



# CalWORKs 2.0 | Next Generation

## **Goal Achievement: A Deeper Dive** Webinar #2

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Facilitated by:

Michelle Derr, Mathematica Policy Research

LaDonna Pavetti, Center on Budget and Policy Priorities

Natasha Nicolai, Mathematica Policy Research

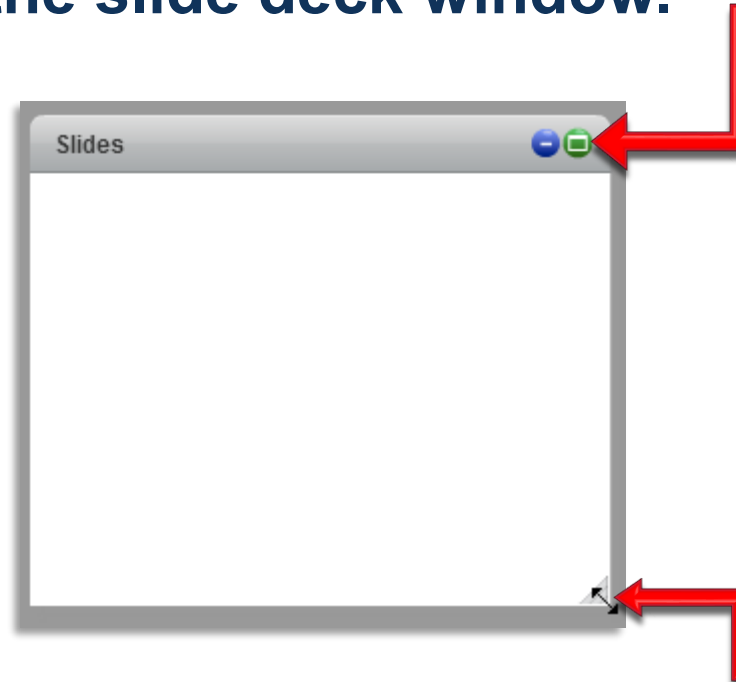
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August 9, 2017 2:00 – 3:00 p.m., PT

# Expand Event Windows

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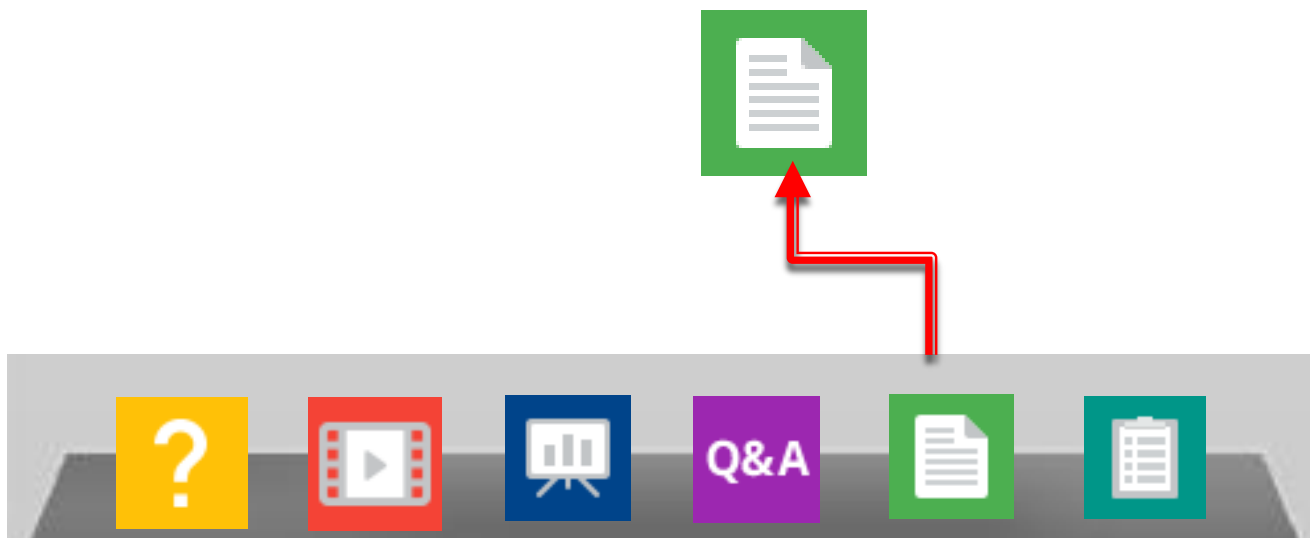


