✓ Put the participant in control: they decide what matters to them; what they want to achieve   ✓ Act as a facilitator – provide guidance; help participants identify their own priorities and solve their own challenges   ✓ Continue to provide support when participants are putting plans into action; encourage teamwork
Strengthen Core Life Skills
✓ Embed common goal achievement processes and language across all program components; use consistently   ✓ Model goal achievement processes whenever possible   ✓ Provide guidance to help participants break tasks down into small steps   ✓ Help participants develop and write down detailed action plans   ✓ Help participants to identify and develop solutions to obstacles *before they occur in the context of what they want to achieve*   ✓ Help participants monitor their behavior and actions and make adjustments based on what they learn
Reduce Sources of Stress
✓ Provide resources to help participants meet their basic needs   ✓ Set realistic expectations   ✓ Celebrate every success, no matter how small   ✓ Create an organizational culture that encourages workers to do their job differently   ✓ Reduce program complexity and smooth the path to success whenever possible

Chapter 2: GPDR/R and Executive Function Skills

Introduction

Executive function skills – also known as adult capabilities or executive skills-- are a set of skills that we use to set and achieve our goals.   They play a significant role in determining whether we succeed at school, parenting and work. Because goal achievement is effortful work, it places significant demands on our executive function skills. We can increase the chances of successfully helping our participants achieve their goals by reducing the demands on their executive function skills and building them through practice. We can reduce the demands on executive functions by modifying the environment (e.g., changing our expectations so they align with individuals' executive function skill strengths and weaknesses) or by modifying tasks to make them easier (e.g., reducing the steps it takes to obtain child care, helping people to fill out complicated forms). We can also reduce the demands on executive function skills by creating routines – like GPDR/R-- that we can use over and over again. Through repeated practice, routines require less and less effort – and they build skills in the process.
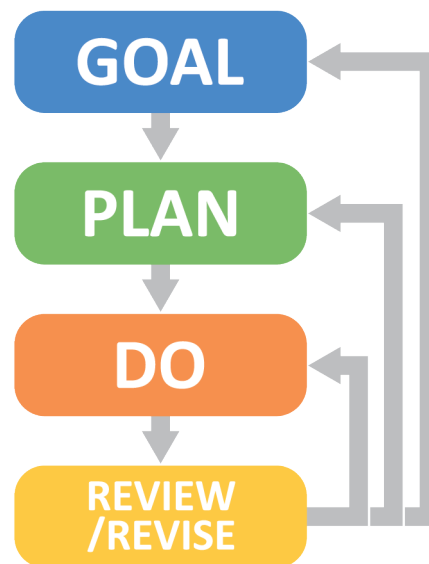
Executive Function Skills: What They Are and Why They Matter

A growing body of research highlights the important role that executive function skills play in helping adults achieve success in the workplace and at home.[1] They are the skills that help us to carry out day-to-day tasks and achieve life goals that are important and meaningful to us. They are the skills that help us plan, control our responses to things and monitor our actions. They also are the skills that we use to remember important information and follow multi-step processes or instructions. Executive function skills begin developing in early childhood and their

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[1] Center on the Developing Child at Harvard University (2016). *Building Core Capabilities for Life: The Science Behind the Skills Adults Need to Succeed in Parenting and the Workplace.* Retrieved from www.developingchild.harvard.edu.

natural development ends at about the mid-20's. However, they can be improved through practice and use throughout adulthood – and even into old age.

This introduction is intended to highlight the important role that executive function skills play in goal achievement, but you do not need to become an expert on executive function skills to effectively use GPDR/R. By implementing GPDR/R, you are encouraging the use of executive function skills, creating an environment that recognizes how easily these skills are taxed, providing support when they are weak, and building them through practice.

What are Executive Function Skills?

While there isn't one standard definition of executive function skills, most researchers agree they are a set of cognitive skills that help us organize and manage our resources and set and achieve goals, making them essential for adult success. As a starting point for understanding how we can use executive function concepts and principles to enhance the work of job search and other human service programs, we consulted with Dr. Richard Guare, a neuropsychologist and certified behavior analyst who has written numerous books on executive function with his co-author, Peg Dawson.[2] (Guare and Dawson use the term "executive skills" rather than executive function skills in their work. Because we draw so heavily on their work, we often use their terminology in this guide.) Their work draws on years of developing and implementing practical strategies to help children, adolescents and young adults with executive skill weaknesses to successfully set and achieve their goals.

Broadly speaking, the 12 skills that are the focus of Guare and Dawson's work (See Table 2-1) fall into three broad categories:

- *Planning.* Planning, organization, and time management are a set of related skills that help us to create a roadmap to get from where we are to where we want to go.
- *Self-control.* We rely on our self-control to follow the roadmap to where we want to go. Self-control requires consciously directing our actions and behaviors towards the future while controlling our automatic responses (such as fight or flight) which might take us off course. When we lack the resources we need to meet our basic needs, we tend to be very present-oriented, making it difficult to exert the self-control necessary to achieve future-oriented goals.
- *Monitoring.* Regularly assessing our behavior is what allows us to learn from our experiences and to make adjustments if things are not going the way we would like.

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[2] For example see, Peg Dawson and Richard Guare. *The Smart but Scattered Guide to Success.* New York, New York: The Guilford Press, 2016.

Table 2-1: Executive Skills Defined		
Planning and Prioritization Deciding what steps to take. The ability to create a road map to reach a goal or to complete a task. It also involves being able to make decisions about what is important to distinguish what is and is not important.	**Task Initiation** Getting started without delay. The ability to begin projects without undue procrastination, in an efficient or timely fashion.	**Stress Tolerance** Managing your stress. The ability to work in stressful situations and to cope with uncertainty, change, and performance demands.
Organization Knowing where I put things. The ability to create and maintain systems to keep track of information and materials.	**Response Inhibition** Seeing the consequence before I say or do something. The capacity to think before you act – the ability to resist the urge to say or do something allows us the time to evaluate a situation and how our behavior might impact it.	**Working Memory** Remembering what I did and what I need to do. The ability to hold information in memory while performing complex tasks. It incorporates the ability to draw on past learning or experience to apply to the situation at hand or to project into the future.
Time Management Know about how long a task will take and what the deadline is. The capacity to estimate how much time one has, how to allocate it, and how to stay within time limits and deadlines. It also involves a sense that time is important.	**Emotional Control** Keeping my cool when frustrated. The ability to manage emotions in order to achieve goals, complete tasks, or control and direct behavior.	**Metacognition** Evaluating how you're doing. The ability to stand back and take a bird's eye view of yourself in a situation, to observe how you problem-solve. It also includes self-monitoring and self-evaluative skills (e.g., asking yourself "How am I doing?" or "How did I do?")
Sustained Attention Paying attention, even when I don't feel like it. The capacity to maintain attention to a situation or task in spite of distractibility, fatigue, or boredom.	**Goal-Directed Persistence** Sticking with your goal. The capacity to have a goal, follow through to the completion of that goal, and not be put off or distracted by competing interests.	**Flexibility** Going with the flow, accepting change. The ability to revise plans in the face of obstacles, setbacks, new information, or mistakes. It relates to adaptability to changing conditions.

Table Key: Planning Skills, Self-Control Skills, Monitoring Skills

If you would like to learn more about your own executive skills and consider helping participants to identify their exutive skills strengths and weaknesses, you can use the Executive Skills Profile which is inlcuded in the Appendix, along with instructions for how to use it.

When integrating an executive skills focus into your program, it is important to keep the following in mind:

- All of us have executive skill strengths and weaknesses;
- Not all people who have lived in poverty have weak executive skills;
- Ongoing inequities based on gender, age, race, ethnicity and social standing may tax these skills and make successful goal achievement more difficult; and,
- When providing guidance and support, it is important to build on strengths as much as support weaknesses.

The Relationship between Executive Function Skills and Goal Achievement

Executive skills are important because they are the skills we need to direct our behaviors and achieve our goals. By better understanding the link between executive skills and goal achievement, we can more effectively target our limited resources to activities and actions that will best support program participants in setting and achieving their goals. As Table 2-2 shows and the information provided below illustrates, we use different skills at each phase of the goal achievement process.

Table 2-2: The Relationship between Executive Function Skills and Goal Achievement	
GPDR/R Component	**Executive Skills Most Relied Upon**
Goal	Metacognition, working memory
Plan	Planning/prioritization, organization, time management, working memory
Do	Task initiation, response inhibition, time management, sustained attention, working memory, flexibility, organization, persistence, stress tolerance, emotional control, cognitive flexibility
Review & Revise	Metacognition, working memory, flexibility

- **Goal:** We use working memory to remember past experiences and metacognition to evaluate those experiences. That's what helps us to come up with goals that are meaningful – we avoid things that we don't like and do more of what motivates us to move forward. Successfully helping a participant identify a meaningful goal requires helping people to identify what matters to them and what successes and strengths they can draw upon to maximize their chances of success.

- **Plan:** Our planning and prioritization skills are what help us to break goals down into the small steps. We use our organization skills to gather the resources we need to complete a task and to keep them in a place where we can find them. We use time management skills to help us estimate how long a task will take and to decide when we will do it. We draw on working memory to identify what else we need to do and to remember the steps so we can prioritize them. One of the most important things we can do when working with participants is to help them break big goals down into small steps that allow them to experience success from the very beginning of the process.

- **Do:** Executing a plan draws on many executive function skills, most of which involve practicing self-control to direct our behavior in a purposeful way. Task initiation allows us to get started on a task. Time management allows us to wisely use the time we have available. Response inhibition allows us to avoid distractions and stay focused on the task at hand. Sustained attention helps us to stick with a task until it is complete. Goal-directed persistence helps us to complete each step along the way until we've reached our goal and to stick with the goal even when the going gets rough. Stress management helps us to not get too overwhelmed when faced with competing demands and to proactively identify ways to reduce the stress in our lives. Emotional control help us to keep our emotions in check. When we encouter stumbling blocks, it is cognitive flexibility that allows us to problem-solve to keep us on track. Much of the responsibility for doing a plan lies with the participant, but providing continued reminders and support and encouragement can do a lot to help them stay focused on what they are trying to accomplish.

- **Review & Revise:** When reviewing our progress towards a goal, we once again draw on working memory and metacognition skills which help us to remember what we did (or didn't do) and why and assess what did and ddn't work. When revising a goal, we also draw on cognitive flexibility as that is the skill that allows us to abandon goals that are too hard or no longer meaningful to us and come up with new goals – or to develop a new plan if the previous one didn't produce the results we wanted. We also draw heavily on metacognition because we are digging deeper into what matters to us and using it to plan for the future. We often don't take the time to review with participants what they accomplished and to help them decide what they want their next steps to be.

Context Matters: How Living in Poverty Impacts Executive Function Skills

The development of and our ability to access and use our executive function skills are influenced by the context in which we live our lives. The impact of poverty on adults' executive function skills begins in early childhood and continues into adulthood. Understanding how poverty impacts the development and use of executive function skills provides important insights into why goal achievement can be so challenging for many human service program participants and helps to identify why using an executive-function informed approach to goal setting may lead to better outcomes. Here are four ways in which poverty impacts executive skills:

Exposure to high levels of stress in childhood. One of the hallmarks of living in poverty as a child is that it exposes children to high levels of stress caused by not having enough to eat, not having a stable place to live, or being exposed to violence, for example. When children experience too much ongoing stress – commonly referred to as toxic stress—it changes their brain architecture which impairs the development of executive function skills. This, in turn, can have a lifelong impact on their health and economic outcomes as adults.

Living under conditions of scarcity -- the "bandwidth" tax. Living without enough resources to make ends meet – under conditions of chronic scarcity—imposes a "bandwidth tax" which reduces the cognitive resources individuals have available to devote to activities aimed at achieving long-term goals.   Sendil Mullainathan and Eldar Shafir, authors of *Scarcity: Why Having Too Little Means So Much,*[3] note that when people live in a state of chronic scarcity, they have a tendency to "tunnel" which causes them to focus on the here and now. This reduces individuals' capacity to think logically, solve novel problems, and process information. It also diminishes their ability to evaluate options to make high quality decisions and impairs their self-control which can cause them to act impulsively.

Increased exposure to situations that compromise executive function skills. Living in poverty also puts individuals at greater risk of experiencing situational factors that impair their executive function skills. Those situational factors include stress, lack of exercise, lack of sleep, lack of social connections and poor nutrition.

Added complexity of accomplishing common adult tasks. Limited transportation and child care options, constantly changing work hours and schedules, unstable pay, and complicated processes for obtaining and maintaining public benefits all require highly developed executive function skills. It takes much greater planning, organization and time management skills if you have to get your kids to daycare and yourself to work via public transportation than via a car, for example.

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[3] Sendil Mullainathan and Eldar Shafir. *Scarcity: Why Having Too Little Means So Much.* New York, New York: Time Books, Henry Holt & Company, LLC. 2013

What Organizations Can Do

Recognizing the toll poverty takes on adults' executive function and self-regulation skills provides a starting point for redesigning employment and human service programs to achieve better outcomes. There are many steps organizations can take to redesign their approach to service delivery including:[4]

- ✓ Support staff as they work to build supportive relationships that activate participant motivation and commitment to change.
- ✓ Train staff to be coaches or facilitators, not compliance officers.
- ✓ Set realistic expectations for program participants.
- ✓ Streamline and simplify processes.
- ✓ Create a welcoming and calm environment.
- ✓ Modify tasks to reduce the demand on individuals' executive function skills.
- ✓ Address issues that impair executive functions such as stress, lack of connections and lack of exercise.
- ✓ Create routines that help individuals to set goals and prioritize how to deploy their attentional resources to achieve them.
- ✓ Provide opportunities for participants to practice using their executive function skills in real-life situations.
- ✓ Work on explicitly building executive skills by providing regular opportunities to train them, challenge them and practice them in the context in which they will be used.

Organizations also can reduce the toll poverty takes on individuals' executive function skills by reducing the amount of scarcity with which individuals must contend. Providing income support and transportation, child care, and housing assistance can all reduce scarcity.

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[4] For additional information, see: Center on the Developing Child, Harvard University. "Building the Skills Adults Need for Life: A Guide for Practitioners."

Introduction

GPDR/R is an approach, not a program, which means that it can be integrated into any human service program. But, putting GPDR/R into practice requires that we do our work differently. In particular, it requires that we let participants drive the process and that staff take on the role of facilitator – helping participants to identify what matters to them and helping them to see how they can use the program resources to reach (or come closer to reaching) their goals. In piloting this work, staff reported that, when asked what their goals were, participants often responded by saying that no one had ever asked them that before. Doing this work requires more listening and less telling people what to do.

GOAL

PLAN

DO

REVIEW /REVISE

In this chapter, we provide key concepts for implementing each component of GPDR/R effectively. In the remaining chapters, we provide tools that staff can use to facilitate the integration of GPDR/R into their work.
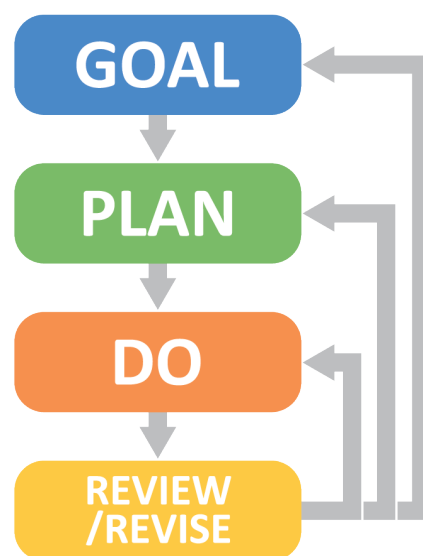
Goal: Looking to the Future

Goal setting is at the heart of many human service and employment programs. It is the process of identifying something we want to achieve so that our actions can be directed to that aim. Setting goals anchors us to the future, building the motivation that gives meaning and purpose to each of the steps we need to take to get where we want to go. In short, goals are what give direction to our actions – and to our lives. Human service workers play a key role in

> **Your Role as a Facilitator**
>
> - Guide participants to a heartfelt, achievable goal
> - Guide participants to imagine what success looks and feels like

creating relationships that activate client motivation and the commitment to change.   Program staff act as facilitators, guiding program participants through a process of self discovery, resisting at every turn the urge to set goals for participants and to tell them how to achieve them.

