

# Executive Skills Coaching Plus Incentives in a Workforce Program

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Introducing the MyGoals Demonstration

May 2020

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The MyGoals for Employment Success demonstration is primarily supported by Arnold Ventures, which is contributing to the implementation of the MyGoals program in the Baltimore and Houston housing agencies, and to the evaluation of the program. The expansion of the MyGoals study sample to a second cohort of participants and further evaluation of MyGoals is funded by the U.S. Department of Health and Human Services as part of a broader evaluation of employment coaching programs. The Kresge Foundation is also supporting the evaluation of the MyGoals program. The Harry and Jeanette Weinberg Foundation is supporting program operations in Baltimore, and Houston Endowment, Inc. is supporting program operations in Houston. The JPB Foundation is further supporting program operations in both sites. Earlier planning work was supported with funding from the John D. and Katherine T. MacArthur Foundation and the U.S. Department of Housing and Urban Development.

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*In Memory of Michael Wiseman*

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# Overview

Success in the world of work depends on more than having the capacity to perform technical tasks required for jobs that employers need to fill. Success is also influenced by the strength of one’s “executive function” or “executive skills” — the mental skills used to execute tasks — including emotional control, stress tolerance, time management, organization, mental flexibility, persistence, and others. A growing body of research in neuroscience and cognitive behavioral psychology finds that the stress and chaos of poverty can impair one’s executive skills and thereby may impede a person’s success in navigating the labor market, acquiring occupational credentials, performing well at a job, and advancing at work.

This report introduces the MyGoals for Employment Success demonstration. MyGoals is an employment coaching program that helps participants set and achieve goals. It seeks to do so by explicitly focusing attention on participants’ executive skills.

The focus on executive skills means, for example, that coaches help participants understand their own executive skills so that participants can decide whether certain types of jobs are a good “fit” for them. And if executive skills challenges are impeding participants’ success in achieving their goals, coaches help participants learn behavioral strategies to address those problems. MyGoals also offers participants a set of financial incentives to encourage, facilitate, and reward their engagement in the program and progress in achieving employment goals. Although employment is the program’s central focus, the coaches also help participants set and achieve goals in other relevant domains: education and training, financial management, and personal and family well-being. Coaches make referrals to other services in the community as appropriate given participants’ goals.

Two public housing agencies — one in Baltimore, Maryland, and one in Houston, Texas — are piloting the program and evaluating its effectiveness with a randomized controlled trial. This report describes the origins of the MyGoals model, its core features, the rationale behind those features, the contexts in which the program is being operated, and how the program is being evaluated.

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## Acknowledgments

The development of the MyGoals for Employment Success program model and the launch of the MyGoals demonstration in Baltimore and Houston were made possible by the generous support of Arnold Ventures. We are also grateful to the additional funders who supported the operations and the evaluation of the MyGoals program in Baltimore and Houston, which include the Harry and Jeanette Weinberg Foundation, Houston Endowment, Inc., the Kresge Foundation, and The JPB Foundation.

Richard Guare, a developer of the executive-skills-based coaching model used in MyGoals, was instrumental in adapting the coaching model to the MyGoals employment program in the context of the two housing agencies, and, along with Colin Guare, is working closely with MDRC staff, MyGoals coaches, and MyGoals coaching supervisors to ensure that the model is implemented with fidelity.

The MyGoals demonstration relies on the strong support and cooperation of the staff of the Housing Authority of Baltimore City and the Houston Housing Authority, who made it possible to bring MyGoals services into their communities. We wish to thank Tracey Oliver-Keyser, Harriet Johnson, Katreese Lee, and Adrienne Coleman at the Housing Authority of Baltimore City, and Robin Walls, Carla Ferguson, and former staff member David Joost at the Houston Housing Authority for their collaboration and support, especially during the formative stages of the demonstration. We also thank all the MyGoals coaches at both housing agencies who work tirelessly to help improve the lives of people in their communities through delivering MyGoals services and who generously shared their early experiences with the research team. We are also deeply grateful to the individuals in the program and control groups who are participating in the MyGoals demonstration, including participating in random assignment and data collection, and are allowing us to learn from their experiences.

We also thank our additional partners for their help in implementing the MyGoals program. The City University of New York's Labor Market Information Service provides tailored labor market information to MyGoals coaches at each site and works with them to communicate this information to program participants. We are, in addition, grateful to the Financial Clinic and the CASH Campaign of Maryland for training and supporting MyGoals coaches in financial education and coaching for MyGoals program participants.

At MDRC, our thanks go to our colleagues who made important contributions to the design of the demonstration, its implementation, or to this report. Gayle Hamilton, Samantha Wolfsohn, and Donna Wharton-Fields provided insightful feedback on report drafts. Donna

Wharton-Fields, Keith Olejniczak, Hannah Dalporto, Annie Utterback, and Gloriela Iguina-Colón provided extensive technical assistance to the sites to strengthen the implementation of the MyGoals program in the demonstration. Joshua Vermette processed and analyzed the quantitative data used in this report. Gloriela Iguina-Colón coordinated the production of the report. Will Swarts, with Alice Tufel, edited the report, and Ann Kottner prepared it for publication.

This report is dedicated with gratitude and affection to the memory of Michael Wiseman from George Washington University, who helped design the comprehensive program model and frame the demonstration. The MyGoals program model benefited greatly from his early contributions.

The Authors

## Introduction

Achieving economic independence depends not only on a person’s ability to perform the technical tasks that jobs require, but also on a person’s “executive function” or “executive skills,” the mental skills “required for humans to execute tasks.”<sup>1</sup> These skills include self-regulation processes like emotional control, stress tolerance, time management, organization, mental flexibility, persistence, and others.

Yet, a growing body of neuroscience and cognitive behavioral psychological research suggests that the stress and chaos of poverty can impair one’s executive skills, and, in doing so, may impede a person’s success in navigating the labor market, acquiring occupational credentials, performing well at a job, and advancing in work. This is a typically overlooked way in which living in the conditions of poverty can undermine the very capacities a person needs in order to escape those conditions. This observation has important implications for workforce programs that aim to help very low-income adults achieve economic mobility. It suggests that explicitly focusing attention on participants’ executive skills may improve program effectiveness. At the same time, no evidence currently exists to support such a conclusion.