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# Event Materials and Recording

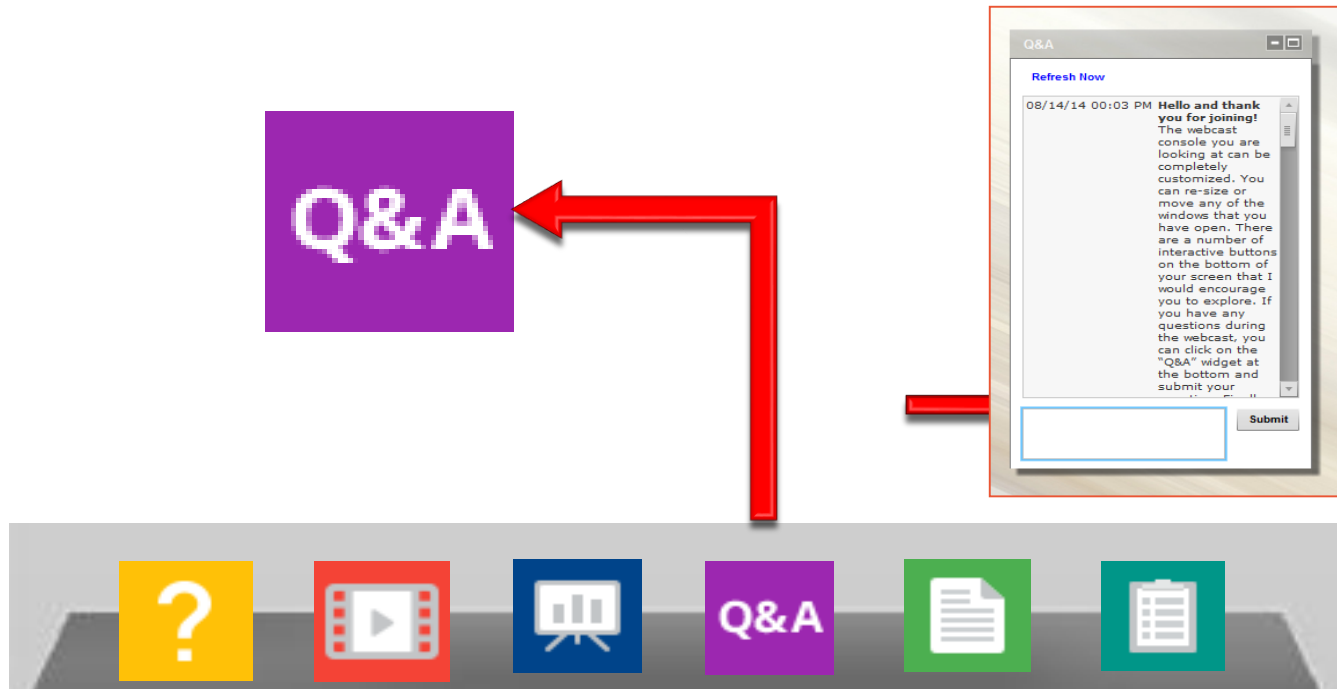
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- The event recording will be available approximately one day after the webcast and can be accessed using the same audience link used for the live webcast.
- The recording will also be posted to the website
- To download the slide deck and materials for this presentation, click the “Resource List” widget at the bottom of your screen.



