Integrating Innovative Employment & Economic Stability Strategies (IIEESS) Webinar Transcript

Peer-To-Peer Learning Opportunity: Goal Setting – Forming a Game Plan

Date: February 14, 2019

TINA SMITH: Hello, everyone. Welcome to today's webinar. Goal Setting: Forming a Game Plan. My name is Tina Smith, and I will be the moderator for today's webinar. Before we get started, I want to review a couple of housekeeping items with you, and explain how you can participate in today's webinar. When you joined today's call, you may have noticed that you have been placed in Listen Only mode. If you have questions that you will like a presenter to address, please submit them in the Q&A box located on the right hand side of your WebEx window. When you logged into the webinar today, your screen should have look like the area on the top right of my slides. In the middle of the screen, you should see a section where you can chat or submit questions. Even though both sections are available to you, please submit all of your questions using the Q&A box only. You also have the ability to change the view on your screen. To change your view, please select the full screen icon button located on the top right hand corner, the same window as the presentation. You can see the arrow pointing on my slides to exit full screen mode. Hover your mouse over the full screen icon button, and again to adjust your view. Today's webinar, we will be using the Raise Your Hand interactive feature. During the Q&A portion at the end of the webinar, you will have the opportunity to verbally ask questions or comments using this option. When you're ready to speak, please select a small hand icon located in the bottom of your participant's box on the right side of the screen. You will then be called on and unmuted to engage in the webinar. Please note that today's webinar will be recorded. If you experience any difficulties during the webinar, please call the WebEx customer service number at 866-229-3239, Option Three.

Today's webinar will be presented by Dr. Samantha Wulfsohn and Caitlin Smith. Caitlin Smith serves as the Director of Housing Redevelopment and Mobility Mentoring Services for EMPath. She has years of experience in housing-based programming for low income families with a demonstrated history in developing strategic partnerships through collaborative planning and implementation. Our first presenter today, Dr. Samantha Wulfsohn, is a licensed clinical psychologist currently working for MDRC. Her work there focuses on providing technical assistance to the TANF education, early childhood, and fatherhood systems, implementing new programs as part of evaluation research for the purpose of program improvement. Prior to working at MDRC, she spent over 15 years providing coaching and leadership to home, visiting, and early childhood education programs. At this time, I would like for Dr. Wulfsohn to take over the presentation and start the webinar. Dr. Wulfsohn?

SAMANTHA WULFSOHN: Hi, everyone. Welcome. We're very excited to have you for this next webinar and I am going to get us started in a bit. A little fun activity, assuming I can figure out how to move the slides down, which I know from… there we go. And just to do a quick check-in of who is on the call and have a chance for everybody to connect with each other. So like we did in the last webinar, we can use the technology of using

our virtual voices as a way to connect, and I know we had several folks come together as a group. So some of you who are on the webinar hopefully have had a chance to make face-to-face contact, at least see what some of the virtual voices look like behind that hidden screen.

So what we wanted to do is we want to go through state alphabetically, and so we get to be first, and flip it around. And so, I'm going to ask, as I go through the list of each state, if you can share your name and you could type it into the Q&A box on the right. You'll see it, as Miss Tina had pointed out to you. So type your name and also if you could just share what you're coaching. I'm going to ask you to choose: If you were to coach or observe a sport, which one would you rather go for? Would it be football or basketball, and we'll see… whether we like throwing the ball at each other or knocking each other over or passing the ball in front of the basket. Why don't each of you type in your name in the Q&A box whoever is present, and we'll be looking to see who is joining us. Oh and I appreciate— so Brittny can hardly hear me, so I'm going to switch my contact through a different system. So welcome, Wendy from New Hampshire, and Jennifer Heimericks from Missouri, and she would coach hockey. Great. Deborah Keeton from… this is moving so fast. Carlette West…. Rhonda from Oklahoma, basketball. Sammye and Flynn from Oklahoma. Kathleen Bender from Selma, Alabama. Fannie and Karen, Carenda Woolridge. Well, she would go with basketball. If I missed anyone because I'm only seeing one screen... Caitlin, you can share out too; that would be great. Welcome, Laurie from New Hampshire, basketball. Sammye, Oklahoma, basketball. Brittny, West Virginia, basketball. Looks like basketball is a popular one. JaCinda Rainey, basketball. Fannie and Karen, basketball. Wonderful.

Okay, well, we have 29 people that haven't shared your name. Welcome, anyway. We're very excited to have you here, and what I want to do now is just move on to what we're going to be covering in today's webinar, and then I'm going to pass you on to Caitlin, who is going to move us through the content. Somebody is sharing that they understand what basketball is about and the sound seems to be breaking up. Okay, I'm going to pass the ball to Caitlin, 'cause it seems like my sound isn't working great, and have her introduce the goal of the session.