An experimental workforce program called MyGoals for Employment Success, designed by MDRC in collaboration with neuropsychologist Richard Guare and the subject of an ongoing evaluation by MDRC and Mathematica, makes participants’ executive skills a core component of a carefully structured workforce coaching process. In contrast to more typical case management approaches, the MyGoals approach involves helping participants set economic mobility goals and work toward them in a systematic, step-by-step fashion, following a formal coaching curriculum.

Participants examine the strengths and challenges of their own executive skills and learn procedures for taking them into account when setting and working toward their goals. Understanding their own executive skills can help participants decide whether certain types of jobs are a good fit for them. And if specific executive skills challenges make it hard for participants to achieve their goals, coaches can help them develop behavioral strategies to address those problems. MyGoals also offers participants a set of financial incentives to encourage, facilitate, and reward their engagement in the program and progress in achieving employment goals. Two public housing agencies — one in Baltimore, Maryland, and one in Houston, Texas — are piloting the program, and the study team is evaluating its success with a randomized controlled trial.

This report introduces the MyGoals demonstration, describing the origins of the model, its core features, the rationale behind those features, the contexts in which the program is being

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<sup>1</sup>Dawson and Guare (2009). See further discussion of executive skills in National Scientific Council on the Developing Child (2010); Mullainathan and Shafir (2013); and Mani, Mullainathan, Shafir, and Zhao (2013).

operated, and how the program is being evaluated.<sup>2</sup> Later reports will present more details on the evaluation and its findings.

## The MyGoals Demonstration

MDRC developed the MyGoals demonstration with support from Arnold Ventures. It received additional support from other private funders (the JPB, Kresge, and Weinberg foundations and the Houston Endowment) to launch a small trial in two locations.<sup>3</sup> After the project began, MyGoals became part of a multisite evaluation funded by the U.S. Department of Health and Human Services (HHS) and led by Mathematica to test several employment coaching programs for recipients of Temporary Assistance for Needy Families (TANF) and other low-income populations.<sup>4</sup> Box 1 describes this evaluation. Once MyGoals was made part of that study, HHS provided resources to expand both the number of individuals enrolled in the MyGoals evaluation and the scope of the research.

### Box 1

#### **HHS Evaluation of Employment Coaching for TANF and Related Populations**

MyGoals for Employment Success is part of a multisite evaluation funded by the Office of Planning, Research, and Evaluation in the Administration for Children and Families, U.S. Department of Health and Human Services, and led by Mathematica, assisted by Abt Associates, to evaluate employment coaching programs for recipients of Temporary Assistance for Needy Families (TANF) and other low-income populations. In addition to the MyGoals program in Baltimore and Houston, the other programs in this evaluation include the Family Development and Self-Sufficiency program in Iowa; Goal4 It!<sup>TM</sup> in Jefferson County, Colorado; and LIFT in Los Angeles, New York City, and Chicago. The evaluation will (1) describe how each of these programs is implemented; (2) use a random assignment design to evaluate the effectiveness of each program in helping people with low incomes improve their economic mobility; and (3) examine effects of coaching on self-regulation skills and the role of self-regulation skills in improving participants' employment outcomes.

The Housing Authority of Baltimore City (HABC) and the Houston Housing Authority (HHA) are implementing the demonstration program. MDRC is managing the demonstration and, with several partners, is responsible for training and providing technical assistance to the program staff. These partners include Richard Guare, an executive skills coaching expert and a

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<sup>2</sup>See Riccio and Wiseman (2017) for more detail on the program's origin, rationale, and logic model. Sections of the current report draw heavily from that earlier document.

<sup>3</sup>The Weinberg Foundation supported program operations in Baltimore, and the Houston Endowment did the same for the Houston program.

<sup>4</sup>See Joyce and McConnell (2019) for background on how employment coaching may improve employment outcomes and Moore et al. (2019) for a description of the evaluation design.

developer of the coaching model used in MyGoals; the City University of New York’s Labor Market Information Service (LMIS), which provides workforce programs with tailored information on job openings in their service areas; and the CASH Campaign of Maryland, an organization that trains and supports providers of financial coaching for low-income families.

MDRC is evaluating MyGoals in partnership with Mathematica. The study is using a randomized controlled trial to measure the program’s effects on a variety of self-sufficiency outcomes, including employment, earnings, receipt of housing subsidies, material hardship, economic mobility, personal well-being, and others.

The MyGoals program serves unemployed recipients of federal housing assistance funded by the U.S. Department of Housing and Urban Development (HUD). Participants are either recipients of Housing Choice Vouchers, which are housing subsidies that help low-income families rent from private landlords, or they live in public housing in the participating cities. The program is voluntary. MyGoals and other staff at each housing authority recruited participants through special outreach efforts, including direct invitations to tenants who came to the housing authority to renew their housing assistance or conduct other business related to that assistance. Program staff shared information about MyGoals at special community and housing agency events, and through direct mail campaigns. The Baltimore and Houston sites together recruited about 1,800 individuals interested in MyGoals, randomly assigning half to receive MyGoals program services, and half to a control group. Members of the control group do not participate in the program, but their employment and self-sufficiency outcomes in the absence of the program will form the benchmark against which the success of MyGoals will be measured. Individuals who were randomly assigned to the MyGoals program are eligible to receive MyGoals services — including coaching and financial incentives — for three years. The program began operating in early 2017 in both locations and will continue through September 2022.

MyGoals study participants in both sites are predominantly female (80 percent in Baltimore, 88 percent in Houston), and African American (97 percent in Baltimore, 94 percent in Houston), and had average annual household incomes of just under \$11,000 in Baltimore and just under \$9,000 in Houston in the year before study enrollment. Houston participants had a somewhat higher level of average household earnings than Baltimore participants (about \$3,500 annually in Houston compared with about \$3,100 annually in Baltimore). Baltimore participants had substantially higher levels of public assistance household income than Houston: an average of about \$1,300 annually in TANF income compared with an average of under \$100 in Houston, and an average of about \$4,400 annually in Social Security and Supplemental Security Income compared with an average of about \$3,100 in Houston. About half of the study participants in Houston and a third of those in Baltimore are single parents. Although all were unemployed or minimally employed at study enrollment (a condition of eligibility for the study),<sup>5</sup> their work histories varied greatly, with some having worked recently and others with longer periods out of the labor market.

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<sup>5</sup>“Minimally employed” means working less than 20 hours a month.