# Q&A

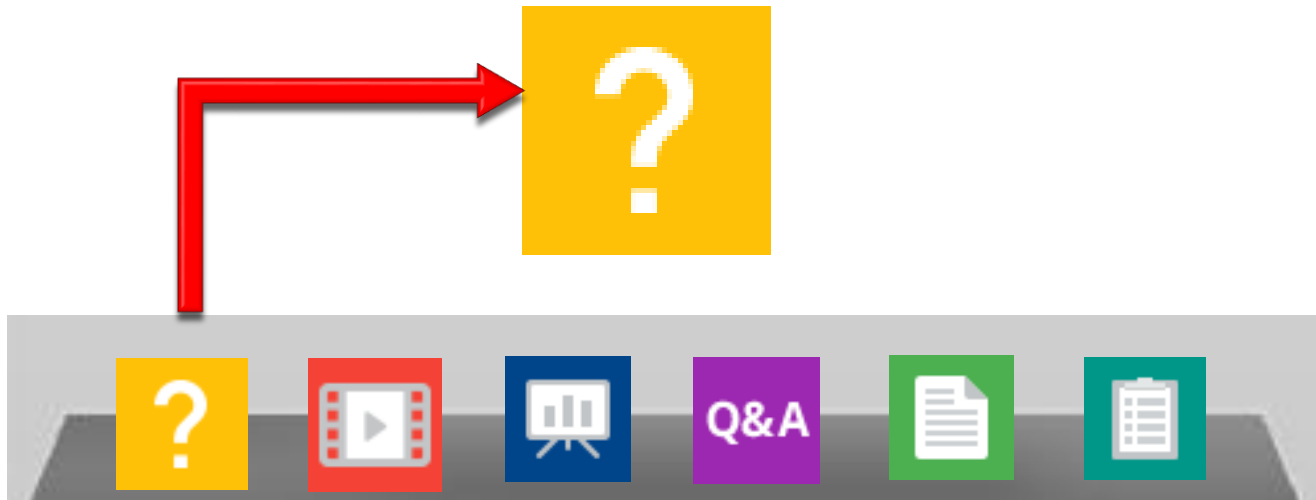
- To pose a question to the presenters or the group at any time, click on the Q&A widget at the bottom and submit your question.
  - *Please note, your questions can only be seen by our presentation team and are not viewable by other attendees.*



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- You can also click on the Q&A widget to submit technical questions.



# Welcome and Introductions

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**Natasha Nicolai**

**Mathematica Policy Research**

**Project Director, CalWORKs Strategic Initiative**

# What Are Counties Already Doing?

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- Customer-driven goal setting
- Individualized services
- Supportive, conversational tone
- Tools and workshops to build goal-setting skills

If you missed the last webinar, you can watch it at any time at [www.CalWORKSnextgen.org](http://www.CalWORKSnextgen.org).

# Questions

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- Ask a question at any time during the webinar
- We will respond during the webinar or afterward
- We may answer some of your questions in future webinars





# Facilitators

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**Michelle Derr**

Mathematica Policy Research  
Co-Principal Investigator, CalWORKs  
Strategic Initiative



**LaDonna Pavetti**

Center on Budget and Policy Priorities  
Co-Principal Investigator, CalWORKs  
Strategic Initiative

# Webinar Series

This second webinar is designed to give you a full understanding of a goal achievement framework and how it applies to the TANF population.

The remaining webinars will explore evidence behind the new tools and resources and encourage county-to-county sharing on issues beyond the tools and resources.

Webinar Wednesdays - 2 p.m.	
Today	Goal Achievement—A Deeper Dive
August 30	Executive Functions: Critical Skills for Goal Achievement
September 20	Using Science to Understand and Improve Adult Capabilities
October 11	Using SAWS Data to Manage Programs
October 25	Engagement Strategies to Help Families Stay in Compliance

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# Objectives

# During This Webinar We Will:

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- Review a science-based goal achievement framework
- Draft a plan for our own work-related goals
- Identify how we would like to learn more about incorporating this into our program

# What Do We Mean by Goal Achievement?

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- We use goal achievement to refer to the *process* that individuals go through to achieve an outcome that wouldn't occur without effort and specific direction



# Why Focus on Goal Achievement?

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- Grounded in science
- Compatible with key program purposes, but provides a way to enhance service delivery
- Provides a framework that can guide individual, organizational, and community goals simultaneously
- Creates a structure for measuring interim progress toward longer-term goals – especially useful for individuals with significant employment barriers
- Changes the message about CalWORKs 2.0, leading to improved engagement and motivation in CalWORKs customers
  - CalWORKs 2.0 is a program that helps families **set and achieve their goals**

# The Science Behind Goal Achievement

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- **Achieving a goal is an effortful process that draws on a foundational set of capacities—executive function or self-regulation skills—that help us to:**
  - Focus
  - Make decisions with information available to us
  - Set goals
  - Make and execute plans
  - Revise and adjust
  - Control impulses
- **Living in poverty degrades executive function and self-regulation skills**
  - How we design and deliver services matters
- **Evidence that process matters**
  - How goals are set
  - How plans are developed
  - When obstacles and solutions are identified
- **Today's webinar focuses on process; the next webinar will focus on skills and poverty's impact on them**

# WOOP

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- **WISH:** What is your wish?
- **OUTCOME:** What is the best outcome?
- **OBSTACLE:** What is your main *inner* obstacle?
- **PLAN:** Make a plan

*For more information and practice on WOOP:*

*<http://woopmylife.org/woop-1>*





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# **Goal, Plan, Do, Review/Revise: A Science-Informed Approach to Goal Achievement**

# A Goal Achievement Framework for Employment and Human Service Programs

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- **G**oal: What do you want to accomplish?
- **P**lan: What will it take to get there?
- **D**o: How will I successfully execute the plan?
- **R**eview: How did I do?
- **R**evisе: What will I change?