Key Concepts for Effective Goal Setting

Setting goals is about imagining what we want our future to be. To that end, effective goal-setting is a mixture of both science and art. The science tells us the best way to identify goals that we have the greatest chance of achieving: they must be meaningful and achievable. But, every individual is different. Helping people to get to a meaningful goal that is challenging, but feasible is the art of goal setting. It is about figuring out how to help participants look to the future and find something that matters enough to motivate them to put out the effort required to achieve it. Here is a summary of the characteristics of goals that have the greatest chance of being achieved:

- ✓ *Personally meaningful and motivating.* When we come up with our own goals, we are more likely to be motivated to stick with them to the end. If they are not meaningful to us, we will abandon them when the going gets rough. Building motivation is about looking into the future and imagining what it will feel like to achieve the goal.
- ✓ *Within our control.* Even though we can only cntrol so much in our lives, often we set goals that are reliant on factors outside of our control – and encourage others to do the same. For example, "get a job" is dependent on things like your skills and experience, the economy and where you live. An *in-our-control* employment-related goal would be something like "apply to five jobs at nursing homes I can reach by public transportation."
- ✓ *Challenging, but feasible.* If goals are too easy, they are not motivating enough for us to stick with them. If they are too hard, we abandon them out of frustration.
- ✓ *Specific.* We are more likely to achieve our goals if they are specific, which means that we have a clear target for which we are aiming. "I want to get a job" is a vague goal. "I want to apply to five jobs at nursing homes within 15 minutes of my house by the end of the month" is a specific goal.

"But experience has taught me that you cannot value dreams according to the odds of their coming true. Their real value is in stirring us the will to aspire. That will, wherever it finally leads, does move you forward. And after a time you may recognize that the proper measure of success is not how much you've closed the distance to some far-off goal but the quality of what you've done today."

From: Sonia Sotamayor, **My Beloved World.**
New York: Alfred A. Knopf, 2013.

Plan: Creating a Roadmap for Change

Human services staff can help participants become really good planners – a critical skill that is at the core of successful goal achievement. A well-crafted, detailed plan works as a self-control device; research shows that individuals are much more likely to follow through with a task (which often means ignoring competing demands) if they have written down the details and have identified and thought through

Your Role as a Facilitator
• Model and teach how to develop an effective plan
• Help participants to write down the details: what, when, where, how, what to take
• Practice planning as often as possible
• Help participants identify obstacles and solutions
• Develop ready-made plans for common tasks

how they will respond to obstacles *before* they occur. Staff can simplify the planning process by thinking through the steps ahead of time for common tasks. Key to teaching planning is following the same process every time and repeating the process over and over again.

Key Concepts for Effective Planning

The task of creating a roadmap to reach a goal, making decisions about what is most important, estimating how long each step will take, thinking ahead about what could go wrong requires a lot of effort. A good plan can significantly reduce the demand on a participant's executive function skills thereby increasing the chance that they will follow through with completing the plan.

Key to helping participants develop strong planning skills is developing a systematic approach to planning and using it over and over again. Participants who experience a repeated process are more likely to use it on their own. Key concepts for effective planning include the following:

✓ **Start with th future.** Meaningful goals are what motivate us to take the steps necessary to achieve them, but planning is what makes them real. When making plans it is important to show how each step links to the goal. A key role for staff is helping participants see how program resources (and requirements) can help them reach their goal.

✓ **Break bigger goals into small manageable steps.** Achieving long-term goals can seem like an impossibility. One way to make them not seem so far off and complicated is to break them down into small, concrete steps.

✓ **Identify the resources needed to complete the plan.** Effective plans not only identify the steps that we need to take, but also the resources we need to be successful. For example, to apply for subsidized child care, program participants need a copy of their child's birth certificate.

- ✓ **Pay lots of attention to details.** Effective plans not only identify next steps, but also include the details of how those steps will be completed, inlcuding how long it will take, when and where it will be done, how you will get there, what resources to take and strategies ofr overcoming obstacles that might get in the way.
- ✓ **Write plans down.** We are more likely to follow through with plans if they are written down and rehearsed before they are acted upon.
- ✓ **Streamline action plans** so they have as few steps as possible -- three steps is ideal (but may not always be feasible).
- ✓ **Create ready-made plans for common tasks** to reduce the planning burden on participants. This immediately reduces the cognitive demands on a participant, freeing up limited resources to complete tasks that can help to propel them forward.
- ✓ **Complete some steps together.** This can cut down on the burden for the participants, while also giving them a model of how to get started on tasks that may be difficult for them.

Three Steps for Creating Effective Plans

Step 1: Create a Roadmap: Backward Mapping

Backward mapping is a process you can use with participants to help them break big goals down into smaller steps. It is called backward mapping because you starting with the goal as the end point and work backward to figure out how to get there.   The three key steps are:

- ✓ Identify and visualize the goal
- ✓ Identify the steps to get there
- ✓ Identify the resources needed to complete the steps

Plan Backward   *End*   →   *Start*

Resources I Need
List the materials, websites, phone numbers, or documents that you'll need for each step.

Steps to Get There
What are the steps I need to take to achieve my goal?

My Goal!
(Draw or insert picture here)

Target date for completion:

Start   **Execute (Do)**   *End*
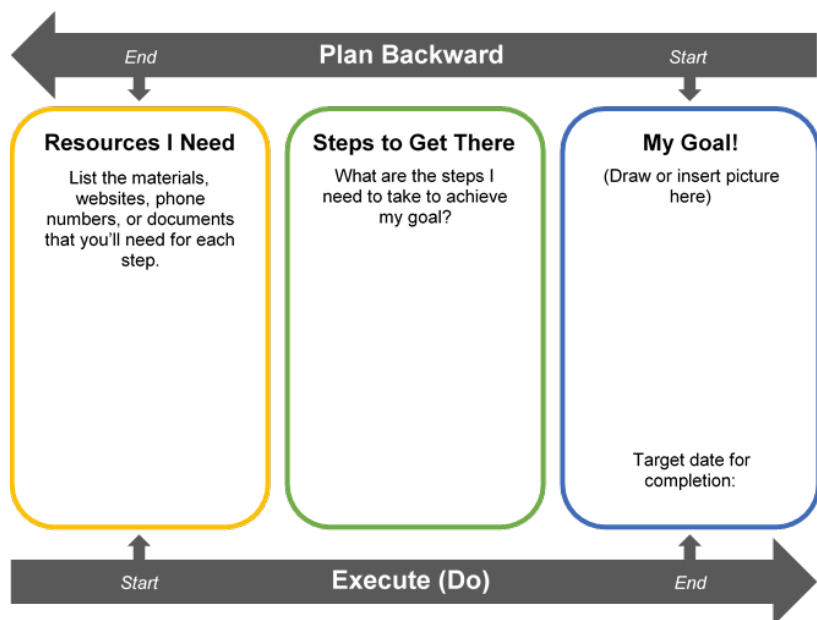
You plan backward and execute forward. (More detailed instructions for doing backward mapping can be found in Chapters 5 and 6.)

Step 2: Make the Plan Actionable

Making a plan actionable involves creating a detailed action plan for the steps that will be completed in a specified time period (e.g., the next week or month). Good planning also involves walking through the action plan with the participant, having them visualize the steps and identifying when/where/how they will complete them. It is important that staff works through the plan *with* the participant, but does not do the planning *for* them. (Chapter 4 has two options for a form to use with participants, one traditional and one visual.)

Step 3: Identify Obstacles and Strategies for Addressing Them

An important part of developing an effective plan is anticipating obstacles and developing contingency plans to address them. This puts responding to obstacles on "auto pilot" rather than crisis response. It's also important to note what constraints are within a participant's control and what supports the program can provide, with a focus on compensating for executive function skills that might be weak.

Do: Put the Plan Into Action

Executing the plan for our goal is when we move from *intention* to *action*, and is when participants often have the least amount of direct support. Programs set participants up for success by creating detailed plans, thinking through potential potholes and detours along the way, and rehearsing plans before they get put into practice. The responsibility for "doing" the plan rests primarily with the participant, but you can still

Your Role as a Facilitator
• Create realistic expectations.
• Simplify tasks to make them easier
• Provide reminders
• Teach participants to set their own reminders
• Anticipate obstacles
• Rehearse difficult situations
• Provide time to teach and practice skills needed to successfully execute plans

help to increase their chances of success. Doing the plan is all about self-control – it is about directing one's behavior towards achieving one's goals – and that means not getting derailed by all the things that can easily distract us from staying focused on what we are trying to achieve.

Key Concepts for Supporting Participants as They "Do" Their Plan

The "Do" phase of the GPDR/R framework asks people to draw on many of their executive function skills and also is the step with the least direct support. While staff often cannot be with participants while they are executing their plans, there are several concepts programs can keep in mind when approaching the "do" phase:

- ✓ **Design programs to minimize the burden on participants.** Programs can be redesigned by making tasks easier (fewer steps, centralized locations, etc.) and reducing the demand on participants' time, resources, and mental energy (having meetings in the same place each time on a regular schedule).
- ✓ **Provide direct support.** Programs can help participants identify areas in their where they are most concerned about not being able to successfully complete their plan and provide direct support and encouragement in overcoming those. For example, if a participant often struggles with remembering to get to meetings on time and that is an integral part of his/her plan, staff may provide reminders about the meeting or help set up automatic reminders in an app on a participant's phone.
- ✓ **Recognize the importance and power of "small steps."** We often expect participants to accomplish complex tasks (e.g., participating in work activities for 20 or 30 hours per week) immediately, even while recognizing that they are unlikely to succeed. For individuals who are in crisis or who are facing a number of challenging situations simultaneously, the best path to long-term success may start with small steps that reduce stress and build the confidence and skills to take on bigger, more challenging tasks down the road.
- ✓ **Build participant capabilities.** Since many programs are time-limited, it is important to model and teach skills to participants in a supported environment, so that when they leave they have built their own capabilities to achieve goals and execute plans.
- ✓ **Provide opportunities to practice.** Executive function skills are built through practice, over time. Programs can design their programs to provide participants opportunities to practice skills. Group workshops and ongoing activities like work experience or subsidized employment provide ideal opportunities for participants to practice executive function skills.

In Chapter 4, we provide a guide that you can use to support participants in five key areas as they do their plans. Some of these strategies aim to provide direct support while participants are doing their plans while others suggest additional ways you can help build participant capabilities before they begin or while they are doing their plans. The five areas and the executive skills represented by each are:

- ✓ **Remembering what needs to get done** -- working memory
- ✓ **Getting started and sticking with it until its done** -- task initiation, goal-directed persistence
- ✓ **Managing time and staying organized** -- organization, time management
- ✓ **Managing stress** -- stress tolerance and emotional control
- ✓ **Avoiding distractions and competing demands** -- response inhibition

Review and Revise: Looking Back, Moving Forward

Achieving goals is an iterative process. It is not uncommon for us to set our sights on a goal and then decide it's not the right goal after all. Similarly, our plans don't always work as well as we hoped. It is for these very reasons that review and revise are included as explicit steps in the goal achievement process. By including them from the beginning, changes become a regular part of the process and are less likely to be viewed as failures.

Your Role as a Facilitator
• Provide an environment that supports changing goals and plans as often as necessary • Focus on the positive, but recognize when participants' actions fall short of expectations • Make reviewing and revising goals and plans routine • Build in time to regularly assess progress • Encourage self-reflection

Though reviewing and revising plans often happens during the same meeting, they are separate processes that deserve their own time and attention. When we take a step back to review our progress and to think about what worked well and what we could do differently, we are building critical skills to use throughout the goal achievement process. When we reflect on what we accomplished (or didn't), we develop a better understanding of ourselves which allows us to build on our strengths and develop more effective strategies for overcoming our weaknesses. It is not enough to simply review how we did, we need to use what we learned to keep moving forward towards something that matters deeply to us. The more you encourage participants to review their progress and make changes when needed, the more likely it is to become a process they do regularly on their own.

Key Strategies for Guiding the Review Process

We often don't feel we have the time to pause and review what we or our participants accomplished, but it is critical to help us guide participants towards success and to help our participants to assess their own circumstances, actions and behaviors. General "review" questions you can use inlcude the following:

- *Tell me how [the week] went.*
- *What is something that you accomplished that you are especially proud of? What helped you to be successful?*
- *What is something you wanted to accomplish but didn't? What got in the way?*
- *What is one or two key things you learned about yourself that you'd like to keep in mind for the future?*
- *Let's review what you had planned for the [week] and assess your progress.*

Key Strategies for Revising Goals and Plans

The revise process is critical for helping participants to stay motivated and to keep momentum going. In facilitating the revise process, you will use the information you gathered during the review conversation to help guide the participant to the next step which will depend on what the participant accomplished and whether they remain committed to their original goal (or have accomplished it and are ready to move on to a new goal).

Depending on what you uncover during the review process, the revise step could take one of three paths:

- ✓ *Development of updated action steps.* If an individual successfully executed their action plan, you want to help them identify the next steps they need to take to make progress towards their goal. This might mean identifying what the next steps are to continue to make progress, or continuing what they are currently working on. In both cases, you are building off of an existing plan that is working as intended.
- ✓ *Development of a new plan.* If an individual wasn't successful in completing their action plan but they want to stick with their current goal, you want to work with them on developing a new plan. Do they need to take an alternative approach? Do they need to break tasks down into even smaller steps? Do they need more support or a different kind of support?
- ✓ *Identification of a new goal.* Through the review, a participant may also come to the realization that the goal is too challenging, not meaningful enough to them, or not feasible. In this case, you want to work with them to come up with a new goal, then restart the GPDR/R process. A participant may also reach their goal. In that case, you want to encourage them to set a new goal, possibly one that may be a bit more challenging.

Questions you can use to guide the "revise" conversation include the following;

- • *Given what you've accomplished and what you've learned about your strengths and limitations, how are you feeling about the goal you set for yourself? Does it sill feel meaningful to you and within your reach?*
- • *What would you like to do next? (Aditional prompts: Would you like to come up with a new goal? Go back to your plan and revise it? Move on to the next step on your plan?*

Once you've figured out the direction the participant would like to take, you simply repeat that part of the GPDR/R process and move forward from there.

Chapter 4: Staff Guides to Support GPDR/R Implementation

Introduction

In the previous chapter, we reviewed strategies for implementing each phase of GPDR/R. In this chapter, we provide you with a set of guides that can help you to effectively integrate GPDR/R into the work that you do. We start with a series of guides that focus on how to be an effective facilitator and how to integrate adult learning principles into your work. We then provide several staff guides that are specific to implementing GPDR/R. You can think of these guides as a set of "cheat sheets" that you can refer to as you are implementing GPDR/R. You can select the guides that you think will be most helpful for integrating GPDR/R into your current practices.

GOAL

PLAN

DO

REVIEW /REVISE
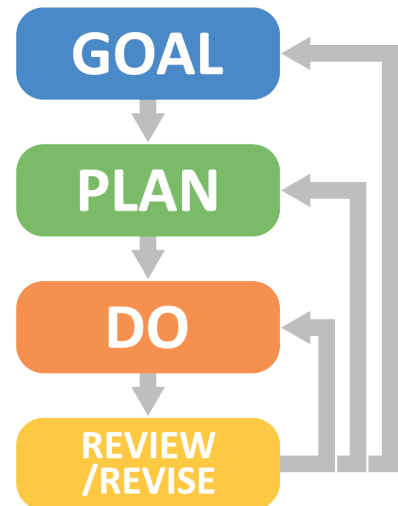
Staff Guides: Facilitation and Learning-Centered Approaches

The Role of Facilitation: Inviting Connections I Page 23

Summary: Creating supportive relationships is a core principle underlying the GPDR/R framework. This guide provides an overview of how you can use your role as a facilitator to help invite connections with participants and build supportive relationships that will provide a strong foundation for implementing the GPDR/R framework.

Five Adult Learning Principles I Page 24

Summary: Adults learn in their own unique ways. This guide provides five adult learning principles you can use to help participants learn what they want/need to learn. GPDR/R framework.

Facilitation Tips I Pages 25-26

Summary: Successfully implementing GPDR/R requires assuming the role of a facilitator which may be quite different from the way you currently do your work. Some of us have been trained tell people what they must do and give them lots of advice on how to fix all the issues they face. Effective facilitation requires us to free ourselves of this mindset, and adopt a new one. This guide provides tips on how to be an effective facilitator.