CAITLIN SMITH: Hi, everybody, and I'm so excited to see so many people have joined the session today. We have 54 attendees in this webinar today, so I'm really excited. Thank you all for joining and taking time out of your days to talk about goal setting with us. The purpose of this webinar today is to reflect on goal setting in our own lives, and how we might apply similar strategies to goal setting with customers, and to examine best practices for supporting our customers in goal setting and goal achievement. I hope you all had an opportunity to look at a couple of questions that we sent out to you ahead of time. They were just two questions to think about. If you didn't have a chance to look at them before the webinar, that's okay. But if you did and you had a chance to answer them, we'll get to those in just a minute here.

So before we get really deep into talking about goal settings, the first thing I like to do whenever I'm presenting on goal setting is to just have the folks I'm talking to sit back, even close your eyes for a minute. I know it's after lunch, so don't fall asleep. And just take a second to think about these questions that I'm going to ask you. You don't need to answer them right now; just think about them in your minds. So think about a time when you set—it can be recent or in the past—when you set a personal or professional-related goal. Any goal, but for your own self. So how did you first feel about that goal? Were you nervous? Were you excited? Were you maybe a little bit hesitant or just ready to hit the ground running and accomplish that goal? How long had you thought about it before you took action? Did you share your goal with others? Did you have people in your life who were supportive or discouraging? Did you map out the steps that you needed to complete to achieve your goal? Did you come across roadblocks along the way? Did you get stuck? Did they derail you? Did you recalibrate? How did you recover? Did you recover? What did that feel like? Will you try again? Were you successful at your goal? How did that feel? Did you celebrate with others? How did you celebrate? And did you learn any lessons about yourself or the process that you've applied to other aspects of your life?

We like to do this exercise before jumping into the discussion about goal setting just to remind ourselves what it's like to set goals in our own lives and how there is a process, and what the steps were like, and how it can be quite complicated. So I would love to ask if there are any brave souls who would like to share the goals that they set. You don't have to get into deep specifics or anything, but if you'd like to share the goal you set and

maybe a little bit about that process, that's why we sent the questions ahead of time. But even if you didn't answer them ahead of time and you've got a minute to think about it, if you'd be willing to share your goal, I'd love for you to just type it into the Q&A box, and I'll read them out loud.

"Completing certified public manager program." That's a great goal. I'm sure that took some time and some real steps and planning ahead, support from family or friends or co-workers, probably. Is there anything you'd like to add to that, Wendy? Oh, Karen's goal was seeking a promotion to state office. Thank you for sharing that, Karen. So my screen gets cut off. Sam or Tina, are you able to see the whole goals here and read them?

TINA: Okay, I read here: "Attempt to clean closet. Have supportive family but when placing items in piles to keep, donate, or toss, ended up giving up because seemed to be overwhelming." I have one from Ashley, Fannie. "Karen's goal was seeking a promotion to state office."

CAITLIN: There's one that just popped up, but I can't see the whole goal.

TINA: Is that the one from Wendy?

CAITLIN: Yeah, I don't know.

TINA: "It took a long journey of starts and stops based on work needs, but I just kept plugging along to the finish line." And that was from Wendy LeClair.

CAITLIN: That's great. Yeah, thank you, Wendy, for sharing that. That's exactly… I imagine that it did take some time, and just keeping that in perspective when we think about setting goals and supporting our customers as they are achieving those goals. Helpful to reflect on our own goal setting and goal achievement process. I see another note here: "Several goals. One being getting a promotion, second being to improve health. For big goals, I set a five-year plan." That's from Deborah. That's great, so that five-year plan is really long-term planning, probably goal setting within that, reaching the longer term goals as you go along. "The goal is to finish my master's degree." That sounds like a current goal. Good luck with that. I hope it's going well. I see Deborah says it's correct. Great. Well, thank you all for engaging and thinking about your goal setting. We're going to move on to the next slide now, but there's another opportunity to share your experiences in a few slides here, okay?

So, as we all know, the tag line for this IIEESS project has been "Coaching for Success," right? And so before we even get into goal setting with our customers, we have to talk about… we need to have a strong foundation to have a coaching approach and a coaching relationship with our customers. And the first step to a good coaching relationship is to build trusting relationships with our customers. It's pretty well understood that we need to have trusting relationships in order for our customers to want to work with us and to set meaningful goals. But let's just spell that out a little bit. How do we build those trusting relationships? We do that by helping our customers/participants develop the capacity to aspire, and we try to understand their intrinsic and extrinsic forms of motivation that will help them keep going as things get tough, and we support them in maintaining their momentum when they start to build some momentum. We support them in keeping that momentum going, and through those three aspects of developing the capacity to aspire, understanding their motivations and reflecting those back to them, and how they maintain momentum on their goals, we're able to build that trusting relationship and continue it as time goes on.

