



## Human Services Issue Brief

Michelle Derr and Kristen Joyce

# Options for Building Coaching Practices into TANF Programs: A Comparison of Five Models

Research has shown that poverty and other chronic stressors can hinder people from developing and fully using the skills needed to set, pursue, and achieve personal goals, including finding and maintaining employment. For this reason, living in poverty might derail people's pursuit of economic security. Coaching—in which trained staff members work with participants to set individualized goals and provide support and feedback as they pursue those goals—has drawn increasing interest as a way to help low-income people realize career and family goals.

This resource is for Temporary Assistance for Needy Families (TANF) program administrators who are interested in adopting coaching practices within their programs. It includes matrices that compare five employment coaching models that are in use today with TANF-eligible populations: four being used directly in a TANF setting and one that can be adopted to a TANF setting. None has been included in a rigorous evaluation in a TANF setting, although two are currently being tested as part of a federal randomized controlled trial of coaching interventions. The five models are:

Mathematica developed this resource through Project IMPROVE. Project IMPROVE is an innovative technical assistance project sponsored by the Office of Family Assistance (OFA). Under this project, Mathematica works with state and local TANF programs to increase their capacity for evidence-informed program innovations that improve the economic security and self-sufficiency of low-income families.

- **Family-Centered Coaching**, developed by a team of experts convened by the W.K. Kellogg Foundation. Its objective is to support parents and families holistically in moving toward their goals and greater economic prosperity. The model is built on five core values: (1) a focus on the entire family, (2) family-led, (3) respect of the family, (4) strengths-based, and (5) racial inclusion and equity. Family-Centered Coaching is managed by The Prosperity Agenda, a nonprofit organization.
- **Goal4 It!™**, developed by Mathematica in partnership with behavioral scientists and practitioners. Goal4 It!™ aims to shift public agencies from focusing on transactional, compliance-driven interactions to engaging in meaningful exchanges that activate participants' motivation and commitment to change. The Goal4 It!™ framework was designed to build skills and create habits around pursuing goals using a four-step process—Goal, Plan, Do, Review/Revise—to

improve outcomes for children and families. It is built on three primary strategies: (1) reducing external sources of stress, (2) strengthening core life skills, and (3) creating responsive relationships within and beyond the program.

- **Human Services Coaching Framework**, developed by Public Consulting Group. The Human Services Coaching Framework has three core principles: (1) person-centered, (2) relationship-based, and (3) goal-driven. It is designed to help participants identify their most important goals and motivate participants to achieve them. Public Consulting Group works primarily with public sector agencies to develop multidisciplinary and sustainable solutions that improve their performance and processes. This model was specifically designed for TANF employment case managers, but it has been used in Workforce Innovation Opportunity Act (WIOA) programs and can be adapted for other workforce and public support programs. Front-line staff trained in the Human Services Coaching Framework help people direct, own, and experience the changes that they want to see in their lives.
- **MyGoals for Employment Success (MyGoals)**, developed by MDRC and neuropsychologist Dr. Richard Guare. MyGoals uses a coaching model and incorporates financial incentives tied to participant engagement and employment outcomes. It is designed to help participants' address challenges

in executive functioning skills that get in the way of achieving their goals. It involves sustained interaction between participants and coaches over a three-year period. The MyGoals coaches help participants set and achieve goals in four domains: (1) employment, (2) education and training, (3) financial management, and (4) personal and family well-being.

- **Mobility Mentoring®** developed by EMPATH (Economic Mobility Pathways). This model is designed to help participants acquire the resources, skills, and sustained behavior changes necessary to attain and preserve economic independence through the professional practice of participant collaboration. Mobility coaches co-invest with families and offer a network of resources based upon participants' goals in developing adult capabilities. Goal setting, action plans, earned incentives, recognition, and self-belief and awareness are key elements of upward economic mobility coaching.

The information presented in this brief is based on responses to a questionnaire that Project IMPROVE sent to the developers of each coaching model in June 2018. Nothing in this resource should be construed as an endorsement by the Administration for Children and Families (ACF), Office of Family Assistance (OFA). Practitioners who are interested in any of the coaching models discussed in this resource should contact the developers directly with questions, as well as to obtain the most current updates.

