

## **2310 GOAL ACHIEVEMENT (Continued)**

### **P-2310A Stepping Stones and Goal Achievement (22-14)**

The purpose of using [Stepping Stones](#) is to engage participants in a meaningful way that helps them move forward, improve their financial situation, and eventually move off of Reach Up. Stepping Stones is a tool that helps start a conversation with participants about what is personally meaningful to them, and helps participants set goals which build on their own internal, or intrinsic, motivation.

Stepping Stones is trauma informed, because it empowers participants, offers choice, and does not require them to divulge more information than they are comfortable sharing. It also focuses on participants' strengths and possibilities for the future.

#### **Introducing Stepping Stones to participants**

The Stepping Stones process should be used with everyone who receives Reach Up, including minor parents and mandatory youth.

#### ***How often to use Stepping Stones***

Stepping Stones should be used with every new participant a case manager works with, and then at a minimum every 6 months. Each participant will be very different, and some participants may want to use Stepping Stones more often. Stepping Stones should be used to help participants identify their goals and move forward.

#### ***Three ways to use Stepping Stones***

Initially, as a springboard into goal setting:

- Focus on the life areas along the left-hand side of the page.

Periodically, to reflect on and visualize goal progress (Goal Plan Do Review Revise--GPDRR):

- Focus on the life areas within which the participant has been pursuing goals.
- Invite the participant to indicate where they see themselves (using the bubbles).

- When one goal is accomplished, bring out Stepping Stones to explore what's next.
- If someone is struggling to reach their goal, use Stepping Stones to investigate if another life area is requiring the participant's attention instead.

Regularly, to prime and structure meetings:

- Once the participant is familiar with Stepping Stones, send a copy to them before a meeting, or invite them to fill it out before the meeting begins, or right at the beginning.
- Use their bubble ratings to gauge any changes.
- Use their answers to other questions on the form to focus the discussion accordingly.

### ***Using Stepping Stones with participants***

If participants are meeting their goals with their current plan, leave the plan as is, and use the tool to build on their existing goals.

If Stepping Stones has not yet been used with an existing participant, be transparent about the fact that the Reach Up program is trying out a new approach and tool. Mention that Stepping Stones is a different way of "doing assessment" and that the focus is more intentionally on goals.

Use the introduction as an opportunity for the participant to:

- Step back and think about the different areas of life, even though they may have been working on a variety of goals (many of these same areas) over the past few months or years; and
- Be reflective on what has worked versus what has not worked in the past.

This introduction may avoid the disjointedness of simply switching to a new tool without context or some way of bridging the conversation.

### ***Use of Stepping Stones with participants in crisis***

When a participant attends a meeting and self identifies as being in crisis, it makes sense to not start with Stepping Stones, because the participant needs to focus on one particular issue. In the moment, focus on helping them take one small step forward—something they can do today, tomorrow, or this week—such

as taking a shower tonight, or having some place to sleep. Don't let the Stepping Stones tool get in the way of meeting those urgent needs.

After the crisis has been addressed, it can be helpful to come back to Stepping Stones to reflect on the participant's life as a whole. Circling back around to think about other life areas can help the participant think beyond the crisis.

## **Resisting the urge to gather all information up front**

In general, avoid leading a conversation with questions about topics such as housing, transportation, or criminal history to name a few, for the mere reason of collecting information. Instead, these topics should come up either because the participant feels that they are important and wants to discuss them (jumping off of the Stepping Stones tool), or because they relate to a challenge or obstacle to the participant's goal.

For example, it may be appropriate to discuss criminal history if the participant's goal relates to applying for a job where criminal history will pose a challenge to their plan to get that job. Rather than leading with a question about criminal history, ask an open-ended question along the lines of: "So, as we think about your plan to apply for this job, are there any aspects of your previous experience that you think help or hinder your chances? How might you address these strengths or challenges as you apply and interview?"

## **Discovering hidden obstacles**

Sometimes while using the Stepping Stones process, obstacles the participant were grappling with surface, such as lack of consistent transportation, or fear of using child care. Explore with the participant what they might do to reduce or eliminate that obstacle if it is getting in the way of their goal.

If a participant does not want to address the obstacle that is getting in the way of their goal, this is a valid tension, and it is important to name it and recognize it.