Eligibility for MyGoals was limited to individuals of working age (18 years old), up through age 56 (a cutoff set to minimize the share of study participants likely to retire during a long follow-up period). Participants beginning the program had an average age of 39. The program was open to individuals without regard to disability status, and a substantial proportion of study enrollees were considered disabled according to criteria set by HUD. About 40 percent of Baltimore enrollees had disabilities, as did 20 percent in Houston. MyGoals coaches have reported that these disabilities are largely related to mental health. Approximately 31 percent of the Baltimore study sample, and 13 percent of the Houston study sample received Social Security or Supplemental Security Income at the time of enrollment.<sup>6</sup>

Baltimore and Houston provide two distinct contexts in which the program is being implemented. The MyGoals participants in Baltimore are generally more disadvantaged than those in Houston. Baltimore participants have poorer work histories in addition to a higher incidence of disability. They also have lower levels of education. For example, 30 percent did not have a high school diploma or GED certificate as of study enrollment, compared with 19 percent in Houston. Geography is another important difference between the two cities: Houston is much larger and spread out over a vast metropolitan area. Getting to the MyGoals office and to jobs can require traveling long distances in Houston.

The MyGoals model is challenging for staff to learn and execute. The demonstration thus includes a substantial staff training and technical assistance component, described later in this report. Adding to the challenge is the size of each coach's caseload. To contain program costs and allow participants to receive coaching over a three-year period, the model calls for a 50-to-1 participant-to-staff ratio. This number includes participants who may become inactive over the course of the program, lessening staff burden (although staff continue to make periodic attempts to reach all disengaged individuals). Ideally, the caseloads would be lower, but that would drive up the program's cost, potentially making it less viable for public funding after the demonstration. The evaluation will determine the actual average total per-person cost of the program, and its effects on participants at that level of expenditure.

## **Why MyGoals Focuses on Executive Skills**

The MyGoals model focuses on 12 specific executive skills required for goal achievement, as shown in Table 1.<sup>7</sup> These skills, vital to planning, organizing, controlling one's emotions, staying focused, and following through on tasks, are particularly important in a knowledge-based labor market that is already complicated to navigate. Access to better-paying jobs increasingly requires attaining education and training credentials, which also relies on these executive skills. They are

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<sup>6</sup>These summary statistics of participants' baseline characteristics are based on data for the first cohort of MyGoals study participants enrolled in the study between February 2017 and March 2018, for whom complete data were available at the time of publication. Data were available for 99 to 100 percent of participants in this cohort, depending on the measure.

<sup>7</sup>Guare, Dawson, and Guare (2017).

**Table 1**  
**Executive Skills Examples**

<b>Executive Skill</b>	<b>What Is It?</b>
Response inhibition	<ul style="list-style-type: none"> <li>• Thinking before speaking or acting</li> <li>• Reflecting on making decisions</li> </ul>
Working memory	<ul style="list-style-type: none"> <li>• Keeping track of things</li> <li>• Remembering what to do</li> <li>• Learning from past experience</li> </ul>
Emotional control	<ul style="list-style-type: none"> <li>• Maintaining cool</li> <li>• Handling criticism or correction</li> <li>• Controlling temper</li> </ul>
Task initiation	<ul style="list-style-type: none"> <li>• Getting started right away</li> <li>• Not procrastinating</li> </ul>
Sustained attention	<ul style="list-style-type: none"> <li>• Finishing tasks</li> <li>• Persisting at jobs</li> <li>• Staying focused</li> </ul>
Planning/Prioritization	<ul style="list-style-type: none"> <li>• Seeing path to goal</li> <li>• Deciding what is important to focus on first</li> <li>• Deciding what can be ignored</li> </ul>
Organization	<ul style="list-style-type: none"> <li>• Keeping things neat and tidy</li> <li>• Knowing where things are</li> </ul>
Time management	<ul style="list-style-type: none"> <li>• Being able to estimate how long things will take</li> </ul>
Goal-directed persistence	<ul style="list-style-type: none"> <li>• Following through to the completion of goals</li> <li>• Not being put off or distracted by other things</li> </ul>
Flexibility	<ul style="list-style-type: none"> <li>• Going with the flow</li> <li>• Revising plans in the face of obstacles, setbacks, new information, or mistakes</li> </ul>
Metacognition	<ul style="list-style-type: none"> <li>• Stepping back and taking bird's-eye view of yourself in a situation</li> <li>• Being able to monitor and evaluate yourself</li> </ul>
Stress tolerance	<ul style="list-style-type: none"> <li>• Taking it in stride when things change unexpectedly</li> </ul>

SOURCE: Adapted from Guare, Dawson, and Guare (2017).

also important for managing one's finances and building assets in a world where predatory lending is rampant and making ends meet is difficult,<sup>8</sup> and in managing family challenges and personal relationships that may interfere with getting a job, staying employed, and moving up. Setting and achieving goals in all these areas draws heavily on a person's executive skills.

MyGoals is strongly influenced by a new perspective on poverty driven by a growing body of literature rooted in neuroscience and behavioral psychology. Important contributions to that literature include the work of Jack Shonkoff and his colleagues at Harvard University's Center on the Developing Child. Their research suggests that "toxic stress" and exposure to trauma

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<sup>8</sup>For evidence about the prevalence of predatory lending and where it occurs, see Montezemolo (2013).

in early childhood that often accompany growing up in poverty may affect brain development in ways that inhibit a child’s development of executive function skills, such as impulse control, working memory, and mental flexibility — skills related to solving problems, setting goals, and making decisions.<sup>9</sup> Sendhil Mullainathan and Eldar Shafir summarize other influential research in their 2013 book *Scarcity*, which considers the ways in which living with severe resource scarcity can affect mental processes related to decision-making.<sup>10</sup> The research suggests that the constant stress that underlies the numerous daily decisions people living in poverty have to make when trying to make ends meet on very limited incomes imposes a heavy cognitive burden. That strain affects executive skills like focusing attention, initiating tasks, planning, and prioritizing. The intense focus on “getting by” economically can drain cognitive resources away from the kinds of planning, managing, and sustaining actions required for “getting ahead.”<sup>11</sup>

Recognizing the importance of executive skills, then, challenges the typical case management approach in workforce development programs that primarily focus on removing barriers (such as providing a referral to child care) and making referrals to occupational training courses. These functions may be very important, but they are likely insufficient in helping people in poverty accomplish real change. It may help account for why participants in more traditional self-sufficiency programs may not fully respond to or take advantage of these services and opportunities when they are presented, as reflected in disappointing program engagement and completion rates. The way the mind works under conditions of severe resource constraints and stress makes it difficult to focus beyond the here and now, and that may well make programs aimed at medium- and long-term career and financial improvements less likely to succeed.