# Poll Question

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- Which of the steps in Goal-Plan-Do-Review/Revise do you think will be the most challenging for customers?
  - Goal
  - Plan
  - Do
  - Review/Revise

# **Goal: Something We Want to Accomplish**

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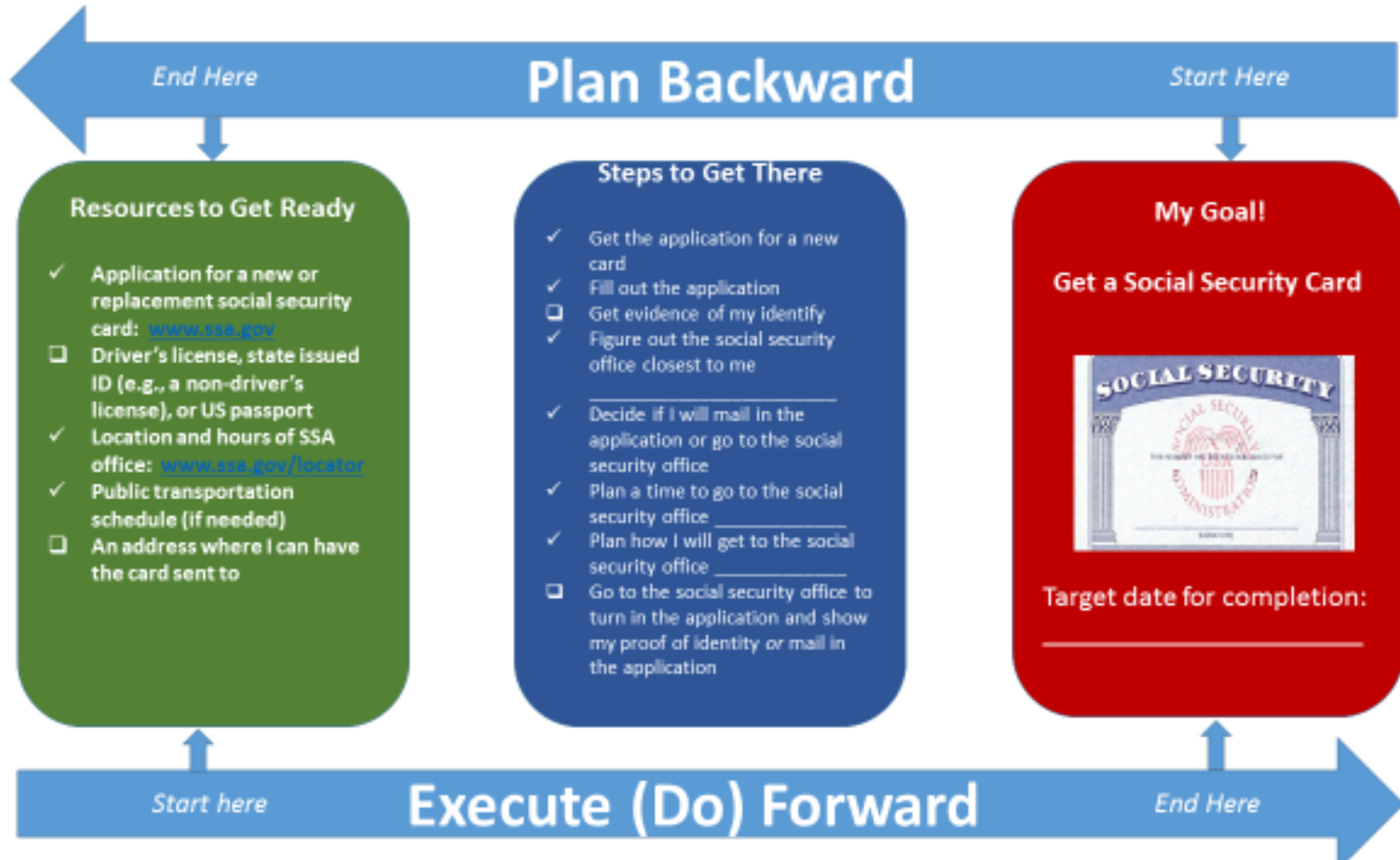
- **Characteristics of “good” goals**
  - **Personally meaningful**
  - **Challenging but within reach**
  - **Well defined**
- **Strategies for achieving goals that stick**
  - **Start with the future**
  - **Imagine what the future looks and feels like**
  - **Write goals down; keep them visible**
  - **Start small**