You can find additional information in the "Learning-Centered Design" section of Global Learning Partner's downloadable resources. They suggest starting with the resource on How a Learning-Centered Approach Differs.

The Role of Facilitation | Inviting Connections

If we go back to its Latin root, the word "facilitate" means "to make easy." As facilitators, we "make it easy" for people to connect with themselves, with each other, and with the content of the learning. The graphic below is a helpful image to keep in mind when checking both the effectiveness of our work as facilitators. As you consider how to integrate GPDR/R into your work, consider how your approach facilitates participants' connections to themselves, to others, and to the content.

Learning By Inviting Connections
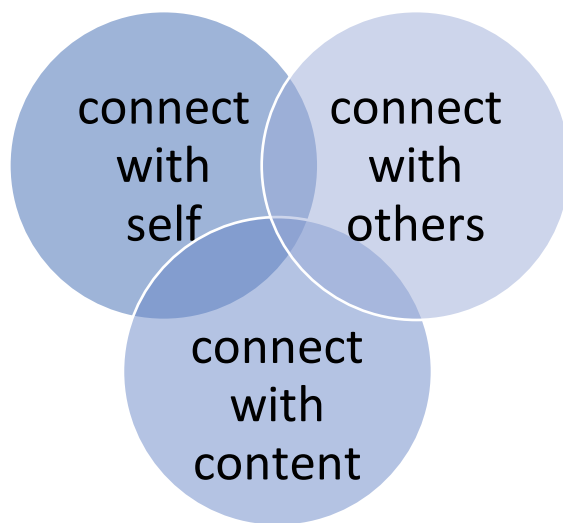
Connect with self. Learners need to reflect on their existing knowledge or experience. They need to compare what is being offered to what they already do -- and decide if they like it. Whether adult learners show it or not, they are internally weighing what they here and see, checking for themselves whether they believe it is right and true, and seeing how it feels.

Connect with others. Learners need to share their stories, experiences, thoughts and questions with other learners. They need to hear what others think and debate it. It is through the pushing and pulling that learners can sometimes discover new meaning and understanding for themselves. It is by holding up a mirror that clarity is sometimes found.

Connect with the content. Learners need time to examine new content. They need to decide how they feel about it and how it compares to what they already know. If they are learning a skill they need try it out. Learning is in the doing and deciding, and this takes time.

Source: **Global Learning Partners**

Five Adult Learning Principles

GPDR/R builds on an approach that we call "learning-centered." This approach shifts the focus from teaching to learning. In short, it asks us to think less about what we want to teach or tell to people, and more about how we can support them to learn what they want / need to learn. The shift is subtle but powerful. You are probably already using many elements of a "learning-centered" approach without necessarily calling it that!

At the heart of the approach are five core principles. An acronym helps keep these principles top-of-mind: REACH | Relevant, Engaging, Actionable, Clear, and Holistic. Below are a few words on each principle, and their relevance in the GPDR/R context.

An Introduction to REACH™ and Its Relevance to GPDR/R

RELEVANT | A relevant participant meeting (individual or group) focuses only on what matters most to participants' right now. A relevant meeting uses language and images that participants can relate to. A relevant meeting doesn't include content that doesn't matter to the majority of the learners at this point in their journey.

ENGAGING | In an engaging meeting, participants are not just expected to complete forms or passively listen to a lot of information. Instead, they have ample opportunity to share their own priorities, challenges, and insights.

ACTIONABLE | Effective teaching supports people to take action (i.e., goes beyond "taking in" information to actually "taking action" with that information).

CLEAR | An effective meeting uses language, examples, and directions that are extremely easy for the user to take in, and work with. Plain language and visuals are used throughout.

HOLISTIC | The teaching addresses the learners' head (ideas / thinking), heart (feelings / emotions), and hands (abilities / actions).

REACH™ was developed by and is a registered trademark of Global Learning Partners. You can find additional resources, including more on facilitating group workshops at this link.

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Facilitation Tips (1)

In this guide, we introduce you to three core facilitation skills -- followed by a series of practical suggestions for facilitators. GPDR/R will be most impactful in the hands of thoughtful facilitation. How you lead the learning in the moment—brings GPDR/R to life. We hope that the core facilitation skills mentioned here resonate with you -- and that the suggestions serve as a reminder of all the effective ways you facilitate learning. As you read this section, reflect:

- *What do you see as your greatest strengths as a facilitator?*

- *What is one thing you really appreciate about your own facilitation approach that is not mentioned here?*

Three Core Facilitation Skills

Listening | It sounds obvious, but listening is one of the most difficult facilitation skills. Authentic listening requires an open heart and focused attention, and that is hard when we are thinking about the clock or the next thing we want to say! Listening involves hearing each person's unique contribution, rather than assuming you know what people will say. *Does your body communicate that you are listening? Do your questions communicate genuine interest and curiosity in what a learner has just said? Do your words demonstrate that they were heard?*

Waiting | All facilitators ask questions. But, many also answer their own questions! Typically, when there is silence in a room, facilitators say something to fill the space. But, waiting is important. As a facilitator, give people time to THINK before they talk. Waiting creates safety— learners come to know that you will wait for them and it is okay!

Affirming | Participants can feel uncomfortable and unimportant when their comments or questions are met with silence. Affirmation let's people know that their input is truly valued. Affirmation can come in many forms -- do it in a way that feels natural for you. Voices are like oxygen to a dialogue approach to learning. They are required for survival! Be especially attentive to affirmation early on in the conversation; learners will be keenly aware of how you receive their first comments.

Practical Suggestions

- ✓ Assume a listening posture. Sometimes our posture, including having a computer screen or even a desk between you and the participant, creates a distance between you and the participant that is often unnecessary. Think about what position you would most want someone to be in if you were going to have a heartfelt conversation with someone.

- ✓ Make it a conversation between equals. For example, if you share a story about your own hopes and dreams, tell a true story and keep it short. Modeling what you hope the participant will do will ease their comfort of sharing things that are important to them with you.

Facilitation Tips (2)

✓ Teach with **confidence and credibility**. Adults know immediately if a facilitator is ill-prepared in a process they are leading, or lacks first-hand knowledge about a topic. If you don't know the answer to a question, it's okay to say you don't know and you'll find out. This is good facilitation.

✓ Ask **open questions**, rather than only closed questions, throughout the interaction. Open questions invite people's own ideas and reactions, whereas closed questions have right/ wrong or yes/ no answers. For example, a closed question would be: *Are you ready to sign the form saying you understand the program rules and you are committed to following them?* , and an open question would be: *Which of the program rules do you think might be most difficult for you and why?*

✓ Refer to the **participant's previous comments and stories** whenever the opportunity presents itself. For example, earlier, I recall that you mentioned how important your sister is to you; how might she be supportive of you and your plans over the next two weeks?

✓ Encourage **dialogue and debate**. Wait at least five seconds after asking a question (longer if it is a tough question). Acknowledge divergent points of view, and the courage it takes to bring them forward, even if you disagree. For example, you might say "Thank you for saying what's on your mind and heart. It's a sign that we're creating a safe space here, and that's important to us."

You can find more facilitation tips at the "Facilitation Skills and Issues" section of Global Learning Partners' Downloadable Resources. We suggest beginning with the resources on Open Questions, 10 Tips for Effective Facilitation, and Ensuring Safety in Your Learning Events.

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Staff Guides: Implementation of GPDR/R

The Language of Goal Achievement I Page 28
Area(s) of Focus: All Areas

Summary: This guide will help you to facilitate conversation with participants around goal achievement. You can use whichever part of the guide is relevant for the focus of your conversation. Reviewing the guide before each encounter with a participant will help you to become more comfortable with the GPDR/R approach to goal achievement.

Tips for Effective Goal Setting I Page 29
Area(s) of Focus: Goal

Summary: This guide provides tips for how to be effective in helping participants to set a goal. You can use this guide as a checklist when working with a participant to identify a goal.

Trouble Shooting When Goals Aren't Easily Identified I Pages 30-31
Area(s) of Focus: Goal

Summary: This guide provides tips for how to address different situations that might arise when helping participants set a goal.

Apps to Help Participants Stay on Track I Page 32
Area(s) of Focus: Do

Summary: This guide provides a list of free apps that can help participants with smartphones stay on track. You should familiarize yourself with an app before you suggest it to a participant, unless you are comfortable exploring how it works together. You could offer an optional workshop for participants with smartphones that want to learn more about how they can use them to reduce their burden.

Support Strategies As Participants "Do" Their Plans I Page 33-34
Area(s) of Focus: Do

Summary: This guide provides idea for how you can support participants when they are doing their plans.

The Language of Goal Achievement

A critical part of supporting people through the GPDR/R framework is changing how we talk about goals, plans, and next steps. The following are some prompts you can use to help facilitate a goal-achievement conversation:

GOAL
- What are your hopes and dreams for the future?
- Thinks about the next month. What is one thing you'd like to do that would make you feel happy -- that you've done something that is important to you?
- What is one thing that you would like to do to make your life feel better?
- What matters deeply to you that you could see yourself working towards in the next month?
- What keeps you motivated even when things get hard?

PLAN
- Let's work backward and think about what steps you need to take to get where you want to go. What resources you will need?
- Let's map out an action plan for the next week. What steps will you take? When will you do each step, how long do you think it will take, where will you do it, how will you get there?
- Imagine doing your plan. What might get in the way? What can you do if that happens?

DO
- Let's create a reminder system to help you put your plan into action.
- How can we support you as you move to the next step in your plan?
- It can be hard to do this alone—who might be able to help you with your next steps?

REVIEW
- Tell me about how your week went. What were your major accomplishments? What went according to plan? What strengths did you draw upon?
- What got in your way? How did you respond?
- What do you wish you had done differently?
- What did you learn about yourself?

REVISE
- How are you feeling about your goal? Does it still feel like something you want to pursue?
- What step would you like to take next?
- What would help you to move forward?
- How can I support you in coming up with a new plan or goal?

Tips for Effective Goal Setting

Start with the future. Employment programs often start the goal setting process by having participants assess their current situation or examine their past experiences. The research on effective goal setting suggests a different approach – start with the future. Start by having participants think about something they want to accomplish -- something that matters to them. You can use the language "Tell me about your hopes and dreams" to get a conversation started.

Start with a realistic (short) time frame. Participants often are stumped when we ask them what their ideal job is or where they'd like to be five years from now. A more effective strategy is to ask them to set a goal they can accomplish in a much shorter time horizon (as little as 24 hours). For example: What is something meaningful to you that you would you like to get done today (or tomorrow, by the end of the week, within a month)?

Start with smaller goals. Participants may not be immediately ready to identify and take on a big goal. One way to get participants started on a goal achievement path is to start small, by helping them identify a small goal they believe they can achieve (but is still a little bit challenging). When participants experience early successes, they become more confident about tackling more challenging or unpleasant tasks later. For example, instead of asking participants to do 20 hours of job search immediately on their own, you could ask them to apply for just one job each day or to spend one hour each day on job search tasks.

Visualize the Outcome. It is not enough for people to simply name a goal – they need to visualize it so they can see it and feel it. Visualizing allows the participant to imagine that the goal has already been achieved. It is what creates a link between an individual's present reality and their future. It helps to make the goal feel real and builds motivation to achieve it.

Write the goal down and/or share it. Writing a goal down helps to further embed it in our mind and increases the chances we will achieve it. Publicly sharing it further increases our commitment to completing the goal, but people should be invited, not forced to share their goal. Sharing a goal of your own can help participants to recognize that setting goals is something we all do.

Display the goal in a prominent place. You can encourage participants to post their end goal in a prominent place as a reminder of "why." This can help keep participants motivated when they are doing tasks that are hard or don't have an immedaite payoff – and don't seem relevant to what they want to achieve.

Trouble Shooting When Goals Aren't Easily Identified (1)

Goal-setting can be a hard process for some people, especially those living in situations of scarcity and stress. Here are common situations you may encounter during the goal setting phase and strategies to stay on track:

Trouble Naming a Goal

If participants are having a hard time coming up with a goal they want to achieve, you may need to help them expand their thinking or give them a timeframe or other parameters to think about. You may use the Goal Storming worksheet (Chapter 4) to help brainstorm ideas for hopes and wishes they have in their lives. You may also use the following graphic or the Life Areas Worksheet with examples (Chapter 4) to engage them in a conversation about common life areas in which we often set goals:

Health & Wellness   Legal Issues   Safety   Stress   Financial

Child Well-being, Care & Parenting   Education & Employment   Family, Friends & Relationships   Food, Shelter & Clothing

A Participant is in Crisis

When a participant is experiencing a crisis, you can use resolving the crisis as an opportunity to build problem-solving skills using the goal achievement process outlined here. For example, the goal for someone being evicted tomorrow might be to resolve the situation that is leading to the eviction or finding another place to stay. When participants are experiencing a crisis, it is still possible (and advisable) to act as a facilitator rather than a fixer. Whenever you guide someone to identify their own goal related to resolving the crisis and a plan for how to get there, you are helping them build skills that they can use in the future – including when future crises arise.

Trouble Shooting When Goals Aren't Easily Identified (2)

Unrealistic Goals

Participants may be very excited to have someone ask about (perhaps for the first time) their hopes for the future and may name goals that seem unrealistic for the given time frame or for their current skill level or situation. It's important to let the participant come to that conclusion on their own. Even if you feel the goal cannot be achieved, encourage them to visualize the outcome and help them to map out all the steps it will take to achieve their goal and how long each step will take. During this process, the participant might see that they will not be able to achieve the entirety of their goal during their time in the program but could focus on a smaller intermediate goal while working towards their larger future goals. They may also get started on a goal and only realize after they get started that it is unrealistic – or that it really isn't that meaningful to them after all. While that might not seem useful, it is an important part of participants learning about themselves and helping them to increase their sense of agency that makes them feel they are in control of their own life.

Goals that are Outside the Scope of the Program

Participants may come up with goals that are outside of the scope of your program. It is almost always possible to identify ways in which the program can help people to achieve some part of their goal. For example, if a parent's goal is to take their kids to an amusement park or other special outing, you can help them to identify ways in which they can earn and save money to achieve that goal. Anchoring program activities to an individuals' goals helps to provide the motivation they need to participate and to see how the program can help them to accomplish things that are important to them.   It might take some thinking outside the box, but there is almost always a way to link the services you provide to an individual's goals.

Multiple, Unrelated Goals

Often, participants have needs in multiple life areas and may have trouble prioritizing one goal to work on at a time. Using a tool like Goal Storming (Chapter 5) may be most effective in having participants list out, in no particular order, the things they want to work on, and then choose their top 2-3 goals, then continue to narrow it down to the one that they want to tackle first. You can help guide them to pick one that feels most important to them, while ensuring them that you can work on the others over time.

Apps to Help Participants Stay on Track

Even with the most detailed plans, it can be hard to turn our intentions into actions. While facilitators can give reminders and support along the way, it's sometimes helpful to have some apps handy on your phone/tablet/computer that keep keep participants going when it's time to put that plan into action. Here are some tried and true apps for staying on track:

Google Keep: Think sticky notes for your device! Great for taking quick notes that sync across your devices. You can also pin important reminders or lists to the top of the screen and set reminders (one-time or recurring) for those things you *really* need motivated to get done. You can also add photos to any note and color-code them (Android and iOS). *Free*

Unstuck: Made for iPad or to use on a computer, Unstuck helps when you're in a specific situation where you feel like you aren't making progress. This can be helpful when you hit a pothole, need an outside perspective, or just feel like you aren't moving from one step to the next easily and need a few tips to get moving. *Free*

Transit: Transit shows public transportation options, combined with bike sharing and car sharing, allowing people to consider and understand the options for traveling to a destination. Great for making sure you get to the next place on time and stay on a smooth timetable (Android and iOS). *Free*

One Big Thing: This simple app helps you identify a single priority to work on each day, instead of having long to-do lists to look through. You can also name small things you want to achieve once you complete your "one big thing". Available on iOS. *Free*

Aura: Recently, executive function experts have made the connection between practicing mindfulness and an increase in executive function capabilities. The Aura app is full of short (just 3-5 minute) micro-meditations that you can actually stick to doing regularly. The app reminds you to practice every day based on your habits and time preferences and even assesses your stress level and positive outlook. (Android and iOS) *Free*

Plan it, Do it, Check it off: Only available for iOS, but this is a great way to visualize your to-do list. Each step uses a picture (your own or one from their gallery) that you can check off when it's done. This can be a great way to enhance your backward mapping! *$2.99 one-time purchase*

SUPPORT STRATEGIES AS PARTICIPANTS "DO" THEIR PLAN (1)

Remembering What Needs to Get Done

- *Provide regular reminders.* In addition to participants' own reminder systems, you can support them by sending reminders – through phone calls, text messages, e-mails or letters. Sending reminders will also send a signal that you are there to support them as they work to achieve their goals.
- *Walk through the action plan at the end of the planning session.* By walking through the plan at the end of the session, you can make sure that the participant is clear about what they need to do and you can take one last opportunity to address any concerns and/or identify strategies to remove barriers that might get in the way. Check to make sure that the participant has the resources they need to do the plan, they know how to get started, the time commitment is reasonable and they feel confident they can complete the plan.
- *Encourage participants to post their goal in a prominent place.* One way to keep a focus on those goals is to ask participants to post them in a prominent place. Another is to revisit them in every interaction you have with a participant.