MyGoals takes these considerations into account and draws on them and other aspects of behavioral psychology to provide systematic guidance, support, and incentives to promote the effective application of relevant executive skills to substantially improve self-sufficiency. MyGoals coaches are trained to understand when executive skills challenges are getting in the way of success in education, occupational training, work, and advancement, and to assist participants in addressing or working around those challenges. The intervention’s overarching focus is on personal agency: helping participants take control, learn to make and execute appropriate plans, develop more productive habits, and reap the benefits.

## Coaching in MyGoals

MyGoals combines a highly structured coaching model with a set of financial incentives to support participants in making step-by-step progress toward economic mobility over a three-year period. It uses a framework that focuses on achievements across four major domains that are important to mobility: employment and career management, education and training, financial

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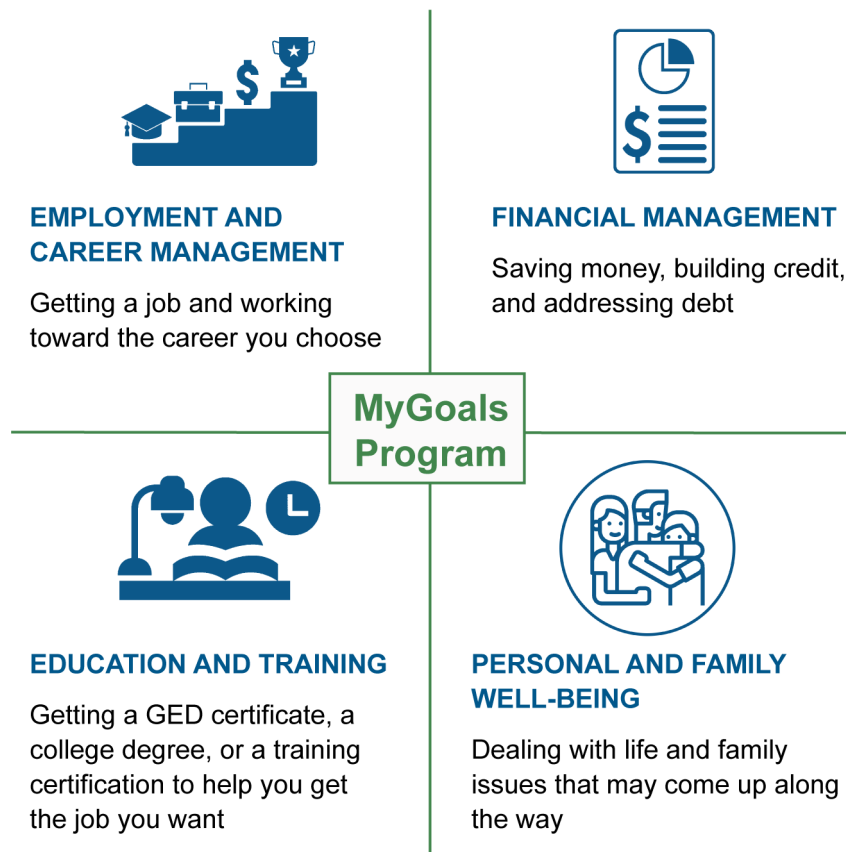
<sup>9</sup>National Scientific Council on the Developing Child (2010) and Committee on Psychosocial Aspects of Child and Family Health (2012). For a cautionary perspective on the limitations of the scientific evidence on early brain development and their implications for programs and policy, see Bruer (2015).

<sup>10</sup>Mullainathan and Shafir (2013); see also Mani, Mullainathan, Shafir, and Zhao (2013).

<sup>11</sup>Babcock (2014), drawing on the research of Carlock (2011), Casey et al. (2011), and Haushofer and Fehr (2014).

management, and personal and family well-being, as shown in Figure 1. Employment is the primary focus, but the framework acknowledges the interconnectedness of these domains — that at any given time, problems or accomplishments in one domain can affect progress in another domain.

**Figure 1**  
**MyGoals Domains**



The MyGoals program model draws on research on executive skills and behavioral interventions, and on evidence of financial incentives’ success in supporting progress in reaching employment goals.<sup>12</sup> It was also inspired directly by innovations by EMPATH, one of the first service providers to build an employment model that recognized the importance of executive skills for moving toward self-sufficiency.<sup>13</sup> EMPATH’s Mobility Mentoring<sup>®</sup> coaching process

<sup>12</sup>See Riccio and Wiseman (2017) for more details on the program’s rationale and origins.

<sup>13</sup>EMPATH stands for “Economic Mobility Pathways,” formerly known as the Crittenton Women’s Union. See Babcock (2012) for a description of their Mobility Mentoring model.

and multidomain “Bridge to Self-Sufficiency” have influenced many other service providers across the country.

An executive-skills-based coaching model developed by Richard Guare and Peg Dawson is at the heart of the MyGoals program.<sup>14</sup> Guare and MDRC adapted the model for an employment program and combined it with the four-domain framework described above, along with a set of financial incentives tied to employment. Although participants are not required to set goals in all four domains at any one time (or ever), that broader framework helps individuals understand the relevance of each of these domains to achieving economic security.

### **Highly Structured Coach-Participant Interactions**

A distinctive feature of the MyGoals program is that the coach-participant interactions are highly structured, and the coaching process follows a clearly defined set of steps. While the specific content of the coaching sessions varies greatly among participants because the content must reflect each participant’s situation and goals, the general methodology remains consistent. As shown in Box 2, it involves 12 steps, beginning with a Getting-to-Know-You discussion through which the coach tries to get a well-rounded picture of the participant’s life, background, circumstances, interests, and ambitions. Initial engagement also includes a discussion of participants’ own views of their executive skills. In subsequent steps, the coach and participant work through the goal setting process. During this process, the participant sets a long-term employment goal, discusses with the coach the prerequisites for achieving that goal, and determines which short-term goals will be important stepping-stones along the way.<sup>15</sup> The method is codified in a coaching manual and a set of forms and guidance documents used for training the coaches.