# Plan: Creating a Road Map for Change

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- Three steps for developing effective plans
  - Break big goals down into small, manageable steps (backward mapping)
  - Develop specific and targeted action plans
  - Identify obstacles and strategies for responding to them *before* they occur
- Characteristics of effective plans:
  - Identify action steps and resources needed
  - Written down
  - The more detailed, the better: what, when, where, how
  - Streamlined to have as few steps as possible
  - Obstacles and responses to them written down and/or rehearsed: “If....then”

# Plan: Example of Backward Mapping



# Plan: Example of Action Plan

Name \_\_\_\_\_ My Goal \_\_\_\_\_  
 Action Plan Start Date \_\_\_\_\_ Action Plan Review Date \_\_\_\_\_

Things I need to do	When I will do them (date and time)	Things I need to take with me	Where I will go and how I will get there

Obstacles and solutions	
What could get in the way	My solution

# **Do: Put the Plan Into Action**

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- Executing the plan is in the hands of the participant
- Well-designed goal-setting and planning processes increase the chance of successful execution
  - Create positive motivation: meaningful goals; visualizing the outcome
  - Make plans feasible: small steps; detailed action plans
  - Anticipate obstacles: “If...then” plans
- Strategies for providing additional support
  - Walk through the action plan with the participant
  - Help participants set up their own reminders
  - Provide reminders via email, text or phone calls
  - Encourage teamwork
  - Provide opportunities to practice difficult tasks
  - Help participants come up with strategies to make unpleasant tasks less unpleasant



# **Review and Revise:**

## **Stepping Back, Moving Forward**

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- We rarely get goals or plans right on the first try
- Opportunity to create an ongoing learning opportunity and build skills
- Review
  - Strengths-based: What went well?
  - Forward-looking: What didn't go as planned? What got in the way?
  - Learning: What did you learn about yourself?
- Revise
  - Updated action steps
  - New plan
  - New goal

# Question

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- **In the road test counties, we've heard some examples of challenge points working with customers.**
  - One example of this is that the review/revise step can be challenging, especially if customers have not met their goals.
- **When you envision using these tools with customers, where do you anticipate facing challenges, and what are some proposed solutions?**
- **Please respond in the Q&A box**

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# Putting the Science into Practice

# Becoming Goal-Focused—Current Challenges

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- Federally defined work activities run parallel to and are often in conflict with “personally meaningful goals”
- Assessments focus on barrier removal rather than client strengths and interests; also, they are typically past- rather than future-oriented
- Staff are often directive rather than collaborative in identifying a goal and developing a plan
- Goal planning lacks sufficient specificity, granularity, and time required for successful “doing”
- High workloads prevent frequent review of client goal progress

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# CalWORKs 2.0— Tools and Resource Opportunities