**Model background and program implementation**

	<b>Family-Centered Coaching</b>	<b>Goal4 It!™</b>	<b>Human Services Coaching Framework</b>	<b>MyGoals for Employment Success</b>	<b>Mobility Mentoring®</b>
<b>Year of initial pilot</b>	2016	2016	2014	2017	2009
<b>Primary designers and researchers</b>	Several independent consultants under the leadership of W.K. Kellogg Foundation and the Center on Budget and Policy Priorities	Mathematica, Harvard Center on the Developing Child, behavioral scientists, and practitioners	Public Consulting Group with TANF program operators	MDRC with Dr. Richard Guare	EMPath
<b>Description of organization</b>	The Prosperity Agenda works to end persistent poverty by partnering with other nonprofit organizations, government agencies, financial institutions, and employers to design solutions for scale.	For 50 years, Mathematica, a nonpartisan research organization, has been committed to improving public well-being through objective, high quality research, evaluation, and decision support.	Public Consulting Group is a leading public sector management consulting and operations improvement firm that partners with health, education, and human services agencies to improve lives.	MDRC is a nonprofit, nonpartisan education and social policy research firm with more than 40 years of experience designing and evaluating interventions aimed at improving the lives of low-income individuals, families, and children.	EMPath, formerly Crittenton Women's Union, was founded through the merger of two nonprofit organizations that each had more than a century of experience advocating for low-income women and families and providing services to improve their economic self-sufficiency.
<b>Used in TANF programs</b>	Yes	Yes	Yes	No	Yes
<b>Other programs or areas in which model is used</b>	Workforce, early education, community action	Workforce, employers, youth	Workforce	Housing	Housing, early learning and care, community development initiatives, and health care
<b>Organizational readiness assessment</b>	Self-administered	Conducted by Mathematica	Conducted by Public Consulting Group	None	Conducted by EMPath
<b>Cost per participant</b>	Not determined	Not determined	Varies	Roughly \$8,500 per participant for three years	Varies
<b>Rigorous evaluation of impacts</b>	No, however an evaluation of the foundational aspects of the model is in progress.	In progress	No	In progress	No, however a quasi-experiment was completed in the early learning setting.

	Family-Centered Coaching	Goal4 It!™	Human Services Coaching Framework	MyGoals for Employment Success	Mobility Mentoring®
<b>Defined caseloads</b>	No defined caseload size prescribed	No defined caseload size prescribed	No defined caseload size prescribed	Optimal caseload size is 50	Optimal caseload size is less than 40
<b>Training mode(s)</b>	In person	In person	In person; a 14-module virtual training is in development	In person plus conference calls and webinars, as appropriate	In person; virtual training options are in development
<b>Initial staff training size</b>	Up to 30 staff	No restrictions	More than 25 staff	More than 12 staff	10–100 staff
<b>Initial staff training length</b>	3–4 days	1.5–2 days	12 hours of training over 2 days (ideally spaced 2–4 weeks apart)	2–3 days	2 days
<b>Ongoing support for staff</b>	Webinars and learning community available	Office hours to provide ongoing consultation; “Goal4 It!™ groups” for case managers to discuss difficult cases and implementation successes and challenges	Training on coaching circles and peer learning; monthly coaching tips; surveys to assess progress and model adherence	Regular check-in meetings with MDRC staff; targeted and booster trainings available by webinar	Monthly webinars and online resource portal
<b>Train-the-trainer model availability</b>	Yes	In development	Yes	No	Yes
<b>Cost of training</b>	Base cost of \$9,375; varies by organizational needs	Varies	Varies; technical assistance (TA) is priced separately from the model	Not yet determined	Call for quote
<b>Supervisor training and support</b>	Supervisors and coaches are trained together; post-training webinars, learning community	Supervisors attend coaching training; additional Goal4 It! Professional (Pro)™ training and suite of supervision tools	Supervisors receive coaching training (adapted for them) before coaches; monthly coaching tips; additional leadership training	Supervisors and coaches are trained together; supervisors receive TA as needed	Quarterly, two-day training on supervisor curriculum; supervisors receive TA weekly and monthly; webinars and learning community
<b>Assessment</b>	Assessment for the parent’s readiness for change and goal-setting, and the suggested approach for each stage.	Stepping Stones to Success: covers 11 life areas	Uses existing program assessments and tools	Executive function skills assessment; plus review of interests, experiences, and credentials	Bridge to Self-Sufficiency and executive function skills assessment