The types of goals participants set with the support of their coaches follow a specific hierarchy, illustrated in Figure 2. They include not only the long-term goals, but also intermediate milestones, very short-term SMART goals (explained below), and immediate action steps. Long-term goals are specific and concrete objectives that a participant wants to achieve. In MyGoals, this is typically entry into a specific profession or job. All participants are expected to set a long-term goal in the employment and career management domain. Some are ready to do so almost immediately, as they complete the Getting-to-Know-You discussion; some prefer to focus first on exploring career options; and some want to focus on achieving a base level of personal stability before turning their attention to setting long-term goals. Participants may also set long-term goals in the financial management and well-being domain. For example, a participant may see buying a house as a long-term goal in the financial management domain. Others may see moving to a neighborhood with less violent crime and a school system that provides more supports for their children as a long-term family well-being goal.

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<sup>14</sup>Dawson and Guare (2009); see also Dawson and Guare (2016) and Guare, Guare, and Dawson (2019).

<sup>15</sup>A coaching session may cover more than one of these steps, or it can sometimes take more than one coaching session to complete a step.

## **Box 2**

### **The 12 Steps of MyGoals Coaching**

1. Begin with the Getting-to-Know-You phase.
2. Set a long-term goal.
3. Discuss prerequisites.
4. Assess goodness-of-fit.
5. Identify obstacles.
6. Review long-term goal and revise if necessary.
7. Set milestones.
8. Set SMART goals.
9. Set action steps.
10. Discuss strategies for goal completion.
11. Review and assess action plan.
12. Decrease coaching gradually.

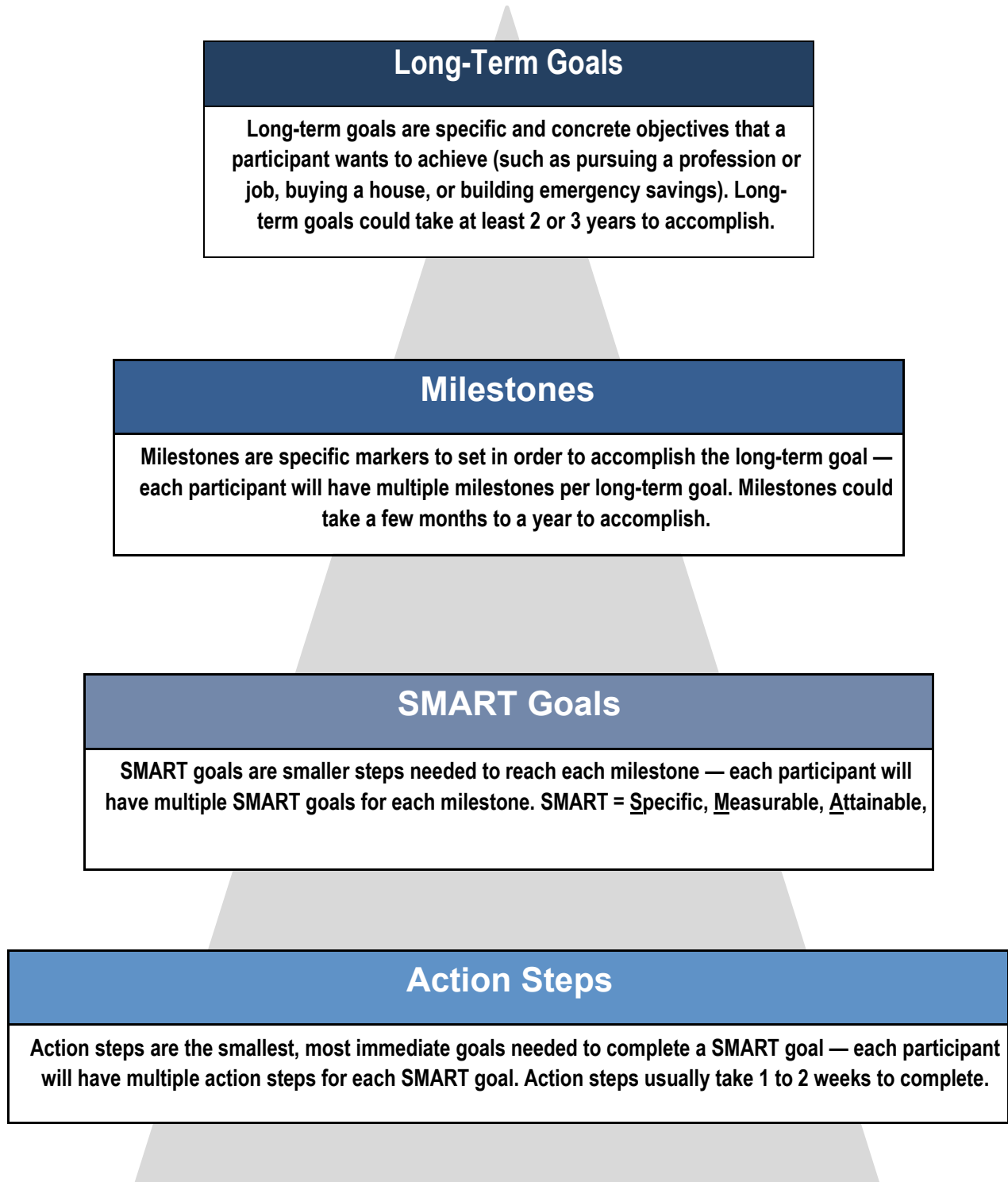
SOURCE: Adapted from Guare, Dawson, and Guare (2017).

Participants often set milestones, specific markers on the way to accomplishing the long-term goal. Often, these milestones are educational achievements, such as earning an occupational training certificate or an educational degree (for example, a GED certificate or a community college degree).

Participants can set their milestones in any domain. For example, a participant may specify getting a certified nursing assistant job as a milestone toward becoming a registered nurse. Another example might be saving a specific amount of money to purchase a car to get to a desired job. This would fall into the financial management domain and represent an achievement that supports progress toward an employment goal.

Finally, participants set short-term goals — called SMART goals — that they need to accomplish to reach a milestone. The acronym “SMART” stands for Specific, Measurable, Attainable, Relevant, and Timely. In MyGoals, “timely” means not simply within a specified timeframe; it refers to the very near term — within a matter of days or a few weeks. Typically, multiple SMART goals must be set and achieved in order to reach a given milestone. One example might be registering for an educational program. A SMART goal typically requires multiple

**Figure 2**  
**MyGoals Goals Hierarchy**



smaller, immediate steps — called action steps. For a participant who may be fearful of approaching an educational institution or an employer, an initial SMART goal might be as simple as going to the entrance of the school or the worksite and coming home and committing to calling or visiting by a certain date. The action steps would involve planning how to travel there and back, what time of day to go, whether to go alone or with a friend, or similar considerations. For other participants, an initial SMART goal might be obtaining and completing an online application form for a training program or a job, and action steps may include setting up an online account for the application, writing down a list of the application requirements, obtaining required documentation, and completing required forms.