But how do we develop the capacity to aspire in our customers and in our participants? We can do that through a number of ways. Some coaches use visioning boards, some use a visual meditation, help people think about their future, asking questions like where do you see yourself and your family in three years, five years? What would you like your children's lives to be like when they grow up? How can you move toward that now? When you were a kid, what did you think you'd be when you grew up? What's one thing, if you could change one thing about your life today, what might it be? Now asking different kinds of questions that help our customers develop the capacity to aspire. And then as we develop our relationship with them, also understanding what their intrinsic and extrinsic forms of motivation are. So in the beginning of the relationship, especially with our customers on receiving TANF benefits, an extrinsic form of motivation may be to access their benefits or to

avoid sanctions. And over time, as we get to know them better, we'll start to understand more of what their intrinsic forms of motivation are. Like their belief in themselves, their desire to have a better life with their families… things like that will help us understand what their intrinsic forms of motivation are. And as we do that and we build a deeper trusting relationship, then we can set more meaningful goals that will have effective outcomes.

All right, so the next step in the coaching approach is self-assessment, which leads directly into goal setting. The questions that we want to ask ourselves is: Where do I see myself today, and where do I want to go? What's in the future for me? Where am I headed? And going back to the goals that you all thought of in a previous life, think about how you engaged in some form of self-assessment. Now it may not have been a formalized self-assessment, right? But there was some kind of self-assessment that you probably did that led to you setting a goal. So if it was a fitness goal or what the end goal is sometimes relating to your health, you may have done some self-assessment where you felt like you needed to improve your health, so then you set a goal to do so. Or maybe it was an employment-related goal or an education and training-related goal, and you sat down and you thought about your earnings, your current earnings, and your current life expenses, or future goals, maybe to buy a home or move out of your parent's house or whatever. You thought about your earnings and your expenses. You did some self-assessment and you said, I need to increase my education to get a better job or I need to increase my earnings so that I can do these other things that I want to do with my life. Well, where do I see myself now and where do I want to go? What kind of self-assessment did you all engage in when you set the goals that you put out before? It doesn't need to be the same folks who volunteered their goals earlier. Some of the other folks, just let me know what self-assessment did you engage in, if you're willing to share?

So one person, Deborah, wrote: "For big goals, I set a five year plan." Right, you shared that earlier, or maybe I skipped back. Yes, I skipped back, sorry about that. "Retirement goals." So, right. So thinking about where you want to go in terms of how long do I want to work? What do I want my life to be like when I retire? Retirement goals related to retirement savings accounts, maybe. Maybe goals related to what am I going to do in my retirement? How do I want to best use my time? How will I feel like I'm really enjoying my time in retirement? Do you want to expand on that, Kathleen, or do you feel like I got the gist of it? "Yes."

"Applying for new position, assessment, reviewing skills and experience as it applies to potential new position." This is from Angie in South Dakota. Thank you for sharing that, Angie. So you were wanting to set a goal around increasing your skills and your experience for a new position. So you assessed what you had now and what kind of skills that you wanted to develop. That's awesome. Just give one more minute for folks, anybody else who wants to share. The reason that I really wanted to bring up the self-assess…

SAMANTHA: Caitlin, this is Sam. I'm going to also offer up… I know that I was trying to send something and it is not coming through. So I just wanted to offer up if people are trying to share on the chat box, Q&A chat box, and it's not going through, if they want to try the option of raising their hand and sharing their voice, we should offer that up, just in case they're not able to get through on the Q&A box.

CAITLIN: Absolutely, thank you for that, Sam. Oh, it looks like I'm on mute. Am I on mute?

TINA: No, ma'am, we can hear you.

CAITLIN: Okay. So we'll give another minute for anyone who wants to do the Raise Your Hand button and speak your response. Then I'll need Tina or somebody to manage that raise the hand thing. Charlie from West Virginia says, "Keeping healthy to be able to enjoy retirement." Yep, a couple people thinking about retirement here, huh? All right, I think it's really important to talk about self-assessment when we're thinking about goal setting because if we think about our own lives and our own goals that we've set, and where we've been successful and maybe where we've haven't been as successful, we might see, we might self-reflect and realize that our most successful goals have been based on our own self-assessment, something that we saw in ourselves and somewhere that we wanted to go, and we made a real, concerted effort to get there as opposed to somebody else imposing a goal on us. So if my parents wanted me to do something when I grew up, and it wasn't really what I wanted to do, I probably didn't go that way. That's a common scenario that a lot of us may

have experienced in our lives. But thinking about what is our own self-assessment and where do we want to go, and it starts with that self-assessment for the really robust goal setting that is going to be more effective.