	Family-Centered Coaching	Goal4 It!™	Human Services Coaching Framework	MyGoals for Employment Success	Mobility Mentoring®
<b>Work participation requirements (WPRs)</b>	Provides guidance for meeting WPR through coaching.	Uses Goal Practice Activities to reframe the language used to introduce federal work activities to clients	Adaptable to existing program requirements. Provides guidance for addressing WPR through coaching.	Approach may be challenging to implement in a program environment that imposes work requirements.	EMPath technical assistance staff work with program to ensure it meets requirements.
<b>Format of coaching interactions</b>	Scripts and agendas for meetings are provided in toolkit; typically, interactions are in person	Individual or group sessions; in person or virtual	Meetings can be in person or virtual	In person, supplemented with phone and electronic communication	Individual or group sessions; in person or virtual
<b>Frequency of coaching interactions</b>	No recommendation	At least monthly	No standard recommendation; can provide one based on each agency's needs	Monthly, and extra as appropriate	At least 12 hours of in-person contact per year
<b>Approach to goal setting/planning</b>	Uses Plan, Do, Review to identify a larger goal and then set smaller goal(s), make a plan for how to reach that goal, and carry out the plan with support and accountability.	Uses a four-step process (Goal, Plan, Do, Review/Revise)	Introduces model of "Plan, Build, Achieve, Persist"; Uses SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals as example, but can be adapted to any framework	Uses SMART goals, milestones, and longer-term goals	Uses SMART goals, regular goal reflection, and incentivized and positively reinforced goal completion
<b>Approach to addressing/resolving barriers</b>	Toolkit provides guidance on when and how to respond to a family in crisis by applying a fluid approach and then move towards goal setting.	Resolves issues in relation to goals, "potholes," and "detours" (if/then plans); used with families in all conditions	Use of motivational interviewing and coaching techniques to help participants overcome barriers and setbacks	Coaches engage participants in motivational interviewing to identify goals and prerequisites and potential barriers to achieving those goals. If necessary, coaches pause coaching to respond to emergency needs by making referrals to other agencies	Designed to be highly individualized and adaptable to families in any circumstance

	<b>Family-Centered Coaching</b>	<b>Goal4 It!™</b>	<b>Human Services Coaching Framework</b>	<b>MyGoals for Employment Success</b>	<b>Mobility Mentoring®</b>
<b>Approach to monitoring and tracking progress</b>	Goal-setting tools facilitate tracking and monitoring	GoalReview includes RAP (Review, Assess, Plan) sessions	Uses existing program monitoring and tracking tools and measures; leverages Public Consulting Group's Coaching Mindset Survey to assess effectiveness and impact	Coaches use a special management information system to track goals and progress against goals.	Monthly and quarterly reporting process; goal action tool tracks goals and action steps
<b>Model explicitly involves use of financial incentives</b>	No	No	No	Yes	Yes, but can be offered without financial incentives
<b>Length of program enrollment</b>	Not specified	Defined by program	Not specified	3 years	1 year or more

## Family-Centered Coaching

**Designer/developer.** The toolkit was developed by Martha Oesch, Sarah Griffen, Karen Murrell, and Shelley Waters Boots under the leadership of both the Center on Budget and Policy Priorities (as a part of Building Better Programs) and Paula Sammons of the W.K. Kellogg Foundation.

**Funder.** The W.K. Kellogg Foundation

**Year of initial implementation.** 2016

**Approach to model design and initial implementation.** The model was in consultation with a group of 10 advisors and 17 topic experts who represented community organizations, public-sector practitioners, and families. It was refined through an 18-month pilot process through practice with 20 coaches, and will continue to be refined by The Prosperity Agenda. The science-informed approach builds on techniques from motivational interviewing, strength-based case management practices, and coaching. It includes best practices from the transtheoretical model of behavior change (stages of change), trauma-informed care, behavioral economics, and executive skill building.