### **Nondirective, Participant-Led Coaching**

Within this structured coaching framework, the coaching approach used in MyGoals is nondirective — meaning that the coach does not steer the participant in one direction or another, but rather lets the participant decide what goals to pursue, and how to pursue them. In MyGoals, the coach’s foundational role is building a strong, trusting, and collaborative relationship that puts the participant in charge of specifying goals within the coach-guided process.

Goals serve multiple purposes in this model: directing behavior to relevant activities, encouraging persistence, and energizing and motivating efforts to achieve them.<sup>16</sup> However, the model assumes that participants must choose their own goals if they are to be truly energized and motivated to work hard toward the goal and stick with it, even when it becomes difficult. Typical case management relationships may have a dynamic between the coach and the participant where the case manager is seen as the expert who knows what might be best for the participant and gives advice. This frame of mind shapes their interactions and can lead the case manager to steer the participant toward goals that do not necessarily reflect the participant’s own priorities and preferences. Consequently, the participant may struggle to sustain the effort to pursue the goal and may disengage from the process and the program.

Implementing a nondirective, participant-led approach requires more than simply refraining from imposing one’s own beliefs about what the “right” path is for the participant to take; it means adopting a new mindset. Coaches must believe in the capacities of the participants and honor their autonomy and self-direction. Through open-ended questions, listening without assumptions, and reflecting on what the coach hears from the participant, the coach elicits the participant’s strengths, challenges, interests, and priorities. The relationship between the coach and the participant is collaborative rather than prescriptive, and the coach plays a supportive role as the participant sets and works toward goals.

Many of these coaching elements stem from the basic principles of motivational interviewing, a counseling method that aims to help people resolve ambivalence and find the internal motivation to make a change. As coaching expert Stephen Andrew explains in an online motivational interviewing training course that MyGoals coaches take, “Working with clients in a way that is collaborative rather than prescriptive honors the person’s autonomy and self-direction and

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<sup>16</sup>Locke and Latham (2002), as discussed in Guare, Dawson, and Guare (2017).



is more about evoking than installing. This involves at least a willingness to suspend an authoritarian role, and to explore client capacity rather than incapacity, with a genuine interest in the client’s experience and perspective.”<sup>17</sup>

Coaching and motivational interviewing can be viewed as two distinct phases in the journey toward goal achievement. Motivational interviewing addresses ambivalence and helps participants identify their own long-term goals and find the internal motivation to change. Coaching picks up at the point when the participant has decided to make a change. However, the principles of motivational interviewing — including nondirectiveness, empathy, and participant self-efficacy and autonomy — permeate both phases.

Using a nondirective approach in the context of an employment program requires coaches to balance the principle of keeping their interactions with participants nondirective and the objective of providing useful, practical support. MyGoals coaches must be a resource for program participants. They have important information to share — such as potentially suitable job openings that might interest participants, or information about educational opportunities or other helpful community resources. Coaches face the challenge of sharing that information and their relevant expertise in ways that do not undermine participant control by leading participants, even if unintentionally, simply to follow the coaches’ own preferences and beliefs about what the participants should do. Participants should never conclude a coaching session with the belief that, “My coach really thinks I should do this.” MyGoals coaches can accomplish this by offering participants a range of alternatives — a set of multiple choices — while also stressing that other options may exist beyond the ones they present.

This participant-led approach requires the program to be highly personalized in nature, starting from the very first coach-participant interaction. A “needs assessment” is often the first step in a more typical case management model, usually as a one-time series of close-ended questions to identify predefined barriers or needs. The program then tends to focus on removing those barriers. In MyGoals, the process is ongoing and more tailored to each participant. Coaching begins with a Getting-to-Know-You phase that uses a set of open-ended questions as a jumping-off point for discussing the participant’s priorities, interests, hobbies, strengths, and challenges. For example, the coach might ask, “What were your favorite subjects in school?” Instead of the coach identifying a list of general needs that the participant has, the participant and the coach first set a long-term goal, then discuss the prerequisites needed for achieving that particular goal (in terms of educational or training requirements, child care, transportation, or other needs).

In addition to these strategies, MyGoals coaches use a “scaffolding” approach throughout the coaching process. With this approach, coaches provide an appropriate level of support based on the participant’s need, and the support decreases over time as the need lessens. Coaches may take a more hands-on approach helping some participants make progress on their early action steps — for example, sitting with participants at a computer to help them find and navigate job

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<sup>17</sup>Andrew (2015).

search websites or a particular employer's careers website. As participants become more proficient at online job searches, coaches can reduce the time spent sitting with them at the computer.

### **A Focus on Executive Skills**

The MyGoals coaching model is based on the premise that if participants have a good understanding of their own executive skills strengths and challenges, they can use that knowledge to set goals that align with their executive skills profiles, leverage their executive skills strengths to accomplish their goals, and develop strategies to overcome problems their executive skills challenges may present on the way to accomplishing their goals.<sup>18</sup> A focus on executive skills is threaded throughout multiple steps in the coaching process, reflecting this theoretical rationale.

#### *Participants' Understanding of Their Executive Skills Strengths and Challenges*

Participants make an initial assessment of their own executive skills strengths and challenges during their first Getting-to-Know-You coaching session. After the broader initial discussion of the participants' background, interests, and strengths and challenges, coaches ask the participants to complete a questionnaire, called the Executive Skills Questionnaire (ESQ).<sup>19</sup> Before asking participants to complete this tool, coaches show and review the results of their own ESQs, emphasizing their own challenges and strengths. This is meant to put participants at ease by showing that all people have challenges to overcome and strengths they can use in achieving goals. The questionnaire asks participants to rate themselves on three items under each of the 12 executive skills. Both the participants and the coaches get a first glimpse of the participants' executive skills pattern of strengths and challenges. It is not intended to be a diagnostic tool. Rather, it is simply a starting point in the coaching relationship through which the participants learn about the concept of executive skills and the coaches get initial insights into the participants' executive skills profile.