Okay, so what kind of self-assessment might we make available for our customers? This is one self-assessment tool that you can use if you want to. I offered it up in South Dakota and I believe Alabama is considering using it there. There are other self-assessment tools out there in the world. This is just one option that I'm offering y'all. So this is called the goal setting decision-making wheel. And the idea here is that it's just a helpful conversation tool to help your customers assess where they see themselves in various areas of their lives. And so I populated the wheel with some common areas that our customers are addressing when they're working with us, like childcare, transportation, education, job readiness, banking, savings, debt, housing, of course, and social networks. These are just a few areas. And what's cool about this goal setting decision-making wheel is that you can change them up. You can write whatever you want for those eight areas. It could be student loans. It could be food assistance. It could be whatever feels appropriate to you and the customers that you're working with at the particular points in their lives. And so what you do with this is you say, you help… you show the customers this whole wheel with all these areas of their lives, and talk about how we need all these areas to be balanced if we want this wheel to roll down the road in a straight line.

So here is an example of wheel that's not so balanced. So how bumpy is your ride? What is this really feeling like for you? And then thinking about this, what are some goals that you might want to set? Before we get into the goal setting with that, I just want to talk through how you might engage in a conversation around this self-assessment tool. So let's say you're working with somebody who… and you say, "Here's this wheel. What area would you like to start with? What appeals to you right now? Where do you want to start?" Because the other cool part about the wheel is that there is no hierarchal order of these different areas. They're all important in our lives, so you can choose where you want to start as the customer.

So let's say you're working on a customer who says they want to start with child care, and on this wheel, she's assessed herself a little bit high up here. Let's say that you're working with a customer who wants to talk about child care. And so you start by saying something to the effect of "How confident are you in the child care that you have in place for your children? So on a scale of zero to ten. Zero being you have no child care in place, you can't do anything because you're always with your kid and so you're not able to go to school, go to work, engage in other life goals that you want to accomplish, right? Child care is like you have no child care. Ten being you have great child care in place, you really trust your child care providers, your child loves them, completely affordable. You have back-up child care if anything comes up. You're totally set with child care. There is no issue with child care and your ability to engage in your other goals in your life, right? So where do you see yourself?" So imagine your customers says, "Well, I guess I'm at a three." So then you can use your motivational interviewing skills to tease that out a bit. Understand what does it mean that you're at a three? What would a five look like to you? What are some things that you could maybe put in place that would make your relationship with your child care feel more like a five or an eight. Or what would it look like for you, if your confidence level was a 10? And sort of asking more of these questions, understanding more of what's going on with their child care situation, and through that conversation you'll hear some things that maybe your customer would want to set goals around. And you can do this with all areas of this wheel.

All right. So now, of course, what comes next? Once you've started to identify some goals from the self-assessment with your participant. Helping them think about what goals they could potentially set to achieve. How are we going to do that? How are we going to get from Point A, self-assessment, to Point B, goal achievement? Well, we think of goal setting as like a GPS. So I need to get from Point A in Boston to Point B, somewhere else where I'm going. Whenever I get in the car to go somewhere, I plug in the address into my GPS and it gives me the steps I need to take, the turns, left, right, straight, how long, how far I need to go to get where I'm headed. And if I make a wrong turn or I run into a road block, or there's construction or a detour along the way, my GPS helps me. It recalibrates and it helps me get back on track. That's the role of the coach, right? As our customers are hitting road blocks along the way towards achieving their goals, we're there to support them and recalibrating, getting back on track to achieving their goals without making them feel like a

failure for hitting road blocks along the way. Those are perfectly normal. We've all experienced it, right? So… well, here we are. We see our car coming off the map here 'cause we got to Point B.

All right, so here is the goal setting tool that the TANF offices of South Dakota are putting in place. It's being piloted in the Pine Ridge region, South Dakota Region Two. And they really developed this tool, so I'm going to talk it through a little bit, but I know, Angie and Keith, you're both on the webinar here and if you would like to chime in and add to anything I say about your tool, I'd really appreciate it. But I know I didn't really give you much of a heads-up, so it's okay if you don't feel up for it.

So on the front page of this tool, this Road Map to Success goal setting tool, you'll see at the top, on the top right-hand corner, they have this My Starting Point. So that's coming out of that self-assessment. Where do I see myself now? What is my starting point? And then there are Growth Goals, and so with their customers they can set Growth Goals #1, #2, #3, and a longer term goal. This is just one way of looking at it. You don't have to have three goals set with a customer at any particular time. It could just be one goal, maybe two, maybe three, with a longer term goal. Again, that longer term goal is more of a visionary goal. But then in the top left-hand corner, you see this big box: My Motivation for Success. So why are we setting these goals? What motivates the customer to achieve these goals for their longer term goal? And then in the bottom right hand corner, we have the signatures of the person, so the coach supporting the customer and the customer's signature and the date. And then the second page, the back side of this goal setting tool is a place to put out the action steps for each individual goal. So if there are two or three goals set, there will be a few extra pages with this goal setting tool. But if there is only one goal, then on the back we'll rewrite the goal in this top box, and then set the action steps that bring that goal to life. Angie or Keith, if you'd like to add something, you can raise your hand and we'll unmute you and give you an opportunity to flesh this out a little bit.