**Population(s) and sites with which model has been implemented.** Three states (Georgia, Michigan, and Washington) are currently planning to use the model in a TANF setting, while Maricopa County (Arizona) and Arkansas are implementing it in workforce development and other public services. The model is also being used in early education programs in Georgia (Enrichment Services), Oklahoma (CAP Tulsa), and Washington (Snohomish County Early Childhood Education & Assistance Program). Oweesta First Nations has adapted the model to enhance its Building Native Communities training. Programs that have fully implemented the model include Brighton Center (Kentucky), Goodwill Industries of Central Michigan's Heartland, and Family Futures Downeast (Maine).

**Site readiness assessment and preparation.** Organizations self-administer an organizational assessment to measure their readiness for coaching.

The assessment gauges the organization's coaching culture and whole-family approach to understand how the organization currently aligns with the Family-Centered Coaching approach. The assessment identifies strengths, needs, and opportunities for change. It serves to give supervisors concrete issues to address in the program environment.

**Alignment with TANF federal work requirements.** The model was designed to be adapted for eligibility-based program settings like TANF. The toolkit provides guidance for integrating program requirements into the coaching process. Coaching tools and activities incorporate monitoring and tracking of goals and program requirements.

**Coaching framework and process.** A toolkit contains tools for building a family-focused, coaching mindset, addressing the whole family. It applies integrated lessons from trauma-informed care, executive skills development, and behavioral economics. It includes seven content modules: Child Well-Being and Parenting; Employment, Education, and Career; Legal; Financial; Health and Well-Being; Family, Friends, Relationships; and Basic Needs - Food, Housing, Transportation, Safety. A step-by-step guide to the 6 Steps to Family-Centered Coaching leads coaches through a process to engage families to meet their goals—each with accompanying tools and resources for both parents and coaches. Central to the model is fluidity, an approach in which the coaches work together with parents to discern a family's readiness for change. Based on what they learn, coaches might use a variety of approaches when working with parents, ultimately moving toward a goal-setting approach that supports changes the family wants. The model is customizable to the needs of the program.

**Coaching resources and tools.** The modularized toolkit includes a step-by-step guide and scripts for coach and parent interactions. These are available for free and practitioners are encouraged to apply and adapt the toolkit to program goals and requirements. The resources can be used in several different ways to support the initial training of staff and partners in family-centered coaching,



ongoing training and assessment of a family-centered coaching approach across a program and/or partnership, and a coach's preparedness to practice family-centered coaching daily. Supervisor tools are under development and will include tools for hiring, messaging for funders, and evaluation tools.

**Recommended caseload size.** The model is adapted to an agency's current staffing. No caseload size is defined.

**Experience, abilities, and skills of staff to use model.** Key skills for staff are not defined.

**Recommended frequency of interaction between staff and participant.** No recommendations.

**Staff training and support.** Initial training teaches staff coaching competencies. Optimal group size for training is up to 30 people. Uses a train-the-trainer model. Training costs \$6,000 to \$12,000, not including travel, customization of tools or content, or ongoing technical assistance. Post-training webinars and a learning community are available. The Prosperity Agenda has developed a train-the-trainers model with additional technical assistance to increase the number of certified trainers available.

**Supervision training and resources.** Supervisors receive the same training as coaches. An organizational guide provides two organizational assessments, steps to move towards a coaching and

family-led environment, and guides for creating partnerships and local resource guides that support the model.

**Intended outcomes.** Outcomes include greater economic prosperity, understanding of personal decision-making capabilities, confidence in ability to set goals and overcome barriers, achievement of personal milestones, achievements related to family management and family goal setting, and achievement of employment and other goals.

**Rigorous evaluation of effectiveness.** Although not specifically of the Family-Centered Coaching model, the results of a randomized controlled trial that evaluated the foundational coaching approach in TANF is in process.