As the individual coaching sessions proceed, certain potential executive skills challenges may be revealed that the participant did not identify during the initial assessment. For example, a participant with a high self-rating on emotional control may get fired from a job after a heated argument with the boss. This incident would prompt a discussion between the coach and the participant about this executive skill and would lead to the coach supporting the participant in developing strategies to prevent this situation from repeating itself. Also, the coach may notice certain behaviors after a few coaching sessions — such as a participant frequently arriving late to sessions or not showing up and giving no prior notification — that could also expose time management challenges that may be affecting the participant in other areas of life and might impede progress toward the participant's goals if left unaddressed.

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<sup>18</sup>Guare, Dawson, Guare (2017).

<sup>19</sup>The Executive Skills Questionnaire included in the coaching manual is adapted from Dawson and Guare, (2016).

A participant's executive skills profile is an important consideration when determining the appropriate fit of a long-term goal (what the model refers to as "goodness-of-fit"). For participants to be motivated by a goal, they should feel confident that the goal is attainable. The coach and participant collaboratively assess whether the goal is a good fit with the participant's interests, experience, and training — and where there is a gap, whether the participant has the supports in place to make bridging that gap feasible.

A distinctive feature of the MyGoals coaching model is that in addition to assessing fit in terms of interest and background, the participant and coach also assess whether the goal is a good fit with the participant's executive skills profile. For example, a participant who is strong on flexibility and stress tolerance and has a goal of becoming a hospital nurse will recognize that those strengths will be valuable in this high-pressure environment with a high level of unpredictability. Conversely, after assessing the fit between a goal and the executive skills profile, a participant who struggles with response inhibition and emotional control may think twice about the ability to thrive in a conflict-ridden customer service job, where customers are constantly confronting customer service representatives with complaints.

### *Addressing Executive Skills Challenges with Coaching*

If participants identify executive skills challenges that may hinder their ability to thrive in a particular type of job, it often does not mean that they have to abandon that goal entirely. Instead, the coach can support the participant in thinking through scenarios in which such a challenge may arise in the context of that job and in developing strategies to work around the problem. Similarly, if the coach or participant becomes aware of an executive skill challenge during the coaching process that may present problems in multiple scenarios, the coach can support the participant in developing more general workarounds, so the participant is more prepared to address the challenge effectively whenever it arises. MyGoals coaches are trained in three such strategies: environmental modifications, cognitive rehearsals, and situational incentives:

- **Environmental modifications** involve changing the situation or the task to make it easier to accomplish the task. For example, a participant who struggles with getting to work on time (a time management issue) because it takes too long to decide what to wear in the morning might set out clothes the night before. A person who has difficulty sustaining attention when working on certain tasks can assess the environment to determine whether any distractions can be eliminated, such as finding a quieter place to work. Or, a participant who struggles with task initiation can try to break up a task that feels overwhelming into smaller, more manageable steps and build in breaks in between.
- **Cognitive rehearsals** are a technique that can help participants mentally prepare for situations that they anticipate may tax certain executive skills. Using this strategy, participants first specify how they plan to behave in a particular situation or complete a task — an "implementation intention." Next, the participants visualize completing a task and the positive consequences of doing so and then imagine what obstacle might get in the way of completing the task

— “mental contrasting.” Then they rehearse or walk through verbally, with their coach, the beginning-to-end process of setting out to complete the task, encountering the obstacle, overcoming the obstacle, and successfully completing the task — “mental simulation.” For example, participants who struggle with punctuality might use a cognitive rehearsal to help them get to a job interview on time: verbally walking through the steps to leave their house an hour earlier than necessary, envisioning getting into their car and the car not starting, then walking to the bus stop and taking the bus instead, arriving at the interview early, unrushed, and prepared.

- **Situational incentives** are rewards that participants choose for themselves after completing a task, as a boost to their motivation. For example, a participant might define watching television as the reward for completing a job application — and not watch it until the application is submitted.

## MyGoals Financial Incentives

MyGoals uses financial incentives to support engagement and to signal and underscore the program’s employment focus. Participants earn a \$50 “Getting Started Bonus” for completing the initial Getting-to-Know-You session. Following this first session, participants can earn an ongoing engagement \$30 monthly stipend for meeting a minimum program participation/engagement standard. This payment is made only if the participant engages in at least one substantive coaching session that month, in which goals, action steps, and progress are reviewed and discussed. (This monthly contact is a minimum requirement; coaches and participants are expected to communicate multiple times per month, even if only by text, emails, or phone calls, as appropriate.)

MyGoals also offers financial incentives tied to work. Participants can earn stipends both for employment transitions (from not working to working part time, from not working to working full time, from working part time to working full time) and employment retention (initially for sustaining work at least three months, then at six-month retention increments).

This use of incentives is consistent with behavioral science literature that emphasizes the potential importance of rewarding progress for intermediate steps as part of a process to help people succeed in accomplishing long-term goals. Rewards also can help to offset the tendency to focus attention on *current* problems at the expense of taking steps that ultimately lead to substantive improvements of their situations when living with scarcity.

The MyGoals work incentives are adapted from financial incentives that MDRC tested as part of the New York City Work Rewards demonstration. That study incorporated a test of the Family Self-Sufficiency (FSS) program — funded by the U.S. Department of Housing and Urban Development and operated by the New York City Department of Housing Preservation and Development — which offered employment guidance and service referrals combined with a long-term incentive and savings program (that made payouts only after successful completion of the

five-year program).<sup>20</sup> In the Work Rewards randomized trial, Housing Choice Voucher recipients were assigned to one of three groups: a group offered the regular FSS program; a group offered FSS plus extra financial incentives conditioned on sustaining full-time work (and paid every two months); or a control group that received neither FSS nor the financial rewards. The study found that among participants who were not working at the time of random assignment, those offered the combination of FSS plus the more immediate financial incentives had substantially better labor market outcomes over a six-year follow-up period than individuals assigned to the control group, and also better outcomes than those who were offered FSS without the special incentives. This evidence encouraged the MyGoals designers to target MyGoals toward nonworking voucher holders and include a work incentives component in the program model.