SAMANTHA: We can also help facilitate connections, so if any of you have questions after this webinar, we can make sure that we can connect you to those folks who have started using this and developing.

TINA: Hi, Keith, you are unmuted. We can all hear you, sir.

KEITH: Hi. We were real excited with the help of Caitlin when we were working on developing this goal tool. We really were excited not only to have this. We liked the visual effects. We felt there's a certain component of that just as with eating and anything else that give… that puts it in perspective that it's a journey. And so helping also to visually signify that it's not an instantaneous process, the goal. We've got the long-term goal but we've also acknowledging that we've all got short-term stuff as well.

CAITLIN: That's so great, Keith. Thank you for sharing that. I forgot to mention the road aspects of this goal setting tool, which is… you talked about that perfectly, that it's really a great visual for coaches and for customers to support customers and thinking about this being a journey. Thank you for sharing that.

KEITH: And I'm not sure if Angie's able to get on or not. She's trying to access from an itinerary site, so I don't know what additional technology she's got working there other than this, so she may be able to… I'm not sure.

CAITLIN: Great. Well, if folks do have questions and you want to connect with the folks in South Dakota, they're really piloting this tool right now and it's very cool, and we'll see where that goes.

Okay, so. As we all know, we've all heard about SMART goals, right? Just to remind ourselves, what does the SMART stand for? Specific, measurable, attainable, relevant and time-bound. I always like to call out the R for relevant. What does that really mean? Generally when we're talking about SMART goals in our programs, we would like those goals to be relevant to our programmatic outcomes, right? So any goal we want to set may be relevant to our own personal desires or what have you, but we want these goals to be relevant to our programmatic outcomes. And so, we are going to do a little SMART or Not exercise here, and we're going to do some poll questions. Tina is going to set up some polls for us, and you can just click your answer on the poll. So the first one is: Imagine that I'm working with a customer named Carlos, and his goal is to get a job. Is this a SMART goal?

TINA: I'm going to give you guys about 10 more seconds and then I'll close the poll, okay? So we can all review the results.

CAITLIN: All right, so we had 10 out of 50 people. Some people said yes, some people said no. A bunch of people didn't have a chance to answer. Maybe calling in and weren't able to click. Let us know if you're having any trouble actually doing the polls 'cause there may be some technical glitches as well. So in thinking about this goal to get a job. We want to get back to the SMART flags. So how specific is that goal? Are we talking about a full-time job, part-time job, seasonal, temporary, or do we have a goal around how much money we want to make in this job? How specific is it really? Is it measurable? It's probably measurable. We'll probably know if Carlos got a job because he will get paid, and maybe he'll be able to show us a pay stub, so it's probably measurable. It is probably attainable in the sense that he might be able to get a job, but again, we haven't been that specific about what kind of job or how many hours he wants to work or what kind of pay he wants to receive. So we're not sure how attainable it is, what kind of job it is, and if he has the education he needs to get that job. It's probably relevant. Getting a job is pretty relevant to the TANF's programmatic goals. In terms of it being time-bound, we didn't put a deadline on it, so it doesn't seem very time-bound. So in this sense, this goal to get a job is not a super SMART goal. We would need to make it SMARTer by adding some specificity and a timeline that would be the most helpful, and also through that specificity, we may be able to tell if it's attainable.

All right, so the next poll question is: Imagine that I'm working with a customer named Elena, and her goal is to secure child care by March 31st. Tina is going to open the poll and we'll say if you think it's a SMART goal or not. Secure child care by March 31st.

TINA: I'm going to give a few more seconds and then I will close the poll to review the results.

CAITLIN: All right, so thank you, Tina. So we have most of the folks who responded said yes, this is a SMART goal. Three people said no, not a SMART goal, and a bunch of people weren't able to answer, which I understand. So let's go back to that SMART slide again. All right, so the goal here was to secure child care by March 31st, so it's a little bit more specific. We want to get child care and we have a deadline for it, which takes care of the T for time-bound, so that's cool. But in terms of specificity, maybe we can make it more specific. I mean, securing what kind of child care? How many hours of week do we need this child care? And at the same time, depending on our relationship with the customer, this may be a SMART enough goal because we really know what kind of child care they're needing. But it could really go either way how specific we want to be with this goal. I think I would err on the side of being more specific earlier in the relationship, so that we can set the ground. We can lay the ground for really good goal setting and engagement with our customers. So we definitely can make it more specific in terms of are we just needing child care for a few hours in the afternoon? Is this a school-age child who just need afterschool care? Are we needing child care full time because this is a younger child who is not in public school yet? So yeah, what kind of child care, and how much can we afford for child care? So maybe there are ways we can make it more specific. It is probably measurable. Once they secure child care, they'll be able to bring in some documentation showing us that. It's probably attainable depending on their financial resources or if they have a child care voucher that they can use or if there's child care providers in the area, but there are some things that come into play in terms of its ability to be an attainable goal. It's definitely relevant to the TANF's programmatic goals of getting employment. You usually need child care if you have kids in order to sustain employment, and it is time-bound because we have that March 31st deadline, so that's great. Thank you all for engaging in that.