**Tools and resources in development.** Supervisor tools include: Hiring Coaching-Inclined Individuals, Finding Coaching-Inclined Funders, Funding Coaching-Inclined Organizations, and Person-Centered Program Design. Evaluation tools include Strength of a Coaching Relationship and Coaching Maturity Index). A series of bi-monthly training videos began in October 2018.

**Point of contact for coaching model.** Rachel Brooks, Innovation Marketplace Director, The Prosperity Agenda, at [rachelb@theprospertyagenda.org](mailto:rachelb@theprospertyagenda.org), [www.familycenteredcoaching.org](http://www.familycenteredcoaching.org) or (206) 973-2294.



## Goal4 It!<sup>TM</sup>

**Designer/developer.** Mathematica

**Funder.** Multiple funders

**Year of initial implementation.** 2017

**Approach to model design and initial implementation.** Goal4 It!<sup>TM</sup> is a science-informed approach to delivering human services and workforce programs in a way that activates a person's motivation and commitment to change. It was developed in partnership with behavioral and social scientists, researchers, and practitioners. The developer iteratively tested and refined tools and processes over a one-year period in four sites.

**Population(s) and sites with which model has been implemented.** Goal4 It!<sup>TM</sup> has been implemented in eight states—California, Colorado, Illinois, Maryland, Michigan, Minnesota, Ohio, and Pennsylvania. It is used in TANF, workforce, and youth programs as well as in Employer Resource Networks in Michigan.

**Site readiness assessment and preparation.**

Mathematica researchers conduct virtual or on-site assessment of the program before implementation. Assessment focuses on sites' readiness for change and how Goal4 It!<sup>TM</sup> might be integrated into existing services.

**Alignment with TANF federal work requirements.**

The model applies a process—called Goal Practice Activities—that uses federal work activities to practice and build self-regulation skills necessary to achieve goals.

**Coaching framework and process.** Goal4 It!<sup>TM</sup> is rooted in a four-step process for setting and achieving goals. The four steps are (1) GoalSet, (2) GoalPlan, (3) GoalDo, and (4) GoalReview/Revise. The steps are linked to a broader set of strategies for improving child and family outcomes by strengthening core skills, reducing sources of stress, and supporting responsive relationships.<sup>1</sup>

**Coaching resources and tools.** Goal4 It!<sup>TM</sup> uses a structured curriculum and tools to support goal pursuit.

**Recommended caseload size.** No specific caseload recommendations.

**Experience, abilities, and skills of staff to use model.**

Goal4 It!<sup>TM</sup> is designed to work with existing staff. Goal4 It! Professional (Pro)<sup>TM</sup> defines staff behaviors and competencies to implement the model.

**Recommended frequency of interaction between staff and participant.** At least monthly.

**Staff training and support.** Training includes a 1.5- to 2-day initial training followed by a "road test" to collect data from staff, and in some cases participants, to refine the implementation and integration into existing services. The model also includes Goal4 It!<sup>TM</sup> groups with supervisors and staff within the site, and regular virtual "office hours" with Mathematica experts to support implementation. Cost of training and ongoing support varies.

**Supervision training and resources.**

Goal4 It! Pro<sup>TM</sup> includes a full suite of supervision tools to support the Goal4 It!<sup>TM</sup> practice model. Goal4 It! Pro<sup>TM</sup> includes competency-based behaviors for staff to implement the model within four domains: (1) relationship skills, (2) goal pursuit skills, (3) managing the job, and (4) professional development. The goal pursuit process between supervisors and staff mirrors the process between staff and participants.

**Intended outcomes.** Outcomes include increased engagement, employment outcomes (for example, job placement, job retention, and wages), and improvements in goal-directed behaviors.

**Rigorous evaluation of effectiveness.** A Goal4 It!<sup>TM</sup> site in Jefferson County, Colorado, is currently participating in the Evaluation of Employment Coaching for TANF and Related Populations, a federally funded randomized controlled trial of coaching interventions. Results are expected by 2021.

**Tools and resources in development.** Goal4 It!<sup>TM</sup> for organizational change is underway, with the intent to create the conditions in program structure, culture, and leadership that support Goal4 It!<sup>TM</sup>.