In some circumstances, this means allowing the conversation to lead to topics that do not seem most important (for example, the participant wants to focus on physical health when their housing situation is in crisis).

A good facilitator will do the following:

- Use open-ended questions to draw out the "why" and the "how" of the participant's goal;
- Redirect the conversation back to the participant's goal or area of focus if they begin to discuss other issues or matters by reemphasizing what you

heard their goal to be and checking to make sure that is still what they want to focus on; and

- If the participant would like to focus on something else, confirm that as well.

At its core, this approach is about starting where the participant is at and where their motivation lies, and then pursuing goals from there. Other life circumstances and issues will undoubtedly arise in the pursuit of those goals; as they do, it's important to facilitate the participant's reflection about whether those other areas/circumstances merit their attention now—that is, if the participant is focused on a goal related to education, but in the process of doing so, they learn that their housing is really getting in the way, that may be an opportunity for them to step back and consider focusing on their housing to get to that education goal.

### ***Discrepancy between Stepping Stones and case manager insight***

If a participant indicates a life area is "fine" on the Stepping Stones tool, but prior conversations or events have shown the area may not be fine, respect the participant's desire to not address the obstacle at that moment. However, enter it as an "interfere" on the Family Support Matrix (FSM) and document the entry in case notes. (See the Reach Up Services procedure [P-2305 Assessment](#) for more information about the FSM.)

The Stepping Stones process puts more control in the hand of the participant. They are the ones that need to make the decision about what to prioritize and work on. If they do not see those other areas as obstacles or important things to focus on, let it go. In walking them through the process, they may come to realize the importance of these other issues, but it will be their own self-awareness, rather than telling them what to focus on and what to do.

While it can seem valuable to direct the participant to focus on certain priorities, that does not necessarily build their capacity or skills. This results in fixing things for them, which may land them right back in the same situation again.

### **Case Manager Support**

Until a finalized version is made into an official ESD form, the Stepping Stones tool can be found [here](#) on SharePoint.

### ***Stepping Stones tool and the case management file***

The Stepping Stones tool should be printed in color.

If the Stepping Stones tool is completed, either on paper or electronically, it should be kept in the first brad of the file and documented in case notes. If the

tool is not written on, then the tool does not need to be kept; just document the process in case notes.

The tool should be placed in the first brad. If documentation is gathered to support the participant's goal refer to the [RU CM file retention schedule](#) to determine the best place for the document.

### ***Documenting the use of Stepping Stones***

Participant and case manager should decide if they complete the tool or discuss the tool without actually writing anything on paper or completing it electronically. The case manager should document the process in case notes.

If the "paperwork" of Stepping Stones is getting in the way of an authentic conversation with the participant, set it aside for the moment. Stepping Stones is not primarily a tool for documentation. It is meant to facilitate an increase in self-awareness and self-reflection on the part of the participant, with the case manager in dialogue.

At the end of a session, consider briefly using the paper/electronic version of the tool to somehow reflect on the conversation that was had—even if that is simply marking the domain discussed, or filling in one or two of the bubbles. The focus should be on goal-pursuit; Stepping Stones is a springboard into goal pursuit, and a way to reflect on starting points and progress along the way.

### ***Entering Stepping Stones goals on FDPs***

If a participant's goal does not align with current activities in ACCESS, use an activity in ACCESS that most closely matches the participant's goal. Indicate in case notes the reason for selecting the specific activity.

If unsure of the correct activity to choose, review the case with the Reach Up Supervisor. If additional support is needed, send an email to AOPS.

### ***Balancing the use of Stepping Stones among the caseload***

Stepping Stones does not automatically increase the amount of time spent with a participant. Not every participant is going to be "intensive" – requiring long meetings on a weekly basis. Considering the caseload as a whole, there will be participants who do not need such consistent touch points.

The Stepping Stones tool is more targeted and may allow the conversation to be more focused, in a way that at least does not add time, and might even take less time. For example, "Last time we talked, you identified transportation as the area you would like to focus on. Is that still the case?"

If documenting each life area in case notes, just update the area that changed when reviewing with a participant. "Reviewed Stepping Stones tool over the phone with participant. Housing: now listed as strength. Transportation: identified as needs help. All else is the same."