All right, so the next one is not going to be a poll question. I'm going to ask you all, if you're able, to type in the Q&A box your response. So imagine I'm working with a customer named Claudia and her goal is to find housing. How can we make this goal SMARTer? What are some ways that you can make it more specific, measurable, attainable, relevant, and time-bound? And I'll give a few minutes for folks to type in their answers. "In what area? What area do you want to live in? Are you looking for a two- or a three-bedroom apartment?" Really good question. So maybe we need to find housing that consists of a three-bedroom apartment in the neighboring town of X, right? That could make it more specific.

SAMANTHA: Caitlin, I can see some more responses from—

CAITLIN: Oh yeah. "What type of housing?" I had scrolled.

SAMANTHA: There you go.

CAITLIN: "Not SMART… Do you have pets? Do we need to find housing that accommodates pets? What's the timeframe to find a home?" Having a deadline for that time-bound aspect. "What's the price range, location, how long do we have? What options does the housing need, such as how many rooms? What areas does she want to reside? To locate an apartment that accepts my housing choice voucher? Does Claudia want to buy or rent? Do you need a home that is on the bus route?" So maybe we make it more specific in that sense by saying, "Define housing on the 36 bus route for rent under $1500 a month," you know, whatever. We can make it far more specific, right? "I would work with her to identify the type of housing. Where? What price range? What size needs? When she wanted to have it secured by? When do you need to move in by? What type of housing? Public? Where? Home? How much rent is Claudia able to afford? What's her budget? Timeline? What size, timeline, price range…" Those are great, so you've all got... It seems like you've really internalized the need for specificity to make it more measurable and attainable, right? And thinking about what is her budget— does she have a Section Eight voucher? Is she looking for some kind of other subsidy? Is she able to find housing without a subsidy? Do we have money for deposits? First-class security deposits, things like that. How is that going to affect our ability to get housing?

SAMANTHA: I looked at—

CAITLIN: Here's one— go ahead, Sam.

SAMANTHA: I was going to say— I also noticed what's really wonderful about all these examples that everybody is sharing is that there are many open-ended questions, which is such a key component of coaching. And how this is an example of how you're doing a beautiful job of leading goal setting with just open-ended questions, which is an important part of coaching.

CAITLIN: Yes, thank you for pointing that out, Sam. That's exactly right. All right, I see one here: "What is your income and other bills?" So thinking about the budget and how the budget will be affected by a new rent. That's great. Thank you all for engaging in this.

All right, so, and then continuing to think about our goal setting and the process for supporting our customers as they're working on their goals, I have this image here that's to show you just the goal setting process, and just to keep these things in mind. So we begin the goal setting process with that self-assessment that we talked about earlier, and through that self-assessment as coaches, we want to tune in and really hear what our customers are aspiring to achieve. What are some of the priorities that they've put in front of us? They may or may not align with what we think their priorities should be, but the goal setting will be far more effective if they are coming from their own priorities and their own self-assessment. So we assess, we tune in, we help them identify and prioritize their goals and refine their action steps. We identify supports and challenges. This is a really helpful thing to do in the beginning of the goal setting process. What kinds of supports do you have in place to achieve this goal, and what might get in the way? What are some things that could pose as challenges to goal achievement, and how can we address those challenges if they come up? So thinking about those things from the beginning helps that customer be more likely to achieve that goal. So if we think about our own lives, if I set a goal around weight loss or nutrition and I say, "I don't want to eat any more bagels for a month, right? Well, what am I going to do on those days where I'm just really down and I really truly want a bagel and I'm right next to the Bruegger's bagel shop? And I could go right in and get that bagel, and then not achieve my goal. What's something I can put in place? How can I support myself in not buying that bagel that day? So thinking about challenges that could come up with any kind of goal achievement, and talking through with the customer and asking them, "What do you think you could do? What's one strategy you could put in place if this challenge comes up for you?"

And then working on their goals, so we want to have some accountability, some kind of follow-up with our customers so that we can support them, especially if they're setting longer term goals. So in the beginning of the relationship, we want to try to set short-term, low-hanging fruit goals that could be accomplished in one or two weeks, or maybe only a few days, depending on how your orientation period is set up in your TANF office. If there's some really good short-term goals you can set and help your customers achieve so that you can build on that engagement and build momentum, that's great. And then as we're starting to set longer term goals, maybe three or four weeks, maybe one or two months, maybe six months, as they're starting these longer term goals, putting in place some accountability and some follow-up to support them while they're working on them, not just sending them out the door with a six-month goal, or even a two-month goal, and saying, "All right, I'll see you in two months when you've achieved this goal." Maybe asking them, "Would it be helpful if we checked in in a couple of weeks to see how this goal is going?"