**Point of contact for coaching model.** Michelle Derr, Senior Fellow at Mathematica, [mderr@mathematica-mpr.com](mailto:mderr@mathematica-mpr.com) or (202) 484-4830.

## Endnote

<sup>1</sup> Center on the Developing Child. "Three Principles to Improve Outcomes for Children and Families." Cambridge, MA: Harvard University, Center on the Developing Child, 2017.

## Human Services Coaching Framework

**Designer/developer.** Public Consulting Group

**Funder.** Not applicable

**Year of initial implementation.** 2014

**Approach to model design and initial implementation.** The framework was created through research and collaboration with an interdisciplinary team of Public Consulting Group consultants and TANF program operators. The Human Services Coaching Framework is currently in its third major iteration after practical application in human services programs.

**Population(s) and sites with which model has been implemented.** The framework has been used in three county TANF programs: Ramsey County, Minnesota; San Diego County, California; and Lane County, Oregon. It has also been used in WIOA programs in Ramsey County and Lane County.

**Site readiness assessment and preparation.** Public Consulting Group will work with any agency that is willing to adopt the framework. Agencies should be ready to work through organizational changes that may be necessary to adopt the framework. Case managers may have to change from a focus on the work participation rate (WPR) to a focus on individual participant goals.

**Alignment with TANF federal work requirements.** The framework is specifically designed for TANF employment case managers. The curriculum addresses common challenges in TANF programs, such as WPR and sanctions. The framework includes guidance on how to look at the WPR in a participant-centered way and use coaching to help participants set personal goals as well as comply with federal work activities.

**Coaching framework and process.** The framework emphasizes three core principles to ensure that interactions with participants are (1) person-centered,

(2) relationship-based, and (3) goal-driven. The model is fully adaptable to meet the needs of programs.

**Coaching resources and tools.** Public Consulting Group provides tools and approaches to ensure fidelity to the framework including additional leadership training for coaches, supervisory training, coaching circles, monthly coaching tips, and surveys to assess progress and model adherence. The framework also leverages existing tools that jurisdictions use, such as those used for goal-setting and monitoring.

**Recommended caseload size.** No specific caseload recommendation.

**Experience, abilities, and skills of staff to use model.** The Human Services Coaching Framework can be adapted to work with any agency's current staffing configuration. Pre-requisites for coaching are not defined. Before and after a training, Public Consulting Group administers a proprietary Coaching Mindset Survey to assess the attitudes of the participating case managers and the impact of the training.

**Recommended frequency of interaction between staff and participant.** Coaches should meet regularly with participants. Public Consulting Group recommends that meeting frequency and duration be determined at the local level and based on agency needs. If desired, Public Consulting Group will work with the agency to set standards. Coaches are trained to tailor coaching approach to participants' needs. Public Consulting Group provides guidance on virtual coaching as a way to increase participant interactions.

**Staff training and support.** Staff receive 12 hours of training, delivered over two days (ideally spaced two to four weeks apart). The Human Services Coaching Framework training curriculum teaches core skills through one-on-one and small-group skills practice. The maximum training group size is 25 individuals. Ongoing training on coaching circles and peer learning is also available. Monthly coaching tips and customizable tools are provided to case managers

and supervisors, based on agency needs. The cost of initial training and ongoing support varies and is flexible to meet the agency's needs.

**Supervision training and resources.** Public Consulting Group develops customized training programs for each agency, but strongly recommends that all supervisors and agency leaders receive coaching curriculum training before coaches. A parallel supervisor curriculum uses case studies and examples relevant to supervisors. Public Consulting Group also offers implementation supports to meet agency needs.

**Intended outcomes.** Intended outcomes include increased goal achievement and employment. The framework helps agencies use existing data and

measures to measure outcomes instead of introducing new measures. Suggested measures include employment, engagement in TANF activities, educational progress, income, participant satisfaction, and staff attitudes about coaching. Public Consulting Group provides guidance to TANF agencies to update monitoring and reporting tools.

**Rigorous evaluation of effectiveness.** None

**Tools and resources in development.** A 14-module virtual training is in development.

**Point of contact for coaching model.** Deborah Joffe, Associate Manager, at [djoffe@pccgus.com](mailto:djoffe@pccgus.com) or (617) 426-2026.