Getting Started and Sticking With It Until It's Done

- *Provide lots of encouragement and feedback.* Job search, applying for benefits, finding child care and related tasks are often stressful. Rejections, or silence, from employers come far more often than job offers. Applications are often long and ask the same questions over and over. It is critical to provide positive encouragement and feedback as often as possible. Recognition for progress or sticking with a task after multiple setbacks are the kinds of situations that are worthy of positive recognition.
- *Encourage teamwork.* The lack of social connections takes a toll on a participants' ability to use their executive skills to achieve their goals. Taking an active role in encouraging participants to work in pairs or small groups has many benefits. It can reduce social isolation. It adds a positive dimension (i.e., spending time with someone who is on a similar path) to tasks that might be unpleasant or challenging to complete.   It also provides a built-in positive peer-focused accountability system.
- *Provide opportunities to practice.*   Practice with support can increase participants' confidence about being able to complete a task. One example is to have participants conduct an independent job search one day a week (ideally on a day other than Monday or Friday) during the structured portion of a job search program. For example, in a 4-week job search program, you might dedicate every Thursday to independent job search. You could then use Wednesday to help participants decide the details of where, when and with whom they will conduct their job search and then use Friday to review how they did. Repeating this every week will help participants to anticipate the kind of problems they might encounter when they shift to looking for jobs on their own and to come up with solutions to address them.

SUPPORT STRATEGIES AS PARTICIPANTS "DO" THEIR PLAN (2)

Managing Stress

- *Introduce participants to stress management techniques.* Participants who are living with inadequate resources are under extreme stress which hijacks their attentional resources to focus on their goals. One way to help participants increase their chances of being able to focus on their goals is to help them come up with strategies to reduce stress in their lives. Mindfulness, which takes little time, is one effective strategy that can be implemented in job search programs at little to no cost. Apps like *Calm* can be downloaded for free and offer short mindfulness practices.
- *Help participants reduce their scarcity by ensuring they are receiving all the benefits and supports available to them.* When participants are struggling to meet their basic needs, they are under an incredible amount of stress. Helping them to access the resources can alleviate some of their stress, leaving more cognitive resources to focus on longer-term goals.

Managing Time and Staying Organized

- *Help participants develop their oen reminder systems.* Reminders can help to keep unpleasant or tedious tasks on a participant's radar screen. You can help participants with smartphones to set up a reminder system using their electronic devices. For those without smartphones, you can help them develop a pen and paper system, using a combination of a weekly or monthly calendar and daily to-do lists.
- *Model and/or teach effective time management.* One way to help participants become better at time management is to explicitly model it in everything you do – and to explicitly teach it if you have the time to do so. Modeling means assigning times to tasks that you may do during the day and assessing along the way whether you allocated too much or too little time to the task.

Avoiding Distractions and Competing Demands

- *Help participants identify what supports them in a positive way and what derails them.* One way to help participants achieve better self-control is to help them avoid situations that make it difficult for them to exert self-control, including socializing with people who push their buttons or don't support their efforts to achieve their goals. Another is to encourage them to schedule the tasks they most want to get done at the point in the day where they are least likely to be distracted, for example, immediately after dropping kids off at school.
- *Encourage participants to create a daily plan the night before.* Often the best strategy for avoiding distractions is to plan ahead. Encouraging participants to create a plan every evening for the next day can help them to stay focused.

Chapter 5: Participant Tools to Facilitate GPDR/R

Introduction

In the previous chapter, we provided tools that staff can use to help guide the integration of GPDR/R into the work they do on a day-to-day basis. In this chapter, we provide a set of tools that staff can use directly with participants to help them successfully set and achieve their goals. The supportive, intentional process that is at the heart of GPDR/R is more important than any of the tools! We hope you will adapt the tools as you discover what works best.   Figure 5-1 on the next page provides a visual roadmap that can help you decide which participant tools to use.   Below, and following Figure 5-1, we provide information on the purpose of each tool and guidance on how to us it.

GOAL

PLAN

DO

REVIEW /REVISE
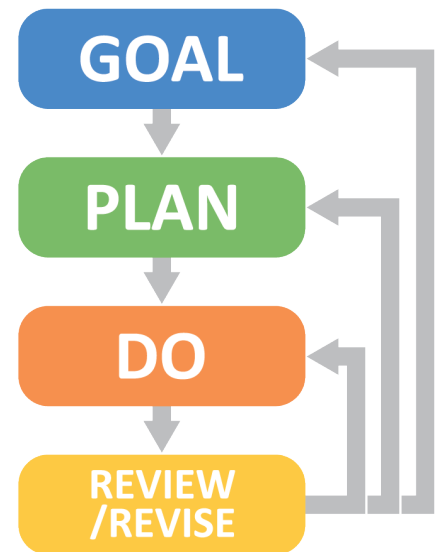
Participant Tools

The Path to Achieve Your Goals I Page 40
Area(s) of Focus: All Areas
Summary: This is a one-page summary explaining the GPDR/R goal achievement framework that you can give to participants to familiarize them with the process.

Life Areas I Page 41
Area(s) of Focus: Goal
Summary: This tool is intended to facilitate the process of helping participants get to a meaningful goal.   Sometimes participants have a hard time thinking of a goal they would like to achieve. This tool identifies different aspects of participants' lives to help spur their thinking. In addition to using it when participants can't think of a goal, you can also use it if you want to encourage participants to think broadly about their goals. You can use the tool with or without the prompts at the bottom. (We added the prompts to provide additional assistance to participants who get stuck finding a goal even when the life areas are identified.) This tool can be used with the Goal Storming.

Figure 5-1: Participant Tools to Support Goal Achievement

GOAL STORMING + LIFE AREAS

- These tools can be used together or separately for **generating a goal**
- They **expand** people's thinking about possible goals that are **meaningful** and **challenging**, but **within reach**

MY GOAL SUCCESS PLAN

We recommend this tool in any of the following situations:

- Teach the **whole process** of goal achievement
- Map out a **clear, short term** goal
- Support a client in **crisis**
- Set **daily goals**

OR

BACKWARD MAP

This tool can be used to guide participants through a **process** of identifying:

- the **steps** to achieve a goal
- the **resources** needed to complete each step

MY ACTION PLAN

Either version of this tool can be used to help someone visualize a **sequence** of steps, **write them down**, identify the **details** for completing the steps, and **anticipate** how they'll **prevent or respond to challenges** that arise on route to the goal.

Visual Version

Traditional Version

OR

Goal Storming I Page 42
Area(s) of Focus: Goal

Summary: Participants can use this tool to brainstorm anything they hope or desire to achieve in a given time frame. The program can decide the timeframe (shorter is better) and how to set the focus (whether wishes can be broad or whether they are related to employment, education, etc.). After brainstorming, you can guide participants to select the goal that is most meaningful and challenging but within their reach. This tool is intended to facilitate the process of helping participants get to a meaningful goal. Sticky notes or small pieces of paper can work just as well as (or better) than this form to get participants thinking about their future goals. The advantage of sticky notes or small pieces of paper is that participants won't feel compelled to fill every box. They also can be prioritized more easily if participants have more than one goal.

My Goal Success Plan I Page 43-44
Area(s) of Focus: All Areas

Summary: This tool brings together all aspects of GPDR/R and is meant to be printed two-sided. (If you can't printed two-sided, you can use it as a two-page form.) On the front, the participant fills in their goal and plan for achieving it. On the back, the participant writes in what will help them do their plan. This then forms the basis for a follow-up meeting to review what happened and revise the plan or goal using that information. This form can be used for any goal but works best with participants who are working on short-term goals that have only one or a few steps or are resolving a crisis. It also is a good tool to use if you are teaching the goal achievement process or doing repeated goal achievement practice, such as in a group job search program that meets regularly. You want participants to take the tool with them, but you also might want to keep a copy in case they forget to bring it with them to their next appointment. You can easily use the "The Language of Goal Achievement" with this tool.

Backward Mapping I Page 45
Area(s) of Focus: Plan

Summary: This tool helps participants develop plans by starting with what the finished goal will look like, then working backwards through the steps they need to take to achieve their goal and identifying the resources/materials they need to complete the steps in their plan. You can think of this as a "working tool" – it is designed to help participants think through what they need to do get from where they are to where they want to go.

- ✓ Identify and Visualize the Goal
  - Visualize a goal that is challenging but feasible. Start the process with a small goal that has a short time horizon- this is easier than a long-term goal.
  - Identify a target date for completion.

✓ <u>Identify the Steps to Get There</u>
- Break the goal into small steps.
- Many small steps can seem overwhelming, but it is important to start by naming all the steps to achieve the goal. Listing all the steps helps to make the path to success clearer.
- It is easier to just identify the steps first without worrying about the order, then order them. (Sticky notes work great for this part of planning.)

✓ <u>Gather the Resources to Get Ready</u>
- Identifying the resources ahead of time ensures that the participant is prepared to successfully complete the steps to achieve the goal.
- If a participant needs documents they do not have to complete the steps, the first goal might shift to getting those documents.

Once you have the steps and resources identified, you can use the information generated through the backward mapping process to help participants identify which steps they want to take first – these steps then form the basis for developing the action plan described below. You will come back to this map until the participant has completed all the steps to achieve their goal.

Staff can also use backward mapping and this tool to map out common processes such as the process for getting child care or transportation assistance.   If processes are already mapped out for participants, it reduces the demands on them. If the steps are clearly laid out, you can use the map with participants to decide what step they want to take first and spend more of your time working with them on developing a detailed action plan.

My Action Plan (Traditional) Page 46
Area(s) of Focus: Plan & Do
Summary: This tool provides a form that participants can use to write down their goal and why it's important to them and then list the detailed steps they will take within the specified period of time (including when and where to complete each step, what resources they need to complete the step). It also includes a section where participants can identify potential obstacles and solutions to them. (At the suggestion of staff who have piloted these materials, we use potholes and detours to refer to obstacles and solutions.) This form (or a variant of it) may be able to replace current individual responsibility or family development plans. A participant will take this form with them and you will want to keep a copy of it in your records to review and update at each encounter with a participant.

To make a plan actionable, guide the participant tthrough the following steps:

- *Identify the time period for the action plan and select the steps to be completed in that time period.* Time frames should be realistic for the action plan and the person: longer for some, shorter for those who may be overwhelmed or have not succeeded with previous plans.

- *Be clear about the focus of the action plan and the steps.* Always have the participant note why they want to do something and what they are working towards. This can help keep participants motivated through the harder or less enjoyable steps.
- *Add details.* How long it will take, when they will do it, where they will do it, and how they will get there.
- *Pay special attention to time management.* Effective time management means not just when you'll do something but how long it will take. Tools like time trackers can be helpful for those who have planning weaknesses.
- *Identify potential obbstacles and solutions to overcome them.* Once participants have identified what they will do, it is important to help them idenitfy things that might get in the way of their success and to identify ways to address them. Planning ahead increases the chances of success.

My Action Plan (Visual) I Page 47
Area(s) of Focus: Plan & Do

Summary: This tool is a visual version of My Action Plan. It is designed to be used with the Potholes and Detours tool. The Visual Action Plan offers participants a visual representation of the steps they will take to achieve their goal. It contains the exact same information as the top portion of My Action Plan and is used in the same way. A participant can be encouraged to place in a prominent place to help visualize their goal.

Potholes & Detours I Page 48
Area(s) of Focus: Plan & Do

Summary: This tool helps participants think through potential "potholes" -- obstacles that may cause them to get off track-- and the "detours" – actions they can take-- to stay on path to their goal. This form can replace the bottom portion of My Action Plan if you think the visual representation and the language of potholes and detours will resonate better with participants.

Worksheet: Do the Plan I Page 49
Area(s) of Focus: Do

Summary: This worksheet helps participants to think about the different kinds of supports they might need to do their plan. You can use it to guide a conversation with participants to make sure they feel as prepared as possible to implement their plan before leaving your office.

Worksheet: Review & Revise I Page 50
Area(s) of Focus: Review & Revise

Summary: This worksheet guides participants through the process of reviewing what they accomplished, identifying what they learned from their experience and deciding what to do next.

The Path to Achieve Your Goals:
Goal, Plan, Do, Review, Revise (GPDR/R)

Introduction

Setting and achieving goals is not easy. But, if you follow the process outlined here, you will increase your chances of success. This process can be used with daily life goals like exercising regularly or long-term goals like completing a training program.

Step #1: Set a Goal – something you want to accomplish

- When setting a goal, you should aim to set a goal that is:
  - ✓ something you truly care about
  - ✓ challenging but within your reach
- Your chances of being successful will increase if you: (1) take the time to imagine what it would feel like if you accomplished your goal and (2) write it down!

Step #2: Develop a Plan for how to get from here to there

- Characteristics of a good plan:
  - ✓ *Specific*, with the steps you need to take and the resources you need to complete them
  - ✓ *Identifies obstacles and solutions* for addressing them
  - ✓ *Written down*

Step #3: Do the Plan – put it into action

- To successfully complete a plan, you need to:
  - ✓ Follow the plan
  - ✓ Manage your time and stay organized
  - ✓ Manage your stress
  - ✓ Ask for help when you need it
  - ✓ Stick with it until it is done

Step #4: Review and assess your progress

- What did I accomplish? Did I follow my plan?
- What got in the way? How did I respond?
- What steps remain?
- What does my review tell me I need to do next?

Step #5: Revise – take the next action steps, make a new plan, or set a new goal

- Plans (and goals) are made to be revised – we rarely get them right on the first try
- Taking the steps to revise a plan means that you are learning about what matters most to you and what you need to do to be successful at achieving your goals
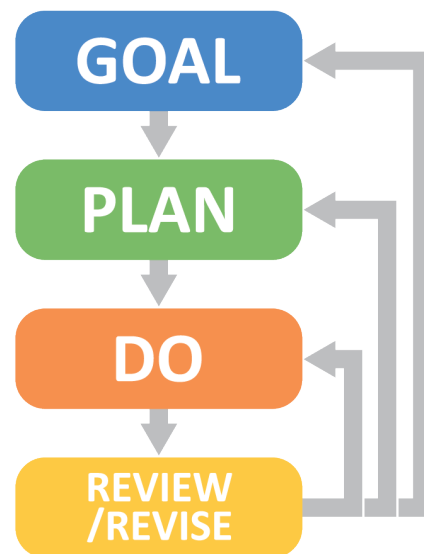
LIFE AREAS

Instructions: This graphic identifies areas of our life where we commonly set goals. Some of these areas might be more meaningful to you than others, or you might have important goals in several areas. it's all up to you!

(This is about what matters to **YOU** -- here's some things to think about if you get stuck.)