And then there's a point here about reflection. So as the goals are achieved, or even as they're not achieved, putting some time into the coaching sessions to reflect back on what happened with that goal setting and goal achievement process. What does that feel like for the customer? What did you experience as the coach in supporting them along the way? What are some things you saw, some strengths you saw in the customer? How can you help build a positive identity in the customer to help them believe that they can continue to set and achieve more goals? So reflecting back on, "You did this, you set this goal to secure child care by March 31st, and you hit a few road blocks here and there. There weren't a lot of openings in the child care centers in our area, but you stuck with it, and you found this place, and you secured child care by April 15th. So maybe it didn't happen by March 31st, but you still achieved your goal. Congratulations! What are some other goals we can set going forward?" Or maybe they did achieve it by March 31st, and then it's even better. And so continuing to do this; this is an iterative process. We want to continue to be setting and achieving more and more complicated and longer term goal with our customers, and we're not necessarily doing these things in a particular order. We may be jumping back and forth. So at every point in this process, we're going to help our customers assess and tune in to what's going on, so especially while they're identifying their supports and challenges and working on their goals, we're going to continually be helping them to reflect and assess, do some self-assessment of "How is this going for me? What is this looking like? Where am I hitting road blocks? What kind of supports do I have in place that's making this possible? How can I leverage those supports to continue to achieve my goals?" So that image can be very helpful, and I also can send that if people would like. All right, so I'm going to hand the ball back over to Sam.

SAMANTHA: Okay, so I've adjusted my audio so I'm hoping that everybody can hear me now. I apologize for earlier. At least you got the important content. So we just want to hear a little bit from all of you, any of your main takeaways. And again, we will have you share in the Q&A box. And I think it would be helpful if we just give each state a turn, and then we will read out individually for each state to all of you, so you can hear what others are thinking and what one main piece of information was interesting to you that you think you'll take back to your work.

So I'm going to, instead of… I know we often go alphabetically and we always make Alabama go first. So I'm going to start at the end of the alphabet and begin with West Virginia. And I do remember, Charlie, you introduced yourself at the beginning, and if there's some others in the group, then that would be great. So anyone from West Virginia, if you can share one of your main takeaways from today's conversation, that would be great, and then I will share it out with the group. In the meantime, the rest of you have the advantage of thinking for a moment what your main takeaways are. Okay, I'm going to let South Dakota have a turn, and I'll give the West Virginia team a little bit of time to think through some more. So South Dakota, if there's one takeaway you'd would like to share with your colleagues that you got from today's webinar and that would be great if you could just type it in the Q&A box. We will be looking.

So Charlie from West Virginia is sharing that his main takeaway is the goal setting decision wheel. Thank you so much, Charlie. That's great to hear. Okay, so now while South Dakota is preparing to type in the Q&A box, I'm going to ask Oklahoma, anyone from Oklahoma. There's a lot of names there, and I have the advantage of knowing all of you. So if you could share up—and there we go, Oklahoma has shared already. Rhonda is

sharing that it's important to reflect back on results, even if the goal is achieved. Thanks, Rhonda. And Flynn is sharing that using SMART to help clients make their goals better and the goal wheel. Carenda is sharing that SMART goals is her takeaway. And Angie is remembering that this is a journey, and a journey will not always be a smooth journey. The decision wheel helps us visualize this. Angie, where are you? Could you remind us where you're from so I can tell the group? I apologize. I'm sorry. Rhonda and Flynn are from Oklahoma and Angie is from South Dakota.

Okay, and if anyone from New Jersey is on, if you could share any of your takeaways from today, and we'll have both the News contribute, New Hampshire and New Jersey, if you can share any of your main takeaways from today. From New Hampshire, Wendy is sharing, "I like the goal setting wheel, and it be interesting how to further analyze the information gained from completing the wheel with a client in terms of next steps and goal progression." And then Keith is sharing that "The reflection on what was involved in my own goal setting helps with keeping the perspective on the process involved with the customers from South Dakota." I bet Caitlin is doing the happy dance right now. I am, too, actually in part. Rhonda from Oklahoma is sharing, "I also really like the idea of the road map." Rhonda, we can talk more about that.