## MyGoals for Employment Success

**Designer/developer.** MDRC worked with Dr. Richard Guare, a clinical neuropsychologist specializing in executive skills development.

**Funder.** Laura and John Arnold Foundation, with additional funding from the Kresge Foundation, JBP Foundation, Houston Endowment, and Weinberg Foundation

**Year of initial implementation.** 2017

**Approach to model design and initial implementation.** The model builds on lessons from evaluations of related programs, including the Family Self-Sufficiency program under the U.S. Department of Housing and Urban Development and the New York City Work Rewards Demonstration, and from a growing body of cognitive behavioral research that informs its step-by-step approach to coaching.

**Population(s) and sites with which model has been implemented.** MyGoals is operating in two public housing agencies (in Baltimore, Maryland, and Houston, Texas) for recipients of Section 8 housing vouchers and public housing residents. However, the suitability of the model is not limited to people with housing subsidies. Most coaching participants also receive Supplemental Nutrition Assistance Program benefits and some are TANF recipients.

**Site readiness assessment and preparation.** The housing agencies using the model had to commit to allowing participants to remain in the program for three years (even if the person's housing assistance ended), and for coaches to be dedicated exclusively to the MyGoals program.

**Alignment with TANF federal work requirements.** The model has not been implemented in a TANF setting, but elements of the model can be adapted to TANF program environments. Some MyGoals participants are likely to be subject to TANF work requirements independently of MyGoals.

**Coaching framework and process.** The coaching framework emphasizes an understanding by coaches and their participants of the participants' executive functioning skills and the implications of those skills for goal achievement. It encompasses goal setting in four domains and is designed for three-year participation. Coaches are trained to lead participants through a non-directive coaching process with the coach acting as a resource to participants, who must identify their own goals. Coaches lead participants through specific stages of setting more immediate goals (SMART goals), more challenging milestone goals, and, eventually, longer-term goals, across domains, in accordance with participants' wishes.

**Coaching resources and tools.** The manual includes coaching techniques and steps developed by experts. Procedures, forms, and database development require customization to fit individual program needs.

**Recommended caseload size.** The optimal caseload size is 50.

**Experience, abilities, and skills of staff to use model.** Coaches and supervisors should have workforce development backgrounds. Coaches should understand local labor market and local career management infrastructure and should be resourceful in all domains of the model.

**Recommended frequency of interaction between staff and participant.** Face-to-face meetings should occur at least monthly, with check-in contact (by telephone, email, text, or in person) in between. Participants receive a \$30 stipend each month for attending the monthly meeting to review goals and progress.

**Staff training and support.** Coaches must participate in online motivational interviewing training before they are trained in coaching. Training areas include marketing and outreach, model implementation strategies, executive skills coaching, financial management, and the use of labor market information. Coaching training lasts two to three days and

uses lecture, role playing, and small-group activities with a group of up to 12 people. The coaching costs \$8,500 per participant for the full three years of implementation, including the costs of incentives. Initial trainings are followed by regular check-in meetings between program staff and MDRC staff. Additional targeted and comprehensive booster trainings are available by webinar. Costs for training are not currently available.

**Supervision training and resources.** Supervisors and coaches are trained together. Technical Assistance staff from MDRC provide tailored support to supervisors.

**Intended outcomes.** Outcomes include labor market success, education and training participation and attainment, poverty and material hardship reduction, economic security, and personal and family well-being.

**Rigorous evaluation of effectiveness.** Programs using MyGoals are currently participating in the Evaluation of Employment Coaching for TANF and Related Populations, a federally funded randomized controlled trial of coaching interventions. Results are expected by 2021.

**Tools and resources in development.** There is continuous development of coaching guidance documents. Examples include tips on using social media, behaviorally informed participant engagement strategies, and reference cards on executive functioning skills.

**Point of contact for coaching model.**

Donna Wharton-Fields, Senior Operations Associate, MyGoals Project Manager, (212)340-8637, [donna.wharton-fields@mdrc.org](mailto:donna.wharton-fields@mdrc.org).