Would I like to focus on?
- *Health and Wellness:* Exercise more, eat healthier, drink more water, address a mental health, health or substance use issue
- *Legal issues:* Resolve some legal issues (pay fines, get a record expunged)
- *Safety:* Move to a safer neighborhood or leave a dangerous living situation
- *Stress:* Learn how to manage stress better
- *Financial:* Get out of debt; save money for a special outing; save to buy a car or house
- *Child Well-being, Care & Parenting:* Improve my parenting skills, spend more time with my kids, find better childcare
- *Education & Employment:* Finish high school, get a GED, get training for a specific skill, go to college, find a stable job, find a higher-paying job with more hours, start a business
- *Family, Friends & Relationships:* Spend more time with friends and family, find new friends with a positive outlook
- *Food, clothing & Shelter:* Find cheaper housing, find housing in a better neighborhood, find ways to make my SNAP benefits last longer, buy some new clothes for me and my kids

GOAL STORMING

Instructions: Write down as many things you want to achieve in the future as you can think of in five minutes. You can also use sticky notes or small pieces of paper. We will use this to guide what we work on next, and how to plan for that goal. There are no right or wrong goals- write down anything that comes to mind. They should be meaningful to you and doable.
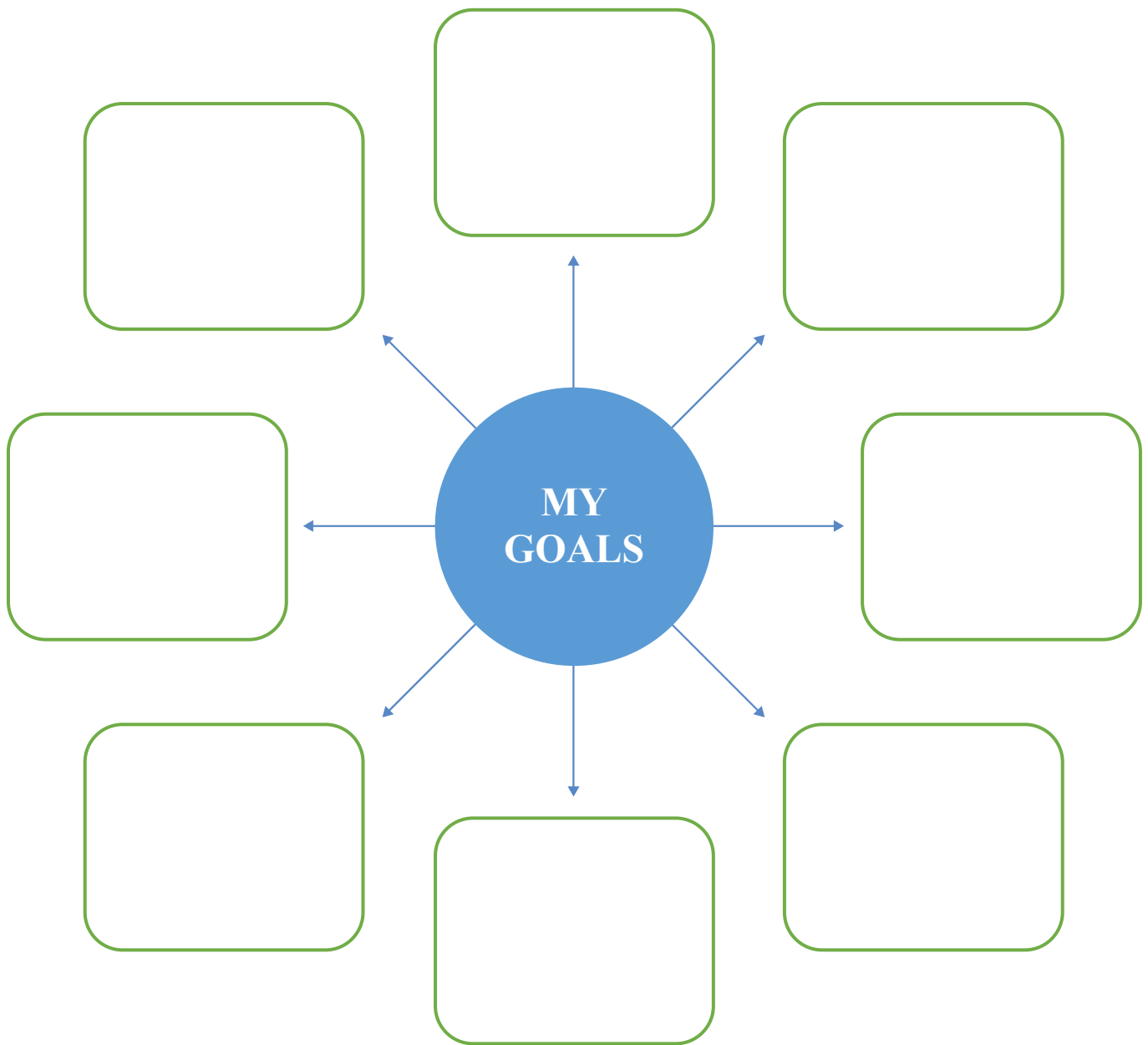
MY GOALS

MY GOAL SUCCESS PLAN

Name _____   **Today's Date _____**   **Review Date _____**

GOAL

What would I most like to achieve?

Why does this matter to me?

PLAN

What steps will I take? How will I do each step? When? Where?

What resources do I need to complete the steps?

What might get in my way? What can I do to respond so I can stay on track?

DO

What support do I need to stay on track?

Reminders to myself:

Who will I check in with to report on my progress or to ask for help if I get stuck?

How will I reward/encourage myself?

REVIEW & REVISE

What went well?

Where did I run into problems?

What did I learn about myself? What are my strengths?

What do I want to remember as I move forward?

What would I like to do next?

BACKWARD MAPPING
Developing a Plan to Achieve My Goal

← End Here | **Plan Backward** | Start Here

Resources I Need

List the materials, websites, phone numbers, or documents that you'll need for each step.

Steps to Get There

What are the steps I need to take to achieve my goal?
How long will each step take?

My Goal!

(Draw or insert picture here)

Target date for completion:
_____

Start Here | **Execute (Do) Forward** | End Here →
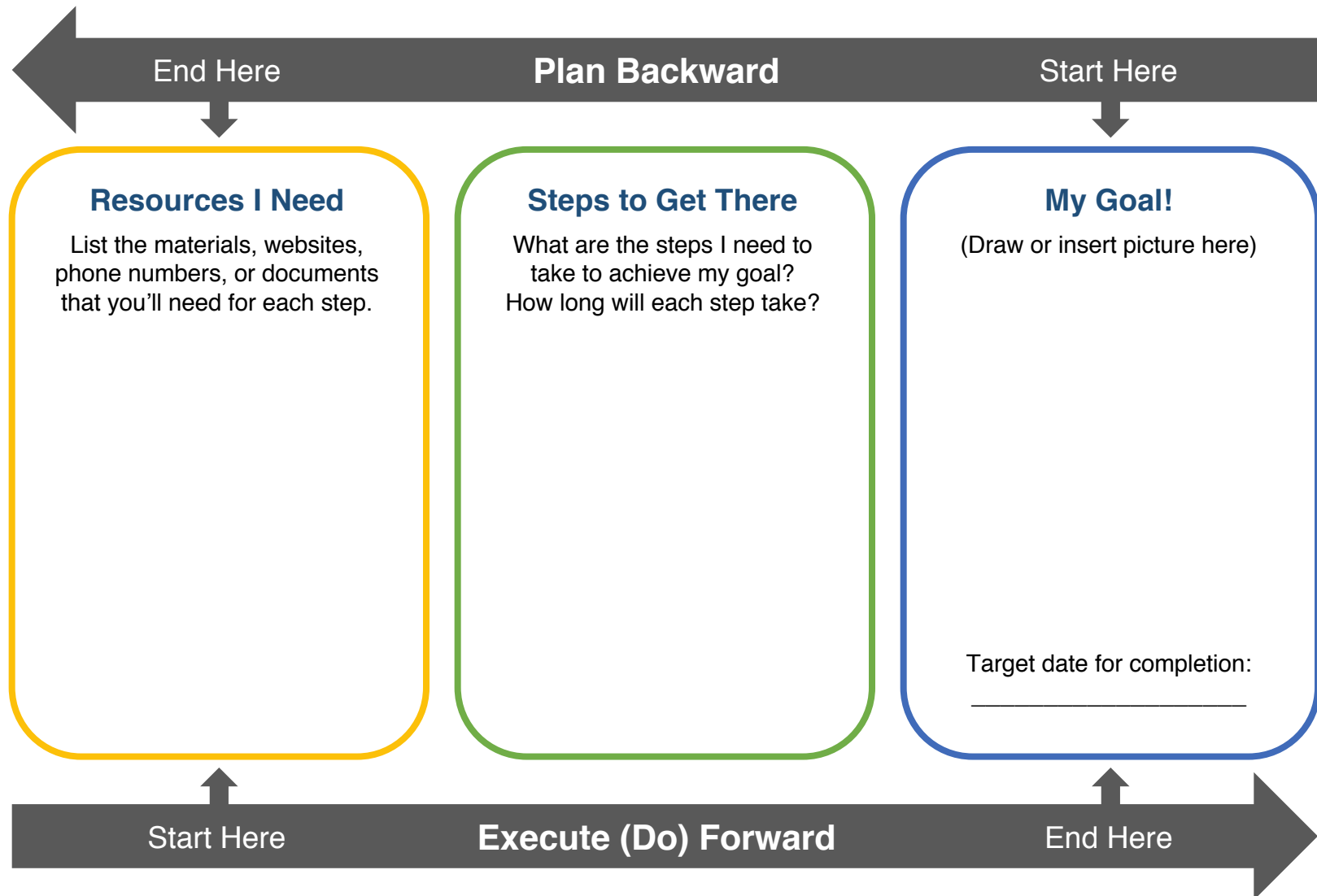
MY ACTION PLAN

Name _____   Today's Date _____   Review Date _____

MY GOAL	

WHY IT IS IMPORTANT TO ME	

STEPS I'M TAKING TO REACH MY GOAL

What will I do?	When will I do it?	Things I need to take with me	Where I'll go + how I'll get there

POTHOLES & DETOURS

What might get in the way?	How will I respond?

MY ACTION PLAN (VISUAL)

Today's Date _____

MY GOAL

▶ STEP 1

DETAILS

When I will do it:

What I need to take with me:

Where I'll go and how I'll get there:

▶ STEP 2

DETAILS

When I will do it:

What I need to take with me:

Where I'll go and how I'll get there:

▶ STEP 3

DETAILS

When I will do it:

What I need to take with me:

Where I'll go and how I'll get there:

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POTHOLES & DETOURS

WHAT MIGHT GET IN THE WAY?

HOW WILL I RESPOND?

POTHOLE

DETOUR

POTHOLE

DETOUR

POTHOLE

DETOUR

48

Worksheet | DO THE PLAN

Everyone needs some kind of support to put a plan into action. Supports can be routine (such as using calendars or alarms) or they can be "just in time" (such as calling a friend when you are feeling stuck.)

Example of routine supports:
- Use a small pocket calendar and write each of your action steps for a specific step date / time.
- Get a large calendar and use sticky notes to put each step in a date/ time. If something gets in the way of completing one of your action steps, you can then move things around.
- If you use a smartphone, enter each specific action step in a date/time and use alerts to remind you of each one.
- Load an app onto your phone that has reminders and encouragements.

What's a routine support you want to use?

Example of "just in time" supports:
- Tell your family what you are working on and that you'd like them to encourage you along the way
- Think about a friend you could ask to accompany you on one part of your plan
- Think about a someone you know who has experience in what you're trying to do and ask them for some tips

Who could best support you to do this plan?

Even in doing what seems like a simple plan on paper, we can lose energy or focus. That's very common! Giving ourselves personal support along the way is key. Personal supports are anything that you find encourages you to keep going. For example:
- Tell yourself you'll get a break after complete a difficult step
- Give yourself a small treat when you get through a hard part of the process
- Write words of encouragement where you can see them

What will encourage you?

Worksheet | REVIEW + REVISE

Review

To review your goal and your plan, take a few minutes to ask yourself the following questions:

- What did I achieve since our last meeting?

- What went well? What strengths did I draw upon?

- What did not go as planned? What got in the way? For example….
    - Did I have trouble getting started on some of the tasks?
    - Did I need things to accomplish the tasks that I didn't have or couldn't find?
    - Did things take longer than I anticipated?
    - Did the goal not feel that important to me after all?

- What have you learned about your strengths and how to use them to achieve your goals?

- What have you learned about reaching out for help and what kind of help would be most helpful?

Revise

Building on what you've learned about what went well and what did not, think about the following:

- How are you feeling about your goal? Does it still feel right to you?

- If you want to set a new goal, you return to the Life Areas and Goal Storming tools if you need some time to come up with a new goal. If you already have a new goal, use the Goal Success Plan tool to identify your goal and develop a plan for achieving it.

- If you want to keep with the same goal, use the Backward Mapping or Action Plan tool to develop a plan for completing the next steps. Make sure you feel confident that you have all the resources and support you need to achieve your goal. You deserve it!

Introduction

In the previous two chapters, we provided tools that staff can use to implement GPDR/R. In this chapter, we demonstrate how those tools can be applied in a group setting. The group setting offers several advantages when teaching GPDR/R. For example, people can be inspired by hearing others' goals – and can get valuable ideas from their peers while working through the process. If there is sufficient safety in the group, people may be more likely to follow through on intentions because they were shared aloud. Most importantly perhaps, hearing others at the review and revise stage can remind us that goal achievement is not easy and that getting where we want to go requires support, opportunity, creativity and perseverance. Unlike one-on-one interactions which happen sporadically, many group activities are repeated on a regular schedule, sometimes daily. Because executive skills are built through practice, group activities provide an ideal opportunity for teaching and practicing the executive skills that GPDR/R is designed to build and support.
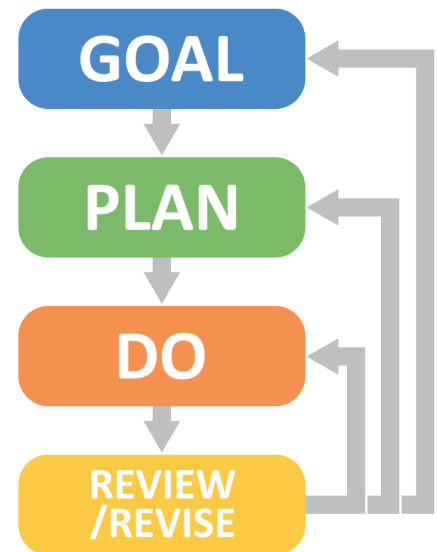
In this approach, your primary role as facilitator is three-fold:

- ✓ **Model:** use the GPDR/R framework yourself and show participants how you are using it
- ✓ **Practice:** support participants to use the framework, with feedback
- ✓ **Build:** repeat opportunities to use of GPDR/R again and again

We think that one of the best ways to teach GPDR/R is to model it as you teach other content that's central to your program. In this chapter we provide instructions for four workshops that do just that. **The workshops are meant to be resources – not recipes.**   We encourage you to be flexible with the suggested "scripts," and refer back to previous chapters of this guide for ideas of words and phrases that are true to the overall approach. Please, always bring your own facilitation style to the workshop. Experiment as you go and discover what works best! Our hope is that you will take the workshops we've constructed for you and use them as a guide to design your own.

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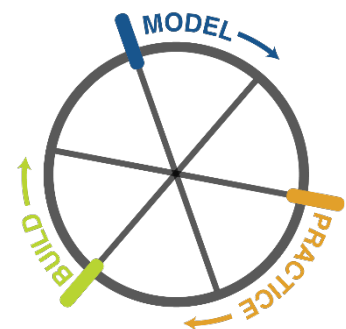
The 8 Steps OF Design™
A Workshop Design Framework

What makes for a good workshop? It all starts in the way the workshop is built. Like a pyramid, a strong workshop is built from a strong foundation. When building a workshop, we answer a series of questions, beginning with: *Who is this workshop for? Why is this workshop needed?*

Below is a snapshot of The 8 Steps of Design™ framework that has proven to be a very useful tool for building effective workshops. The next page offers a brief explanation of each part of the framework, so that you can use it to create any workshop.

The Learning Tasks — HOW?

The Content — WHAT?

The Achievement-Based Objectives — WHAT FOR?

The Time & Timing — WHEN?

The Anticipated Change — SO THAT?

The Place & Space — WHERE?

The People — WHO?

The Current Situation — WHY?

The 8 Steps OF Design™		
Who?	**The People**	A deep understanding of who will participate and who will lead it
Why?	**The Current Situation**	A description of the situation that is calling for the workshop
So That?	**The Anticipated Change**	A realistic vision of what will be different as a result of the joint learning experience
When?	**The Time and Timing**	A detailed description of the time available for the workshop, noting how this influences the possible amount and depth of content to cover
Where?	**The Place and Space**	A decision on the best location to support the learning, and a description of the limitation that the place might offer
What?	**The Content**	A carefully-constructed set of skills, information, and perspectives to focus on in the learning
What For?	**The Achievement-Based Objectives**	A specific description of what learners will do during the program with each piece of priority content, in order to learn it
What For?	**The Learning Tasks**	A flexible, yet structured, process through which all learners build their skills and share their learning

The 8 Steps OF Design™ was developed by and is a registered trademark of Global Learning Partners. You can find additional information on their work, including more on facilitating group workshops at this link.

