2310 GOAL ACHIEVEMENT (22-14)

Reach Up's mission is to join families on their journey to overcome obstacles, explore opportunities, improve their finances and reach their goals. Helping participants determine what goals they would like to focus on and how they may accomplish those goals is done using the goal achievement process, specifically GPDR-R.

○ **G**oal
○ **P**lan
○ **D**o
○ **R**eview
○ **R**evise

Language to get started

Use some of the following language to help explain the Reach Up program and introduce GPDR-R.

During an initial meeting with a family

- Description of Reach Up: Reach Up is a program that joins families on their journey to overcome obstacles, explore opportunities, improve their finances and reach their goals.

- Dual purpose: We want to help you meet your immediate needs so you can regain your economic footing and provide for your children, but we also are here to help you think ahead so that we can help you and your family permanently improve your circumstances.

- Starting point: We understand that everyone is at a different place in their path to improving their finances. We can take it one step at a time. What is one thing going on right now that you feel you would most like to change to help you improve things for you and your children? Stepping Stones is a tool we use to start a conversation about what is meaningful to you. We also have worksheets we can use together for you to write down steps you'd like to take. (Then use GPDR-R to work through this goal.)

Setting goals

Utilizing the life areas outlined on the [Stepping Stones tool](), participants will indicate what area is most important to them at the time and set a goal. For more information about Stepping Stones see procedure 2310A.

Language matters and if the terms "goal" and "plan" feel too formal, consider changing how the process is talked about. The goal achievement process and GPDR-R is designed to help someone move into intentional self-regulation, and out of automatic self-regulation—that is, rather than just being reactive and responding to the "crisis of the day," this is a way to be proactive and thoughtful about what they're going to do.

Ask questions like: "What is one change you could make in the next day/week that would make a difference for your current circumstances?" By giving the participant the chance to realize some "small wins" in a row, this can build their self-efficacy, which can help a participant make bigger, more meaningful progress in their life.

Personal goals versus goals to improve finances

Sometimes, goals will be personal goals instead of goals related to improving their finances (employment education, training, SSI). These personal goals can help a participant get started, build some self-efficacy, and then make progress toward employment.

Help participants recognize the connection between their personal goals and their goals to improve their finances. Taking steps towards personal goals, may help a participant get and keep a job in the future. When somebody is setting a personal goal, like child well-being or personal health, help them reflect on how their personal well-being in this area is going to set them up for success elsewhere in life.

Case manager role in determining goals

As participants work to identify their goals, use [motivational interviewing skills](#) to draw out the participant's motivations and help them discover the answers for themselves.

If the participant is interested in focusing on some type of education or career goal, pull in the employment, training and education specialist (ETES) to brainstorm and help participants consider their career goals and explore other opportunities. For example, a volunteer opportunity may make sense for a participant who does not yet feel ready to take part in job search but is interested in exploring their career goals while at the same time gaining some experience and building general workplace skills.

If a participant's goal does not seem to be attainable in their current situation, help the participant clarify the goal. For example, if a participant wants to be a marine biologist in Vermont, and there are not any marine biology jobs in the area, find out what about being a marine biologist appeals to them. Is it possible that they don't even want to live in Vermont, so is it realistic? Or

perhaps it is biology in general, or being outside, or being near the ocean? This conversation helps clarify the goal. Then work backwards to help them figure out the steps they need to take to reach their goal.

Goal storming

If participants are struggling to identify a goal, a fillable goal storming sheet may be useful.

Activating motivation

The goal achievement process, GPDRR and Stepping Stones are meant to provide the participant with space to articulate what is most important and motivational to them and where they want to start. During this process, it is important to be sensitive to the participant's readiness for change.

"Moving" participants from pre-contemplation or contemplation into preparation and action steps, should be movement that is *driven* by them and *facilitated* by the case manager. Rather than moving someone into action on an action step they are not ready for change in, nudge them toward action on goals which they have articulated they are committed to and ready to pursue.

Stepping Stones nudges participants more intentionally than a traditional "assessment." Do not push participants toward preparation and action steps to pursue goals they have not themselves identified and committed themselves to. A plan without motivation is not going to happen.

However, it is okay to help participants see connections between certain obstacles (such as lack of transportation and ID), and their current goals.

Documenting goal achievement

Make sure to document conversations around goal identification in case notes. Save copies of tools used (Stepping Stones and goal sheets) in the participant's electronic case file.

Creating a plan

Utilize goal sheets such as My Action Plan and My Goal Success Plan to help participants come up with specific and detailed plans for how they will accomplish their goal. Offer a copy of Participant Guide to Using GPDR-R, which provides tips about each step in the GPDR-R process.

Identifying other supports to hold participants accountable

Ask the participant to identify family or friends who may be able to help check in with them and make sure they have followed through on their plan.

If other supports cannot be located:

- Treat this as an opportunity to reaffirm and emphasize support for the participant, both as a safe space to reflect on what is getting in their way of goal progress and what they're learning as they pursue their goals.

- Encourage the participant by affirming the belief that they can make positive changes in their life, one step at a time.

- Recommend options for building up their social support network. If opportunities exist within the district office (workshops, peer support groups, etc.), or if there are other good resources in the community, feel free to suggest or recommend those as options to consider.

Identifying resources needed to accomplish goal

As participants set goals, invite them to consider what resources are required for those goals:

- Program resources – support services, coaching, checking in, incentives;

- The participant's own resources – family, social connections, income/savings; or

- Inaccessible or unavailable resources at that moment– a college degree requirement, space for a business, savings.

This exercise of identifying required resources helps the participant consider whether this is the right goal at the right time for them. It also helps them realize obstacles that they could address to reach their goal.

Do the plan

Allow the participant time to try out the plan. Schedule check ins as needed, and then follow up with reviewing and revising how it went.

Review and revise

At the next scheduled meeting, review what happened. What went well and what did not work? If the plan did not work, what got in the way and how could it be planned for differently? Is it still the right goal?

Changing goals

There is no hard-and-fast rule around the number of times someone can or should change their goal within a given period. With that said, if a participant wants to change their goal three successive times (that is, each time over the course of three consecutive meetings), this suggests that they may not be truly committed to the goals they've previously set.

Ask open-ended questions to help them reflect what they have learned when identifying the past few goals—that is, why did they set those goals in the first place and what specifically has led them to change their goal? It may be appropriate to hold them accountable to being honest and authentic about their goal.

Holding participants accountable does not mean moving directly to conciliation, sanction or closure. Always make sure each step of the goal achievement process is thoroughly reviewed and revised as needed. See procedure 2310B when participants continue to not follow through.

Remind the participant that it is okay to change or abandon a goal—after all, that is what happens sometimes. The main thing is that the participant is making a good faith effort to pursue their goals and when they encounter a challenge or obstacle, they are willing to review and revise their plan. The road to goal success involves failures, u-turns, and several hard lessons; part of facilitating that journey with and for participants is being willing to give more control over to them to prioritize the process for themselves.

Case Manager Support

The [Reach Up Case Management Page on SharePoint](#) is full of GPDR-R related resources, including goal sheets, sample goal plans, and other resources.

[The Goal, Plan, Do, Review and Revise (GPDR/R) Manual](#) is an executive function-informed goal achievement framework for use in human service programs developed under the lead of LaDonna Pavetti, Vice President for Family Income Support at the Center on Budget and Policy Priorities.

The [Your Money, Your Goals](#) toolkit was created by the Consumer Financial Protection Bureau (CFPB). The toolkit is a collection of important financial empowerment information and tools you can choose from based on the needs and goals of the people you work with.