## Mobility Mentoring®

**Designer/developer.** EMPath

**Funder.** Multiple funders

**Year of initial implementation.** 2009

**Approach to model design and initial implementation.** Mobility Mentoring® was piloted in the Career Family Opportunity program and refined with feedback from staff and program participants. Continued refinement has been informed by feedback from staff, program participants, a learning network, and emerging research. Adaptation of the model is encouraged and supported through learning community and EMPath technical assistance.

**Population(s) and sites with which model has been implemented.** The model was designed to be applied or adapted to any human services setting. It has been used with the Massachusetts Department of Transitional Assistance and the Washington D.C. Department of Human Services. It has also been used with TANF recipients in other settings.

**Site readiness assessment and preparation.** EMPath staff conduct an organizational assessment to determine site and model fit.

**Alignment with TANF federal work requirements.** The model requires a transition from a compliance culture to a participant-centered approach. TANF programs may need to make adjustments to reduce large caseload sizes.

**Coaching framework and process.** The model is informed by executive functioning and is designed to encourage positive change on the five pillars of Bridge to Self-Sufficiency® tool. The framework includes an individualized coaching model and tools that can be adapted with support from EMPath.

**Coaching resources and tools.** A Goal Action tool is used to track SMART (specific, measurable, achievable, relevant, time-bound) goals and individual action steps. The Bridge to Self-Sufficiency® tool is

used for self-assessments and coaching discussions that strengthen executive functioning skills. The Bridge to Self-Sufficiency® tool is used to track progress toward self-sufficiency. Agencies have access to other tools and tip sheets on a member portal.

**Recommended caseload size.** The optimal caseload size is 40 or less, but it can be higher if coaches have strong organizational support.

**Experience, abilities, and skills of staff to use model.** The model can be adapted to an agency's current staffing configuration. Supervisors must carry a caseload to "lead by example."

**Recommended frequency of interaction between staff and participant.** Coaches should have 12 hours of in-person contact per year with each participant, with additional group, in-person, and virtual contact. Recommended participation for participants is more than a year. High-need and less stable participants should have a tailored approach based on need that involve frequent meetings.

**Staff training and support.** Training occurs in person and can accommodate 10 to more than 100 staff. Training is customized for coaches' experience and competence. Advanced coaching training is also available. Coaches can access monthly webinars and an online portal with resources; the online portal also has a question-and-answer module for coaches. EMPath technical assistance staff meet one-on-one with supervisors weekly, develop a tailored supervision curriculum, and have monthly conversations with supervisors about the efficacy of supervision. Two to three months after staff training, EMPath staff follow up regarding implementation successes and challenges to provide targeted technical assistance. Technical assistance costs vary.

**Initial supervisor training approach.** Additional training is available for supervisors, managers, and research staff. Eligible program leaders can apply to participate in a train-the-trainer model to train their staff.



**Intended outcomes.** Intended outcomes include improvements along the five Bridge to Self-Sufficiency® pillars, including changes in earned income, public benefits, education and training enrollment/completion, debt, savings, credit score, executive function, and family stability.

**Rigorous evaluation of effectiveness.** The Washington State Department of Early Learning conducted a quasi-experimental evaluation of Mobility Mentoring® in an early learning setting, but it has not been tested in the TANF setting using random assignment.

**Tools and resources in development.** EMPATH is piloting an Intergen Mobility Mentoring® program and tool and will be launching a Learning Management System (LMS) to more effectively and efficiently scale a variety of trainings, technical assistance, and support to global learning member organizations implementing a Mobility Mentoring® informed model.

**Point of contact for coaching model.** Jennifer Lowe, Vice President of Shared Learning and Member Networks, at (617) 259-2944 or [jlowe@empathways.org](mailto:jlowe@empathways.org)



Follow us on    

Princeton, NJ / Ann Arbor, MI / Cambridge, MA / Chicago, IL / Oakland, CA / Seattle, WA / Tucson, AZ / Washington, DC / Woodlawn, MD

EDI: High Wycombe, UK / Bukoba, Tanzania / Dar es Salaam, Tanzania