Global Learning Partners

Goal Achievement Introductory Workshop

Purpose and People
This workshop walks participants through the entire goal achievement sequence: Goal, Plan, Do, Review, Revise (GPDR/R) so that they can use it again and again to support their goals, both big and small.

The workshop is designed for participants in any phase of a group activity like job readiness or job search, and for groups as small as 3 or as large as 15. For groups beyond 15 we suggest 2 facilitators to ensure personal support as clients identify their goals and develop their plans. Facilitators will be most effective if they themselves have experimented with the GPDR/R framework to achieve their own personal goals.

Timing and Frequency
The workshop has two parts. Each part is designed for about 2 hours – but more time would be good if you want to "dig deeper." The two parts of the workshop can be separated by anywhere between one day or one week. If you have more than one week between workshops, we suggest personal outreach to each participant in the interim to check in.

You may use this workshop at the start of a program to introduce participants to the goal achievement process. You may repeat it later on by having participants focus on different kinds of goals – for example, the first time focus on a goal about any aspect of their life and then focus on an explicit job search goal. *The intent is that after introducing the process, you will use the entire process or pieces of it throughout your program. Repetition is key to building skills.*

Materials and Advance Preparation
We suggest creating a packet for each participant that includes one copy of each tool and worksheet they will use, in the sequence in which you will use them during the workshop.

TOOLS
Six of the tools from Chapter 5 will be used in this workshop:
1. The Path to Achieve Your Goals (page 40)
2. Goal Storming (page 42)
3. Life Areas (page 41)
4. My Goal Success Plan (page 43-44)
5. Worksheet: Do the Plan (page 49)
6. Worksheet: Review & Revise (page 50)

POSTERS AND CHARTS

Day One:
- One sheet of large blank paper per team and one marker per person.

Days One and Two:
- One set of five (5) small posters, one for each step: Goal, Plan, Do, Review, Revise.
- One chart with the words Goal, Plan, Do. (You will write your personal example on this chart as the workshop unfolds).

Note: *You may adapt these participant materials to reflect your own approach to goal achievement. For example, if you model and practice SMART goals with clients, you may incorporate SMART guidelines into step one of GPDR/R.*

Achieving Our Goals | WORKSHOP OVERVIEW

WORKSHOP DAY ONE	WORKSHOP DAY TWO
Objectives	
On day one, clients will: - Explore a path for achieving your next goals - Set one heartfelt and achievable goal - Develop a plan for achieving your goal and map out specific action steps to "do" the plan	On day two (at least 1 day later after participants have had the opportunity to "do" their plan), clients will: - Review their experience - Revise their goal and/or their plan - Reflect on this goal-achievement process and make it their own
Agenda	
30 min. | Achieving Life's Goals 15 min. | Goal Storming 15 min. | One Personal Goal 30 min. | A Plan for Getting There 15 min. | Getting Ready to "Do" the Plan 15 min. | Closing	30 min. | Celebrate 20 min. | Review 20 min. | Revise 30 min. | Take it Away 20 min. | Closing | Ongoing Support

Notes:
(1) *Workshop Days One and Two should be separated in time by anywhere from one day to one week.*
(2) *The times on this agenda are rough estimates based on doing the workshop with a small group of participants. Day one might be a little tight, and day two a little loose; so please adjust time as you see fit. Also keep in mind that you will need more time for a larger group, especially one that shares a lot!*

Achieving Our Goals | WORKSHOP DAY ONE

Note: Text in *italics* offer suggested language that you can adapt throughout the workshop; text in regular type provides any necessary explanations.

30 min. | Achieving Life's Goals

Introduction:
- **Open with a powerful affirmation that EVERYONE in this room has been setting and achieving goals their whole life.** In fact, chances are that the individuals here today have faced and overcome many challenges, while creatively and effectively pursuing what they want for themselves and their families. In this two-part workshop we'll explore a process for goal achievement that may enhance what you've been doing your whole life. To anchor us, we'll work together toward a shared goal and see what happens!

A Shared Experience:
- Divide the group into teams of 3-4. If you have a small group, they can work together – but otherwise create teams (a mini competition makes it fun!).

- *As a team, you're going to pursue a goal together and achieve it in 10 min. Here's the task: Imagine that your cousin is going through a rough time and decided to move here to your home city/town. She is raising two kids alone and will be looking for work (living with you until she has a place of her own). She asked you to create a "map" of the city/ town for her, showing the places she should know to get her oriented when she first arrives. Work as a team to create that picture (a simple map using images and/or words). Your goal is to have something ready to photograph and send to her in 10 min. You can use each other and anything else you have here in the room as a resource while you pursue the goal. What are your questions?*

- Give each team paper and markers (different colors if possible). Once they begin, be careful not to interfere or guide, except to answer questions to clarify the goal or to confirm the resources they might use. For example, if they ask to use a cell phone to look up some information, that's fine! If they reach out to a friend who has some useful

> ### Facilitator Tip
>
> This opening activity is a very important "anchor." The intent is for participants to have a shared experience of the whole goal achievement process: clarify a goal, make a plan, get support to put the plan in action, and then review how they did. It gives participants the big picture before getting into any details. You will refer back to this experience throughout the rest of the workshop. You will also get good insights into what to emphasize and how to support individual participants through the remainder of the workshop.

information, that's fine too. But, wait until they ask about resources to let them know what they can use.

- After 10 min. ask them to stop. Review the team (or each team's work) and congratulate them, wherever they got. Review the experience with the following open questions:
  - *How did you feel about this goal when you began?*
  - *How much time or effort did your team spend on planning what you would do?*
  - *While doing the "map", what resources did you use?*
  - *What strengths and support did each team member bring?*
  - *What did you like about this experience? What might you do differently next time?*
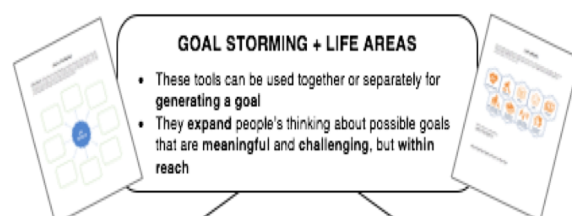
A Path to Achieve Your Goals

- Reflect: *We set and pursue goals everyday. Sometimes we name the goal clearly, sometimes we take the time to create a plan, sometimes we use other people and other resources to help us achieve the goal, and someties we take the time to learn from our experience. But, often, we don't approach goals that way. Rather, we just start our day doing the next thing that is calling our attention. That can be overwhelming and can leave us feeling like we're spinning our wheels. So, we've found it helpful to step back and explore a proven approach to setting and achieving goals.*

- Together, read through The Path to Achieve Your Goals.
  - *Which step described here feels most important based on your experience and why?*
  - *What are you curious about?*

- As you read through the worksheet with the participants, you may write each step on small posters spaced out along the walls of your room. You'll use these visuals as you walk through the steps. Explain: *Next, you'll go through each of these steps around a goal you care about. You don't have to share the goal or any of the other steps in full group if you don't want to – but you also can get input along the way if you want.*

15 min. | Goal Storming

- Explain: *This goal achievement process requires that we start with one, crystal-clear, personal goal. It can be difficult to focus on one goal because we are attentive to many areas of our life at one time. To focus on a goal that matters deeply to you right now, we'll begin with a tool we simply call "Life Areas."*

Facilitator Tip
To start, participants may use a combination of two tools, as depicted in the tool tree. You may want to demonstrate it once using your own example first.

GOAL STORMING + LIFE AREAS
- These tools can be used together or separately for generating a goal
- They **expand** people's thinking about possible goals that are meaningful and **challenging**, but within **reach**

- Invite participants to reflect on different areas of their lives right now to to note what is calling their attention in each. You may walk through the life areas by name, briefly, as they reflect. Give a few minutes for each participant to privately circle and write responses on the sheet.

- Next, move to the tool called "Goal Storming." Invite participants to focus on ONE life area and brainstorm the goals they have in that area.

15 min. | One Personal Goal

- Explain that, from their brainstorm of goals, they will now choose one that they want to focus on in this workshop.

- Offer an example of short-term goal within a life area that is important for you, the facilitator. Make sure it is truly meaningful to you and "do-able" between now and the next part of this workshop (anywhere between 1 day and 1 week from now). You may write it at the top of a chart, to which you'll add each step of GPDR/R as the workshop continues.

- Emphasize two essential elements of a goal:

    1. Meaningful: *Name one specific goal that is truly important to you. There is no right-or-wrong goal if you care about it now.*
    2. Doable: *Choose a goal that is challenging, but that you feel you could accomplish by the time we get together again (i.e. tomorrow, or in a week).*

Facilitator Tip

Starting here, participants will use My Goal Success Plan (GPDR/R) tool to capture their thinking.

MY GOAL SUCCESS PLAN

We recommend this tool in any of the following situations:
- Teach the **whole process** of goal achievement
- Map out a **clear, short term goal**
- Support a client in **crisis**
- Set **daily goals**

- You may walk around and encourage participants to choose a goal that they find meaningful AND challenging, but within reach. Ask them how they'd feel about sharing the goal aloud with others in this room.

    Before moving on, ask each participant to fill in the Goal section of My Goal Success Plan tool.

- As you see fit, invite them to say their goal aloud to one other person (or to the group, if all are comfortable with that.)

30 min. | A Plan for Getting There

- Look at the plan step of the My Goal Success Plan. Explain that developing a plan involves

  1. **Action:** writing down specific steps to move us toward our goal
  2. **Resources:** identifying the resources and support that will help us succeed
  3. **Preparation:** anticipating things that might get in our way.

- Offer your own example of a plan by naming a few specific steps you will take toward your goal. Then, name any resources you need to complete the steps. Then, name one thing that might get in your way and how you plan to avoid it or overcome it. [You may write your plan on the large chart under your goal.]

- Walk around the room and be a thinking partner as participants think through a focused, concrete plan. Having scraps of paper or sticky notes might be helpful to some.

- Hear a few volunteers share their plans aloud in full group. Affirm 1) the action steps; 2) the resources named; 3) the preparation noted. Emphasize how your program is designed to provide resources and support to participant as they work through their plans.

15 min. | Getting Ready to "Do" the Plan

Mindset:

Explain that plans exist on paper – and rarely are implemented exactly as written! So, in order to be successful, we first want to get the right mindset.

- Invite people to call out words that describe the mindset they want to have going into this plan. Share examples of the mindset you want to have to do your plan successfully such as: *flexible, confident, realistic, gentle with myself…*

Supports and Encouragement:

- In order to successfully implement a plan, we want to rely on some support. There are many different kinds of support we may draw on. For example:

  1. Routine support (such as setting reminders on your phone or using a calendar to track appointments)

  2. "Just in time" support (such as calling your sister the moment you feel discouraged)

  3. Personal support (such as giving yourself a break when you feel stuck).

- [Optional] Refer to ideas and questions on the worksheet "Do the Plan."
  Work with participants as they jot down supports they want to use. Invite volunteers to share examples of supports they will use to do their plan successfully.

  Encourage participants to jot down notes on My Goal Success Plan tool under the "do" step over the next day/s.

- Remind everyone: *Achieving our goals is a process that takes time and can be hard work. Get the support you want – in whatever form. And, keep experimenting with what makes it easier for you to put a plan into action!*

15 min. | Closing

- *Encourage participants to keep their Goal Success Plan tool handy. It can be a valuable reminder of what you decided here today.*

  Goal: What you aim to accomplish before the next day of this workshop,

  Plan: Steps and ways around obstacles

  Do: Supports you'll use to do the plan

- Ask them to bring the tool back to the next workshop. *When we come back for the next session, we'll celebrate whatever happened – and make adjustments to you goal or your plan as you wish. Enjoy your journey!*

- Check in on how people feel walking out the door. Explain how they can reach out to you before you see them again.

Achieving Our Goals | WORKSHOP DAY TWO

Note: Text in *italics* offer suggested language that you can adapt throughout the workshop; text in regular type provides any necessary explanations.

30 min. | Celebrate

Welcome everyone to day two of "Achieving Our Goals" – a workshop in which we support each other to priortize and achieve goals we care about. We'll celebrate whatever happened and exchange insights based on what we know about goals from our own life experience.

- Point out the GPDR/R posters around the wall.Ask people to get up out of their seats and stand next to the poster that represents what they are most proud of. For example:

  - *If you are still commited to the goal you set, or if you refined that goal to be even more meaningful to you, then stand by the poster that says "Goal."*
  - *If you worked some of the steps of your plan – or worked around an obstacle that came up in your plan, then stand by the poster that says "Plan."*
  - *If you reached out for some support or gave yourself encouragement as you put your plan into action, then stand by the poster "Do."*

- Encourage everyone to think BIG about this goal achievement process. It really isn't about having achieved the one goal you set out for yourself but, rather, about getting into a rhythm of naming goals, making plans, pursuing those plans and learning from what happened.

20 min. | Review

- Introduce this step: *When we pursue our goals, most of us move onto the next thing without taking time to pause and reflect on what happened. Learning from where we've been - and setting ourselves on a new path – is a really important part of the process. So, that is what we'll do now.*

  - Reflect aloud on the goal you named in the first workshop:

  - Remind them of your goal, and plan

  - Tell them about how you put the plan into action – and what you discovered along the way by responding to these questions:

    What went well?
    What did not go as planned?
    What did I learn?

- Invite the participants to interview each other (in pairs) using the same "review" questions above. Encourage them to jot down their thoughts unde "Review" on the tool: My Goal Success Plan.

- Remind them that these questions are carefully constructed to help us learn from our experiences and build on them. Without such a "review" we can find ourselves in a rut of doing the same-old, same-old and not feeling like we are making progress. In other words: In pursuit of our goals, no experience is a failure; it is only a learning experience!

  [Note: if the group seems reluctant to interview in pairs, you could invite one participant to be interviewed by you in front of the others. Everyone will learn from the process.]

- [Optional] You may use the worksheet "Review and Revise," focusing first on the questions under "Review." Explain that the last of the "review" questions leads us directly into "revise".

20 min. | Revise

- The "Revise" step of a goal achievement process is often neglected but can be the most critical – and most satisfying.
- Have each participant work independently to revise their goal, plan, or action steps.
- Encourage them to jot down their thoughts on a new My Goal Success Plan tool. Walk around to offer individual guidance and encouragement as much as you can.
- In full group, ask for volunteers to share what they will revise moving forward:
  - A new goal?
  - A different plan? A different kind of support?
  - A next step?

30 min. | Take it Away

A Path to Achieve Your Goals
- Scan back over the opening tool: A Path to Achieve Your Goals.
- To synthsize the process, invite participants to stand up under the posters that represent their response to each of the questions below. After each question, take a few minutes to reflect on where people are standing and invite them to comment about why they stood there.
  - *Which step feels most important to you now, why?*
  - *Which step do you feel is a strength/ comes easily to you? Why?*
  - *What is one thing you've discovered about achieving life's goals?*

A Reminder

- Distribute a blank index card to each participant. Invite people to jot down the steps of the goal achievement process. (Alternatively, you can develop your own reminder card that has the GPDR/R steps on it as well as your and the program contact informaton.)

GOAL	Selecting a goal that is meaningful and within your reach Visualizing what it will feel like to achieve your goal
PLAN	Developing a detailed, written plan Identifying potential obstacles and solutions to address them
DO	Taking steps to do the plan and reaching out for supports you need to put your plan in action
REVIEW / REVISE	Reviewing your successes and revising your plan.

Our hope is that the card will remind you of all the steps of this process. You can carry it around with you – and refer to it often as you work toward a goal.

20 min. | Closing – Ongoing Support

Congratulate all clients for engaging and sharing.

Underscore how important it is for all of us to reach in – and reach out - when pursuing our goals. In fact, goal achievement is less a personal process than it is a community one. We need each other – for encouragement, for resources, for connections, for support.

You may invite participants to look back over the tool titled "Life Areas" and reflect on all the active goals they have in their lives now. Ask: *What is one way that this program – or anyone in it – might better support you and your goals?*

Exchange ideas for mutual support available to us all on our paths toward achieving life's goals.