## Other Components of MyGoals

In addition to the executive skills-based coaching and financial incentives, MyGoals includes several other important components:

- **User-friendly labor market information.** The MyGoals program provides participants with current local labor market information to help inform their employment and career decisions. This includes information about top employers hiring in the area, skills desired by employers, and the education and experience necessary for those jobs. Coaches use occupational profiles, called “shallow dives,” to show information about occupations of documented interest to MyGoals participants. Some examples are customer service representative, construction foreman, health information technician, and warehouse worker. Job profiles include average salaries, demand (based on the number of online ads posted by top employers hiring in the area), and the education level required for a specific occupation. Profiles also outline which skills employers are seeking in each occupation and include the names and websites of the largest employers in the area that are hiring for those specified positions. MyGoals coaches use these profiles either to start or inform ongoing conversations with participants based on their expressed interest in specific fields or jobs. MDRC contracted with the New York City Labor Market Information Service at the City University of New York to produce these resources for the two MyGoals sites. These sets of occupations are tailored for each site, and the information is updated quarterly based on participants’ expressed interests as identified by the MyGoals staff.
- **Supporting financial management skills.** MDRC partnered with two organizations — first the Financial Clinic, based in New York City, and then the CASH Campaign of Maryland — to provide specialized training to coaches on topics related to building financial stability and developing financial management skills. Training topics include building assets and savings, daily

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<sup>20</sup>Verma, Yang, Nuñez, and Long (2017).

money management, credit and credit scores, and using the Earned Income Tax Credit. Although MyGoals coaches are not expected to be financial experts themselves, these training sessions equip coaches with the basic knowledge and tools needed to support participants' financial management goals. Coaches can refer participants who need more expert financial assistance to appropriate community resources.

- **Referrals to community resources.** MyGoals coaches refer participants to local service providers for needs that fall outside the scope of the coach's role. This could cover mental health services, education services, child-care assistance, and health care. MyGoals coaches are expected go beyond making referrals and tracking participants' take-up and completion of these services. Coaches are expected to apply the same goal setting and supporting processes central to the MyGoals model. For example, if a participant identifies a need and desire for mental health services, this would prompt goal setting in the personal and family well-being domain. The coach would help identify services options from which the participant might choose, develop SMART goals and action steps focused on efforts to obtain information on the mental health service provider, and support the participant on following through to obtain the needed services. Subsequent coaching sessions would address any executive skills challenges getting in the way of the participant receiving those services, such as time management, task initiation, or persistence issues, as well as any other impediments to obtaining the desired treatment.

## **Building Coaches' Capacity**

The MyGoals coaching model, with its well-specified coaching protocol, was designed to be learned and applied by staff without formal backgrounds in social work or psychology. The people applying it would have backgrounds and qualifications similar to case managers in other employment and training programs. When the MyGoals program recruited coaches, it sought professionals who understood the local labor markets and the local communities' workforce development systems and resources. Experience with motivational interviewing, a technique commonly applied during the MyGoals coaching relationship, was highly desired but not required. All staff took an online motivational training course when they joined the program.

The coaches and supervisors hired for the first MyGoals cohort represented a diverse set of educational and professional backgrounds.<sup>21</sup> All had some experience with case management, and most had some workforce development experience. Few had prior experience with motivational interviewing. All held a bachelor's degree, and several also held a master's degree.

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<sup>21</sup>Data on characteristics of MyGoals staff for the second cohort were not yet available at the time of this report's publication.

Coaches participated in multiday, in-person training sessions organized by MDRC at the start of the program, generally after they had completed their online motivational interviewing training course. These were followed by refresher training sessions and supplemented with ongoing technical assistance, which will continue for the duration of the program. This technical assistance is intended to help coaches implement the MyGoals model with fidelity, answer their questions, troubleshoot problems, and continuously improve their practice.

As part of this ongoing training and support, psychologist Richard Guare, who developed the MyGoals executive skills coaching methodology, conducts individual and group case conferences with the coaches from each site. Coaches walk through their experiences with selected participants, and Dr. Guare provides guidance on each case, pointing out where their handling of the case is or is not consistent with the MyGoals coaching principles and guidelines. He offers suggestions on how they can improve their practices, and how they might consider handling certain issues with particular individuals they are coaching.

MDRC's technical assistance team also meets regularly with coaches, through phone calls and in-person site visits. The staff offer guidance to help the coaches implement the coaching model, the financial incentives, and other MyGoals features. They also developed strategies to address initial study recruitment challenges and prepared and updated multiple implementation guidance documents for the coaches using a collaborative approach. They worked closely with an external vendor to develop and train staff on a management information system to keep track of participants' goals, action steps, and accomplishments.<sup>22</sup> They also work with the sites to monitor data quality and to address any issues with staffing, management, budgets, contracts, and other administrative needs.

## **Future Reports**

Although the MyGoals demonstration is taking place within two housing agencies and serves recipients of federal housing assistance, the program's core coaching principles and components are not designed specifically for an assisted housing population. Indeed, the model may be suitable for a wide range of employment programs and groups. Thus, it is hoped that the evaluation findings will have broad relevance.

As mentioned previously, MDRC has partnered with Mathematica to evaluate MyGoals as part of its HHS-funded multisite evaluation of four coaching programs for low-income populations. In addition to MyGoals, the study includes three other coaching programs: the Family Development and Self-Sufficiency program in Iowa; the Goal4 It! Program in Jefferson County, Colorado; and the LIFT program in Los Angeles, New York City, and Chicago.

Reports describing the implementation of MyGoals and the other three coaching programs will be released later this year. Abt Associates, in partnership with Mathematica, is con-

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<sup>22</sup>The MyGoals program uses a customized version of Tracking at a Glance (TAAG), developed by Designing Success as its management information system.

ducting an early process study to understand how each of these coaching programs was implemented and is operating. Another, later report by Mathematica and MDRC will focus on the operation of MyGoals as it matures and will analyze the program's impacts. That report will compare the outcomes of MyGoals participants with those of the individuals randomly assigned to the control group.

The impact analysis will show the causal effects of MyGoals on participants' labor market outcomes, receipt of housing subsidies, and receipt of TANF and SNAP benefits, using administrative records data, and on a wide range of other outcomes based on participant surveys.<sup>23</sup> Mathematica is fielding follow-up surveys at one year and two years after individuals enroll in MyGoals. These surveys will provide data on psychological measures pertaining to self-regulation, as well as on a range of employment, education, training, financial, housing, and well-being outcomes. Mathematica will collect similar data for the three other coaching programs in its study. It intends to prepare separate reports on those programs as well as cross-site reports.

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<sup>23</sup>These administrative data will include wage data from the National Directory of New Hires, housing subsidy data from the two participating public housing agencies, and administrative data on TANF and SNAP subsidy receipt and amounts from the welfare agencies in each state.



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