Okay, so I don't want to forget about Missouri and Alabama. You guys usually get thrown under the bus first, so we're going to bring you in next. Emma Fox: "I'd like to say that helping the participants get down to the details with the wheel visual is something that can be useful for people of all cognitive levels, and that the tool will be an asset in any program." And Emma, I'm not sure where you're from, but if you can share, I can tell everybody. From Missouri, JaCinda is sharing about SMART goals. Emma is from Missouri, and Fannie is sharing, "Goal setting is beginning with the setting of short-term, low goals that are easily accessible." If you can remind us where you're from, Fannie, that would be great. And then Laurie is sharing that goal setting allows for more clarity and even decision-making, and provides a measurable and tangible purpose. And Laurie, if you can also tell us where you're from, that would be great so that we can share with the rest of the group. Well, this is amazing. Thank you. It sounds like there are a lot of… Fannie's from Alabama, which I should have remembered, and Laurie's from New Hampshire. Great. Now I'm starting to… the faces are actually coming back to me 'cause I got to meet many of you, so that's great. All right, well, I think it sounds like there are a lot of things that people heard during the session and we're really excited that you were able to join us. So I'm going to pass the ball back to Caitlin. If you have any further questions or comments as we wind down, or I might need to have somebody… some person in the background did that for me, fabulous. It's all yours, Caitlin.

CAITLIN: Great, thank you, Sam, for reading all those out. And thank you so much, everybody, for engaging and really thinking about what are your takeaways from this webinar. I'm excited that the wheel is helpful and that reflecting on your own goal setting process has been helpful, thinking about that wheel and how to continue the conversation as folks set goals. Really, when we're using a coaching approach, we're really helping our customers set their own goals and continuing to move towards their own journey of whatever they think self-sufficiency looks like to them in relation to your TANF program. So you're always going to have your own programmatic goals. What are you trying to achieve with customers by the time they leave TANF? So I guess employment in such a way that they don't need TANF benefits anymore. And so how can we use that wheel to support coaching the customers toward that end goal of getting off TANF benefits because they're employed in such a sustainable way that they don't need TANF benefits anymore? You can continue to use that wheel, and you can just change up the different topics on the wheel. You can even ask them for different topics that they're thinking about in their lives that they want to talk about. Just change it up, use whatever you want as a method for helping them think about goals that they could set and achieve. So are there any questions or other comments that you all have for me right now?

SAMANTHA: I have one other comment I'd like to share. It was a bit of an Aha moment for me, and I feel like you're always learning when you attend things and participate in things. And it occurred to me that on the SMART goals front, the more specific you are with the goal, the easier it is to measure. So I think that's something that I realized that to make our jobs easier is that with all those wonderful open-ended questions

that people presented as ideas can help to become… lead you to a more specific goal and will make it more measurable and easier to measure. So I just wanted to share that.

CAITLIN: That's great. Thank you, Sam. Yes, that's true; the more specific you get, the more measurable it is because you've got to achieve all of that specificity. One caveat to that is the more specific you get, the harder it may be to achieve, actually, or it may not be as attainable. So, for example, I was having some conversations with some co-workers about a goal to obtain a job in a healthcare field. So that's by such and such a date. That's pretty specific, but here in Boston, we have a bunch of different hospitals. So we could make it more specific to obtain a job at Brigham and Women's Hospital, or obtain a job at Beth Israel Hospital. But then let's say we've set it for Brigham and Women's Hospital, and then the customer actually achieves the goal by obtaining a job at Mass General Hospital. Do we say they didn't achieve the original goal or do we update the original goal to include Mass General? So anyway, just thinking about how specific we want to get, what are the priorities with the goal? And so maybe the goal to obtain a job in the healthcare industry is specific enough. I don't mean to make it too complicated, but just thinking about all the factors. But it's true; the more specific it is, the more measurable it will be.

So I haven't seen any other questions pop up in the Q&A. I want to share with you all this tip sheet that we'll be sending out to everybody. Just goes over some of the key points from this webinar, and it will be downloadable. Tina, do you want to pop on and tell us about the downloadable nature of the tip sheet or if you're sending it out later?

TINA: Yes, I'm actually going to have the files attached today for everyone to download, but in the meantime, we are in the process of making it accessible for individuals with disabilities. So at that time, we will have it sent out for those who have disabilities and have issues with reading the tip sheet, and I want to say the worksheet that we'll have downloaded today. So we'll also have that available for those who have disabilities.

CAITLIN: And will the slides be shared, Tina?

TINA: Yes, they will be available for everyone to have for their own records.

CAITLIN: Great. All right, so that's the tip sheet and then this was the worksheet we had created with the two questions originally. I don't think that we sent the worksheet out ahead of time. We just sent the questions in emails, so if you want to offer this worksheet to your co-workers, colleagues, even participants, as you're thinking about goal setting with them, feel free to use it. It's just asking the two questions we talked about earlier on the webinar around what's the goal you've set in the past and what kind of self-assessment did you engage in. All right, well, and if you need any more information or you have any more questions or comments you want to share with me, this is my email address: csmith@empathways.org. I'm happy to continue communicating with all of you. I'm specifically working with the folks from South Dakota on this project, but I'm happy to support anybody else in thinking about goal setting. And that is it. Thank you all so much for taking part in this webinar.

SAMANTHA: Thank you, everybody. We look forward to seeing you all next month and hearing all your virtual voices.

CAITLIN: All right, bye now. I'm going to log off.

TINA: Thank you, everyone.