Action Planning Workshop

Purpose and People

This workshop walks participants through the entire action – planning process. It can be done as a follow-up to the Goal Achievement workshop that introduces GPDR/R. Or, it can be done instead of that workshop, with participants who would benefit from a detailed planning process.

The workshop is designed for participants in any phase of a job readiness or job search program; and for groups as small as 3 or as large as 15. For groups beyond 15 we suggest 2 facilitators to ensure personal support as clients develop their detailed plans. Facilitators will be most effective if they themselves have experimented with the backward map and action planning processes to pursue their own personal goals.

Timing and Overview

The workshop is designed for about 2.5 hours. Estimated time for each section is in the agenda, below, but this is totally flexible based on your size group – and your personal style.

Action – Planning Workshop
Objectives
In this workshop, you will: • Exchange insights about how to plan for things we care about in life   • Practice a new approach to planning common, everyday tasks   • Created a detailed plan for something you care deeply about   • Named how we can support each other to fulfill our plans and our heartfelt goals
Flexible Agenda
15 min. | Opening: How We Plan   45 min. | Planning Common Tasks   45 min. | Backward Mapping   30 min. | Action Planning   15 min. | Closing: Living the Plan

Materials and Advance Preparation

We suggest creating a packet for each participant that includes one copy of each tool and worksheet they will use, in the sequence in which you will use them during the workshop.

TOOLS

The tools used in this workshop can be found in Chapter 5 of this guide.

1. Backward Mapping I Page 45
2. My Action Plan (Traditional) I Page 46 or
3. My Action Plan (Visual) and Potholes and Detours I Pages 47 and 48

15 min. | Opening: How We Plan

Explain: *In this workshop, we're going to exchange wisdoms about how to build an effective plan and we'll share a couple of tools you can use over and over again to make that planning personal.*

To start, think back over the last week of your life. You accomplished lots of things that required planning. Some of us enjoy planning and others don't – but we all do it.

What is one thing you realize you planned and accomplished this past week?

Hear examples in the full group. As you listen, note how many steps there may have been in some of the plans.

45 min. | Backward Mapping Common Tasks

People who pay a lot of attention to planning claim that there are three key characteristics of effective planning:

✓ Start with the future and work backwards. Rather than plan from step one, forward – we've discovered it's more effective to begin with the goal we want to accomplish and work backwards to create a plan.
✓ Break the plan into small steps. We often think we break tasks into small steps, but we rarely do. Small means really small!
✓ Pay attention to details. We are much more likely to complete our plans if we create a detailed plan pay attention to the details

- *What do you think of these characteristics? What else do you think is key to planning for something you really want?*
- *We've got two tools that work together to support effective planning. We call the first of these a "Backward Map." Let's take a moment to check out the parts of the backward map.*
- *The other is called an "Action Plan." Take a moment to check out the parts of the action plan.*
- *We're going to use both of these to plan a set of common, everyday tasks.*

Divide the room into 6 small groups. Each group gets a printed picture of one of the common tasks provided at the end of the workshop instructions. (You can also come up with your own tasks if you'd like.) Ask each group to use Backward Mapping to:

- decide on what steps need to be taken to get to this goal; and,
- decide what resources/support are needed for each step.

After each group has done their backward map, distribute My Action Plan and ask them to order the steps into this new worksheet. Tell each group to generate one action plan for their common task and post it on the wall.

Invite observations in full group:

- *How was it to create a plan for these tasks? How did it feel? What would have been helpful?*

Repeat the Backward Mapping and Action Planning for one program-related task such as getting child care or getting a social security card or getting an interview for a job. You may do one as a full group or divide into small groups again, each with a task.

Afterward, invite observations:

- *How was it to create a plan for these tasks?*
- *What might this mean for us as a program that supports people to achieve these kinds of tasks?*

45 min. | Backward Mapping Personal Goals

Review the characteristics of an effective plan:

- ✓ Start with the future.
- ✓ Break the plan into small steps.
- ✓ Pay attention to details.
- ✓ Other characteristics named by the group.

Explain that everyone will now use the two tools together to build an effective plan for a goal they really care about. Emphasize that the tools are not important. They can use a blank piece of paper or sticky notes if they prefer. The important thing is that they experiment

<table>
<tr><td>Facilitation Tip
(Backward Mapping)</td></tr>
<tr><td>You may want to prepare a personal example of a backward map. Create the tool on a large chart and work backwards from a goal that is near and dear to your heart. Tell the group what you found surprising, difficult, and useful about using the backward map.

BACKWARD MAP
This tool can be used to guide participants through a **process** of identifying:
• the **steps** to achieve a goal
• the **resources** needed to complete each step</td></tr>
</table>
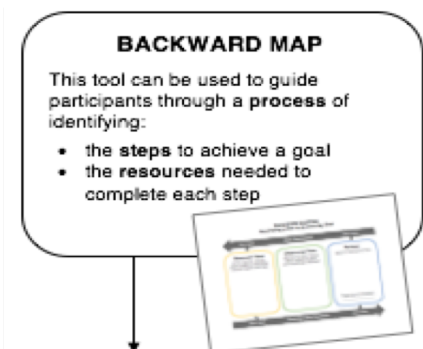
with a process that honors the characteristics we all named above. (Here is where you can walk through your personal example.)

Distribute individual copies of the "Backward Map." Walk through it from right to left.

1. **Goal:** Everyone draws or writes a specific goal for the next week. Invite a few examples out loud.
2. **Steps:** Everyone brainstorms steps that would lead to this goal. Remember the steps don't need to be carefully sequenced. Invite one or two examples out loud.
3. **Resources:** Everyone lists resources that would be needed for the steps. Invite one or two examples.

Ask the group: *What did you find surprising, difficult, and useful about using the backward map?*

30 min. l Action Planning

Now, move onto the "Action Plan." To begin show your own action plan on the wall.

Then invite one volunteer to do an action plan with you in front of the others so you can "coach" them through the process, and benefit from their own insights about how to move from the map to a very specific, sequenced, list of actions.

Finally, invite everyone to complete their own action map.

You may walk around and coach participants as they decide for themselves on a action plan that feels right.

The section titled "potholes & detours" helps us each think through obstacles that might get in our way (potholes) as well as ways to avoid or overcome those obstacles (detours).

- Guide participants through a visualization to make this step realistic and useful: *Envision yourself taking steps toward your goal. Ask yourself:*

  What might get in my way?

  What might I do to prevent each obstacle or overcome it?

- Walk around the room and guide participants to anticipate internal and/or external obstacles.

Facilitation Tip
You may also want to prepare a large example of an action plan, based on your own backward map. Tell the group what you found surprising, difficult, and useful about using the detailed action plan. [Remember – you may use the visual action plan tool instead of this traditional one if you prefer.]

Traditional Version

- You may encourage participants to come up with an "If, Then" statement to identify an obstacle and their response to it. "If [obstacle] happens, then I will [action]."

- Emphasize that this isn't meant to focus on the negative but, rather to prepare us for what might come up.

- Invite one or two participants with strong plans to share their examples in full group. As participants share, affirm specific things about the plans as a way to teach and reinforce this challenging part of the process.

- Celebrate the planning. *Take a moment to imagine that you've completed this goal and write down a reward you might gift yourself as encouragement. Rewards, too, are an important part of the planning process!*

15 min. | Closing: Living the Plan

We've exchanged wisdoms about how to build an effective plan and we've done some hard work developing detailed plans to achieve something we each care deeply about. We would do well to reach out for support as we "live into" these plans. Before we close, find one person – either in this room or reachable by text – who will actively support this plan you've crafted. Ask them now for the support you want. If you can't think of anyone or anything specific, ask me – I'm here to support you.

Common Tasks for Planning Common Tasks

DO A LOAD OF LAUNDRY

WASH THE CAR

PICK CHILD UP FROM SCHOOL

GO GROCERY SHOPPING

PICK UP A PRESCRIPTION

MAKE DINNER

Making GPDR/R A Habit

Purpose

This activity is designed to help participants get in the habit of using GPDR/R on a regular basis. It focuses on encouraging clients to set very short goals so that it simplifies and demistifies the goal-setting process. It is an ideal exercise to do with participants who have a lot going on in their lives and are unlikely to succeed at setting and achieving long-term goals. Success at achieving small, short-term goals is a way to build the skills, habits and confidence that then allows people to identify and tackle bigger and longer-term goals.

Timing and Frequency

This activity can be done at any time and with any frequency that works given the structure of your program. To help make goal-setting a habit, you could do this exercise at the end of every session. You can use it to get participants thinking about working on goals they want to achieve at home between now and the next session or goals that they'd like to focus on for the next job search group session. You can change the focus so that participants are encouraged not only to think about goals in the context of job search but in all aspects of their life. For example, at the end of a session, you could ask participants to work on identifying a goal related to their children that they can accomplish over the weekend.

Materials

You do not need any materials for this activity. However, if you'd like, you can have participants use the form, My Goal Success Plan.

Advance Preparation

This activity is short and does not need any advance preparation. You can use it as often as you'd like, including daily. The focus here is on very short-term goals so this is designed as a stand-alone activity.

Tools

You can do this activity without any tools or you can use the Goal Success Plan tool (pages 43 and 44).

The Activity

Invite the clients to sit back and relax for a moment – cutting out all the "noise" in their minds, bodies, or setting[5]. In this quieted space, ask them to think about the next day (from right now

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[5] You may find it helpful to do a quick mindfulness activity for 2-3 minutes. You can find adaptable ideas at
http://blog.atriushealth.org/2013/04/smart-kids-practice-mindful-eating/

to 24 hours from now). (Note: You should keep the timeframe short, but you can expand it beyond 24 hours.)

1. **NAME IT.** What is one thing you would like to accomplish in this next day? There may be many things but let one of those surface to the top – whatever it is. What is that one thing that, above all else, you'd like to accomplish within the next day?
2. **CHECK IT.** How strongly do you feel about this goal: Is it something that really matters to you? Is it challenging but something you believe you can accomplish in the next day? Based on answers to these questions, adjust your goal to be something you care deeply about and feel is doable in the next day.
3. **VISUALIZE IT.** What would this goal look like DONE? Picture everything about it. How does it feel to see the goal done?
4. **WRITE IT/DRAW IT.** Write down your goal. Draw it if you'd like. Take the picture in your mind and put it on paper. It doesn't need to be a good drawing- don't let that get in the way. This is for you. Draw your goal done. Put in as much detail as you have in your mind – everything that matters to you – no more, no less.
5. **FEEL IT.** Step back and check what it feels like to see your goal. Is this something that really matters to you?
6. **PLAN IT.** Now, think about what steps you need to take to achieve the goal and any resources you need to have on hand to complete the steps and write them down. Finally, think about one thing that could get in the way and come up with something you can do to overcome it.
7. **SHARE IT.** When you've got a picture of a goal that you care deeply about, and feel that you can achieve in the next day, take a moment to share it with one other person (or with the full group). Name what the goal is – and why this goal matters to you. Hold onto your words or picture – you may carry it with you or post it somewhere as the day progresses.
8. **DO IT.** Get ready to do it! Think about when and where you'll do the plan. Write it down.
9. **REVIEW IT.** Pick a time when and a person with whom you can share your accomplishment. When you talk with them, share how it went and talk about what you learned about yourself.
10. **REVISE IT.** If you don't accomplish what you hoped to accomplish it, take what you learned to heart and try again.

> **Facilitation Tip**
>
> <u>Make It about Job Search</u>
>
> You can adapt this activity to focus explicitly on a job search goal. Instead of asking participants to name something they want to accomplish, ask them to name one goal related to finding a job that they would like to accomplish.

Resume Workshop

Purpose

This workshop uses GPDRR as a structure for a resume-writing workshop. It aims first and foremost to support participants as they create or refine a resume.

Throughout the process you will model GPDRR verbally and in writing – by telling and showing your own goals and plans for the workshop. In this way, participants both hear and see the full goal achievement process in action.

Finally, the workshop aims to reinforce the routine of setting concrete, short term goals, and following through with that goal until achieved.

Timing and Frequency

This workshop also has two parts, of est. two hours each. The parts can be separated in time by anywhere between one day or two weeks.

Materials and Advance Preparation

CHARTS
- A chart showing the overview of the workshop: parts one and two. (See below.)
- Titled charts that you'll complete during the workshop:
    - Goals for Our Resumes

HANDOUTS
- A handout with Tips for Resume-Writing. (We do not provide this as we imagine you already have one!)
- Two examples of strong resumes. (Again, we do not provide this as we imagine you have many. We suggest that the examples are ones the participants can relate to, and which – despite potential challenges – do a good job of telling someone's personal story.)

TOOLS
- My Goal Success Plan: This tool is a place for participants to write down their GPD on Workshop Day One, and their R/R on Workshop Day

OTHER
- Lots of blank paper for drafts, and a bank of computers for a small group of participants to use in workshop part two to enter their resume electronically. (Note: We realize that staff may do this for all or some participants in your program, so adapt accordingly.)

Resume Workshop| DAY ONE

WORKSHOP DAY ONE	WORKSHOP DAY TWO
Objectives	
In part one, you will: • Draft or Update a Personal Resume	In part two you will: • Refine your resume and (optional) create an electronic version to share with future employers
Agenda	
10 min. | Getting Started 20 min. | Your Vision of a Good Resume 20 min. | Resume Tips and Examples 60 min. | Create a New Resume (with support) 10 min. | Closing Reflections and Preparation	10 min. | Opening Check-in 45 min. | Finalizing and Getting Feedback 45 min. | Creating Electronic Versions (switch small groups) 20 min. | Closing Exchange

Telling Your Story to Future Employers | Workshop Part One

Note: Text in *italics* offer suggested language that you can adapt throughout the workshop; text in regular type provides any necessary explanations.

20 min. | Workshop Goal and Plan

GOAL

• *Welcome to the first session of a two-part workshop titled "Telling Your Story to Future Employers." Some people call this our "resume" workshop but we lke this title because we think about your resume as your personal story, told in a way that is of interest to people who might hire you. Our* ***goal*** *is that, by the end of this two-part workshop, each of you will have a complete electronic, up-to-date resume that tells your personal story.*

Modeling Tip
At the start of the workshop, explain that each person's goal for this workshop might be slightly different. For example, if someone has never had a resume, they may want to figure out what to include in their resume. Or, if someone is looking for a particular kind of job, they may want to tailor a resume to appeal to that kind of employer.

- *You might think that is a lot to accomplish in the time we have, but I'm confident that, together, we can achieve this goal.*

What is one personal goal you have for this workshop? (Hear for everyone and note these on a chart : "Goals for our Resumes.")

PLAN

*Here is our **plan** for how we will work together for each of you to complete a resume.*

Show the **chart: Workshop Overview** and talk participants through it, with enough detail that they understand the flow.

As we go, I'll check in with all of you to see if we need to make any adjustments to the plan I just outlined. Plans help us to have a roadmap of where we are going but there are often twists and turns in the road so we need to be flexible and change our path if the one we're on isn't working!

What questions or requests do you have about our plan before we begin?

DO

10 min. | Your Vision of a Good Resume

- Explain: *One useful way to think about a resume is that it tells your story. You'll want to tell that story in a way that is accurate, and that highlights your potential for a future employer. Remember, you don't only include paid work experience on a resume but anything that you've done in your life that you believe makes you some am employer would want to hire.*
- Ask:
  - *Who would like to share their thoughts on what makes for a good resume?*
  - *What questions do you have about your own resume that you would like to get clear about today?*

20 min. | Resume Tips and Examples

- *As the first step in our plan, we'll review a handout: Tips for Resume-Writing, then we'll look at one or two examples of a strong resume.*
- Distribute the handout and ask what people find most helpful here. Field questions.
- Show one example resume and ask: *What do you find especially strong about this resume? If you were looking for someone to hire, why might you interview this person?*

60 min. | Create a New Resume

Explain; *At this point in our plan, each of you will outline your new or updated resume. The resources we'll need are all available. These include:*

- *Tips for resume writing- and an example to use as a guide;*
- *Blank paper and pencils*
- *Me! (I'll walk around to provide input and guidance. Call me over anytime you want.)* Note: *We're not going to use computers yet today. We'll do that in part two of the workshop.*

What other resources would be helpful for you to accomplish the goal of drafting a new resume?

10 min. | Closing Reflections and Preparation

To wrap up today, let's review by hearing from everyone.

- *What parts of your draft resume are you most proud of? What concerns you?*
- *Remind yourself of your personal goal for this resume. How are you feeling? What additional support do you want?*

Now, let's take a quick look at our plan for part two of this workshop. [Review overview of part two.] *How does this look to you?*

Modeling Tip
The Closing Reflection of this workshop is a good point to review/revise. But, you can also do this with individuals at any point throughout the workshop. For example: *I'd like to review how things are going for you and make changes as we see fit.* - *What have you discovered so far about creating a resume?* - *How are you feeling about your resume?* - *What's one way you'd like to strengthen it?*

Before leaving, let's each set a goal to achieve before we get together again. For example, I'm going to give written feedback to each of you on your draft resumes. I'll do that tomorrow morning during my desk time, and turn off my phone so I'm sure to get it done!

Distribute the tool: My Goal Success Plan. *Using the worksheet, write down one goal you have for now until we meet again. For example, you may want to find out one piece of information for your resume, or contact one person to be a reference.*

As you complete the first part of your GPDR worksheet, share it with one other person. I'll walk around and hear them all. Have a great evening!

Modeling Tip

As you use GPDRR yourself, and model it for participants, you'll likely discover that "revise" will lead you back to the top – to a new "goal"! That's very useful, and a great thing to point out to participants.

For example, imagine that you have piloted the resume workshop #1 a few times and reviewed the results. You notice that the less confident participants underplay themselves in their resumes. You want to do something about this.

So, when presenting the goal to the next cohort, you explain:

> *In facilitating this workshop over time, I've noticed that some of us are reluctant to highlight our own strengths. My new goal for this workshop is for all of us to leave with a strong resume that captures all our strengths! In turn, I've revised my plan a bit. We'll form pairs and help each other 'draw out' our strengths to include in the resume. How does this sound?*

Telling Your Story to Future Employers
Workshop Part Two

Note: Text in *italics* offer suggested language that you can adapt throughout the workshop; text in regular type provides any necessary explanations.

10 min. | Opening Check-In

GOAL

Welcome to the second session of our two-part workshop titled "Telling Your Story to Future Employers." Our goal is that, by the end of today, each of you will have a complete resume that tells your personal story in a way that you feel represents you – and your potential – to future employers.

Distribute everyone's draft resumes with your (encouraging) feedback. Walk around and check in with each person.

Invite everyone to review the Goal Success Plan tool that they completed during part one of this workshop. As a group, talk them through the review and revise questions. Invite a few volunteers to share:

- *What's something you really want to accomplish in this second part of the resume workshop?*
- *How can we all support you in that?*

PLAN

Here is our plan for today. Show the chart: workshop part two overview and talk participants through it, with enough detail that they understand the flow.

We will use the following resources to complete this part of the workshop:

(1) *Our tips and example/s from day one;*
(2) *Your draft resumes – with feedback from me;*
(3) *The computers.*

As always, I'll check in with all of you to see if we need to make any adjustments to the plan I just outlined.

As you go through the workshop, you may want to consult the group on revising your plan. For example

> *A number of you seem to be having trouble figuring out how to include volunteer work on your resume. Would it be helpful if we talk about that as a group before we continue? If we do that, we'd need to revise our current plan by trimming the time for our next task by 5 or 10 minutes. What are your thoughts?*

You may also demonsrate how you work around roadblocks to pursue the goal. For example, assume the computers are down the day you planned to have everyone type their resume in the computer:

- *The computers are down so we need to revise our plan for the day. Our goal is to have everyone leave here with a completed resume. Any thoughts on what we should do?*
- *Should we:*
  - *Reschedule the workshop?*
  - *Finish the resumes on paper, take a snapshot and have staff type them up?*
  - *Have everyone go to the library in their neighborhood to use computers there?*

DO

45 min. | Finalizing and Getting Feedback

Split the group into two. Explain:

- *Group 1 will go to the computer to start to enter their resume;*
- *Group 2 will continue to work on completing their resume*

Later, we will switch groups and Group 1 will get feedback from me on the electronic version of their resume and Group 2 will enter their resume into the computer.

45 min. | Creating Electronic Versions

Switch groups and continue as above. Perodically remind the group of the plan and the time remaining. Ask who feels like they need a support and give lots of encouragement along the way.

If someone is stuck, coach them through the process of taking a break, getting ideas from others, etc.

20 min. | Closing Exchange and Appreciation

- Watch the time so everyone is at an okay stopping point near the end of the workshop.

- Sit in a circle if possible and congratulate everyone on where they've come in this process.

- *Imagine that you have a resume in hand that tells your story for future employers. Imagine that you are ready to send it out – or hand deliver it. Imagine what that feels like.*

- Give a clean copy of the tool GPDR/R tool so that participants can use it to set a new goal related to their resume. Their goal can be anything they come up with -- perhaps to complete final touches on the resume - or to ask a friend to review it – or to distribute it to potential employers. Whatever goal they have can do in the top part of the tool – and use the rest, as you have practiced together – to guide them along the path of achieving that new goal!

Using the Executive Skills Profile

Guidance for Administering the Executive Skills Profile

WHAT ARE EXECUTIVE SKILLS?

Executive skills are a set of brain-based skills that:

1. Make it possible for us to choose our goals and then guide our behavior in a way that makes it likely that we will reach our goals.
2. Help us to avoid the behaviors that will derail our progress.

These skills help us complete tasks and attain our goals. We focus on 12 skills, but we can think of them in three clusters:

- o Skills we use to plan and prioritize,
- o Skills we use to control our actions and emotions (self-control),
- o Skills we use to monitor our actions and progress.

Everyone uses these skills on a daily basis, and understanding them will enable you, as a coach, to better understand the strengths of and challenges facing each participant.

THE ES PROFILE

The executive skills profile is intended to help coaches and participants focus on what skills a participant already has, and what could be improved upon to promote self-sufficiency. Administering this profile can help you get a clearer picture of a participant's skills, help them to select a job or career path that is a good fit with their profile and help to set priorities for how to best provide support and promote skill development. If used effectively, the ES profile has the potential to enhance individual goal attainment, and overall program outcomes.

GETTING STARTED

Before you begin administering the profile with participants:

- Make sure that you fully understand and are comfortable talking about what executive skills are and why they matter, as well as the statements in the profile. Participants are likely to have questions about individual skills and what strengths and challenges mean for them.
- Three resources for getting comfortable with this material are the following webinars, available at buildingbetterprograms.org under 'executive function, EF Webinars'
  - o *Executive Function Skills: What They Are and Why They Matter*- Presented by Silvia Bunge, Ph.D.
  - o *Using an Executive Function-Informed Goal Achievement Framework to Redesign Employment and Related Human Service Programs*- Presented by LaDonna Pavetti, Ph.D.

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- o   *Administering & Using the Adult Executive Skills Profile-* presented by Richard Guare, Ph.D.
- Be sure to complete the executive skills profile for yourself. This will make it easier to relate to the participant's experience, and you will be able to give your own real-life examples of how these skills impact day-to-day functioning. It may also help to make the participant more comfortable completing the profile, producing better results.

THE ES PROFILE IS DESIGNED TO:

- Offer clarity about a participant's existing strengths and opportunities for improvement.
- Help prioritize the time and resources of a coach.
- Allow coaches and participants to identify appropriate employment and/or education opportunities based on their current skill profile and desired skill development.
- Provide assistance to coaches in service planning.

THE ES PROFILE IS *NOT* DESIGNED TO:

- Be a clinical or diagnostic tool.
- Be a research tool – it does not measure change in executive skills over time.

SCRIPT & TIPS FOR USING THE PROFILE

Below is a sample script of how to introduce this to a participant:

Today I want us to talk about something called executive skills. You may not have heard about these before, but we all use them every day and they are critical in helping us become successful. These skills are used to help us plan and prioritize, control our actions and emotions, and monitor how we are doing. We use these for both small and large tasks, from doing laundry to finding a job. The statements we will go over together assess 12 different skills. We all have some of these that are strengths for us and some that need improvement. By honestly assessing these, you can hopefully get to know yourself better and we can better develop a plan for your continued success. Knowing what you are good at can help inform job searches and education opportunities, and knowing what you can work on can help us create a focused plan to move forward. As we go through this, feel free to ask questions!

As you go through the profile, keep the following things in mind:
- Make sure the participant is comfortable with rating the statements. Remind them that we all have strengths and areas we can improve. *Remember, no profile is "better" or "worse" than any other*.
- Explain to participants how to score each section and then transfer the score to the summary sheet.
- It is helpful to discuss your own skills profile to make a participant feel more at ease and also to give examples that highlight different skills.

- It may be useful to point out your own observations if they are unsure of how to rate an item. You may help them remember situations when they needed to use these skills and discuss the outcome.
- Make sure to balance your discussion of challenges and strengths. This leads to a more effective plan and a willing participant.

WHAT NEXT?

The executive skills assessment is designed to be mutually beneficial for the coach and participant. It can help to focus and narrow down a job search, or show areas where a participant may want more support as they pursue training or education.

When all items have been rated and each section has been totaled, look at the highest and lowest scores. *The highest scores are the strengths, and the lowest scores are opportunities for growth and improvement.* This should inform your planning and discussions with the participant about their goals and the best ways to meet them.

After you complete the executive skills profile, you may want to give participants a copy of Table 2-1 which includes a listing of the skills and definitions for each of them.

EMPLOYMENT GOALS & GOODNESS OF FIT

An important aspect of the ES profile is recognizing that not all employment goals will match with someone's profile. Therefore, it is important to think of goodness of fit between the goal and what you know to be the strengths and challenges. Here is a guide for using goodness of fit when working with participants:

- If a person has strengths in the executive skills most required to meet the goal in the target environment, there is a "good fit" with the goal.
- On the other hand, if the person has weaknesses in the executive skills required to attain the goal, there is a mismatch, and the weak executive skills may be an obstacle to goal attainment.
- For example: A participant hoping to work in customer service will likely need strong response inhibition and stress tolerance skills.
- In cases where you see a mismatch between skill strength and goals, try to offer insight about this to the participant and see if there are other jobs they are interested in that would be more suitable based on their strengths profile.
- You can offer examples of local jobs that might be a good fit based on your knowledge of their ES profile.

EXECUTIVE SKILLS PROFILE

Understanding Your Planning, Self-Control and Monitoring Skills[6]
(Revised April 23, 2018)

You may have never heard of **"Executive skills"** or **"executive function skills"** but they are skills that you use every day -- we're all good at some and not so good at others. They are skills we use to manage our life and achieve our goals. They help us accomplish big goals, like completing a training program, or saving for a down payment for a house. They also help us achieve smaller goals like getting to work on time or completing the paperwork to get childcare.

This profile will help you get to know yourself better by looking at how well you: plan and prioritize, control your actions, emotions and behavior to get things done, and monitor your progress to see if you are on track.

INSTRUCTIONS
1. Read each item and then think about how well it describes you. Use the rating scale to choose the best score. If the item doesn't describe you at all, circle 1, *strongly disagree*. If it describes you very well, circle 6, *strongly agree*. Often, you'll find that you're somewhere in between so circle one of the numbers from 2 to 5 that describes you best. Be as honest as possible—the more honest you are, the more you'll learn about yourself.

2. Total each section in the box on the right. Here's an example:

Organization *(Knowing where I put things)*	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I am an organized person.	1	2	3	(4)	5	6	**12**
I keep my space neat and have things where they belong.	1	2	(3)	4	5	6	
I organize my work before I start doing it.	1	2	3	4	(5)	6	

3. Now, look back over your whole profile. Your highest scores indicate what you do easily (<u>strengths</u>). Your lowest scores are the areas that are harder for you (<u>challenges</u>).

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[6] Adapted from Peg Dawson and Richard Guare, Copyright Guilford Press (2012,2016). This adaptation was done in conjunction with the Center on Budget and Policy Priorities for use with employment and human service programs.

EXECUTIVE SKILLS PROFILE

Planning / Prioritization *(Deciding what steps to take)*	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I have a clear plan for what I need to do each day.	1	2	3	4	5	6	
I focus on the most important things when I have a lot to do.	1	2	3	4	5	6	
I break big tasks down into smaller tasks and set deadlines to get them done.	1	2	3	4	5	6	

Time Management *(Knowing about how long a task will take and what the deadline is)*	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I finish what I plan to do by the end of the day.	1	2	3	4	5	6	
I am good at guessing how long it takes to do something.	1	2	3	4	5	6	
I am on time for appointments and activities.	1	2	3	4	5	6	

Organization *(Knowing where I put things)*	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I am an organized person.	1	2	3	4	5	6	
I keep my space neat and have things where they belong.	1	2	3	4	5	6	
I organize my work before I start doing it.	1	2	3	4	5	6	

EXECUTIVE SKILLS PROFILE

Task Initiation *(Getting started without a delay)*	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
No matter what the task, I believe in getting started as soon as possible.	1	2	3	4	5	6	
I do things I say I'll do, without putting them off.	1	2	3	4	5	6	
Even if interrupted, I finish jobs before the last minute.	1	2	3	4	5	6	

Response Inhibition *(Seeing the consequence <u>before</u> I say or do something)*	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I listen before I draw conclusions.	1	2	3	4	5	6	
I think before I speak.	1	2	3	4	5	6	
I get all the facts before I take action.	1	2	3	4	5	6	

Emotional Control *(Keeping my cool when frustrated)*	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I do what I am supposed to do, even if I get frustrated.	1	2	3	4	5	6	
I keep my cool, even if my feelings are hurt.	1	2	3	4	5	6	
I keep my temper in check.	1	2	3	4	5	6	

Sustained Attention *(Paying attention, even when I don't feel like it)*	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I stay focused on what I am doing.	1	2	3	4	5	6	
I keep working until the job is done.	1	2	3	4	5	6	
I find it easy to get back on track and complete what I started.	1	2	3	4	5	6	

EXECUTIVE SKILLS PROFILE

Stress Tolerance *(Managing your stress)*	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I enjoy working in a highly demanding, fast-paced environment.	1	2	3	4	5	6	
A certain amount of pressure helps me do my best.	1	2	3	4	5	6	
I find it easy to manage a changing work schedule.	1	2	3	4	5	6	

Goal-Directed Persistence *(Sticking with your goal)*	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I am driven to meet my goals.	1	2	3	4	5	6	
I give up short-term pleasures to work on long-term goals.	1	2	3	4	5	6	
I set goals and I work on meeting them the best I can.	1	2	3	4	5	6	

Working Memory *(Remembering what I did and what I need to do)*	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I have a good memory for facts, dates and details.	1	2	3	4	5	6	
I am very good at remembering the things I am supposed to do.	1	2	3	4	5	6	
I set reminders to get things done.	1	2	3	4	5	6	

EXECUTIVE SKILLS PROFILE

Metacognition (Evaluating how you're doing)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I can review a situation and see how I could improve.	1	2	3	4	5	6	
I know when I am doing a good job.	1	2	3	4	5	6	
I easily recognize when a job is a good match for my skills.	1	2	3	4	5	6	

Flexibility (Going with the flow, accepting change)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I respond well to unexpected events.	1	2	3	4	5	6	
I easily adjust when plans change.	1	2	3	4	5	6	
I am flexible and adjust well to new situations.	1	2	3	4	5	6	

EXECUTIVE SKILLS PROFILE

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EXECUTIVE SKILLS PROFILE

Executive Skills Profile Summary

Look back over each skill and mark your score for each section on the summary sheet below. Put your three highest and your three lowest scores in the boxes on the right. Your highest scores indicate what you do easily (strengths). Your lowest scores are the areas that are harder for you (opportunities for improvement).

My Executive Skills Profile	Total Score on Section
A. Planning/Prioritization (Planning Ahead)	
B. Time Management (Using Time Well)	
C. Organization (Keeping Things In Order)	
D. Task Initiation (Getting Started)	
E. Response Inhibition (Think, Then Act)	
F. Emotional Control (Staying Cool)	
G. Sustained Attention (Staying Attentive)	
H. Stress Tolerance (Dealing with Stress)	
I. Goal-Directed Persistence (Sticking with It)	
J. Working Memory (Remembering)	
K. Metacognition (Stepping Back)	
L. Flexibility (Going with the Flow)	

**My Executive Skill Strengths
(Three highest scores)**

_____

_____

_____

**My Executive Skill Opportunities for Improvement
(Three lowest scores)**

_____

_____

_____

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