# CaIMAP

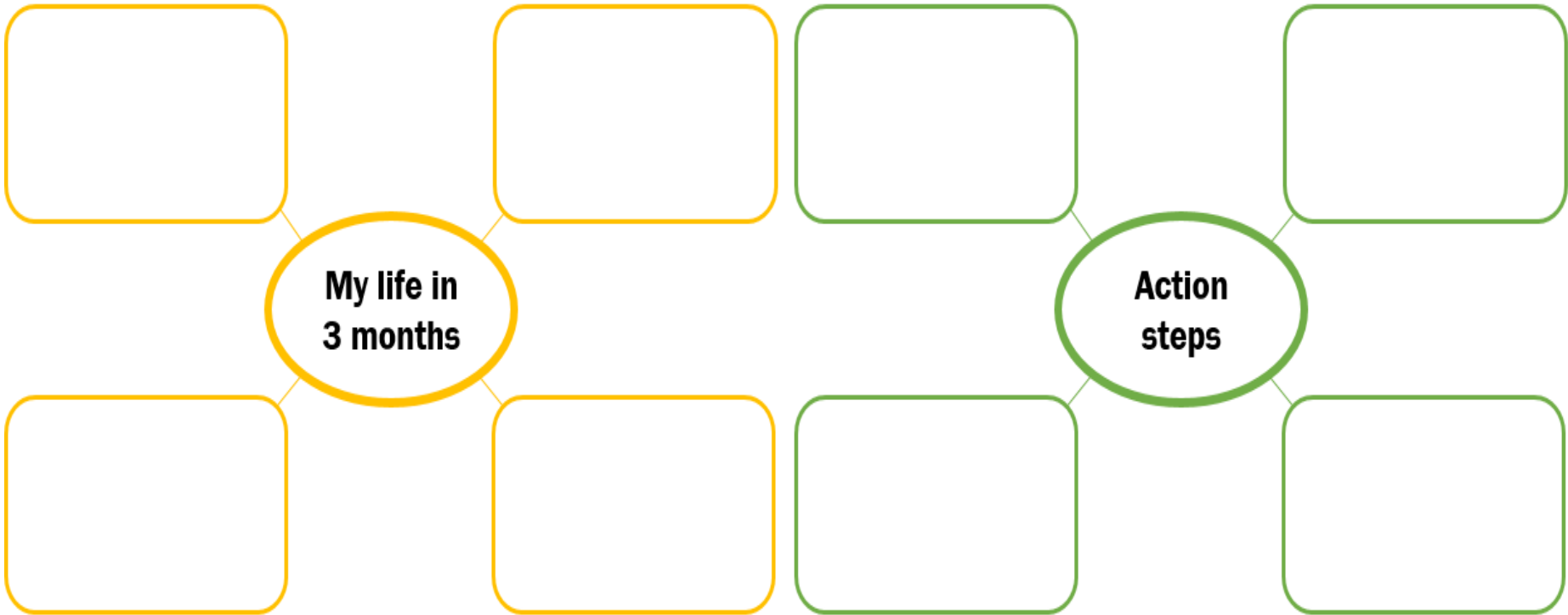
Life Areas		Area of significant need <i>Requires specialized services</i>	Area of need <i>Can be addressed through regular CalWORKs services</i>	Stable <i>No immediate need, but situation could use improvement</i>	Thriving <i>Area of Strength</i>
Work and education	<i>Employment</i>	Not currently employed, with limited work history	Not currently employed, but with recent work history, or in a temporary work situation that is ending in the next 60 days	Steady employment either part-time, or full-time without a sustainable wage	Steady full-time employment at a sustainable wage
	<i>Education and skills training</i>	Has no diploma, GED, or training credential or has limited English proficiency	Has no diploma or GED, but with work experience or training credential; proficient in English	Has diploma or GED, but needs additional education or training to achieve career goals; proficient in English	Has some post-secondary education or specialized training; proficient in English
Work supports	<i>Transportation</i>	Has no access to public or private transportation	Is rarely able to meet transportation needs; relies on friends and/or family	Has access to public or private transportation, but has some trouble accessing it on a regular basis	Always meets transportation needs through car, bus, or regular rides
	<i>Child care</i>	Has no access to child care	Has child care access but significant downsides in terms of reliability, accessibility, affordability and safety	Has child care access, but a few downsides in terms of reliability, accessibility, affordability and safety	Has reliable, accessible, affordable and safe child care or does not need child care
Personal and family needs	<i>Physical and mental health</i>	Has untreated physical and/or mental health needs	Has physical and/or mental health needs and inconsistent care/treatment	Has physical and/or mental health needs but is able to access treatment most of the time	Has good physical and/or mental health or has access to treatment all of the time
	<i>Substance use</i>	Currently using substances and no plans for treatment	Currently or recently (past 30 days) used substances but is in treatment or planning to enter it	Used substances in past six months, but actively engaged in treatment and no use in past 30 days	Has not used substances in the past six months
	<i>Housing</i>	Currently homeless or has eviction notice	Lives in temporary housing/shelter or is at risk for eviction	Has housing subsidy or is in low-income housing, but not in a safe location	Rents or owns in a relatively safe location; reasonable housing costs
	<i>Legal</i>	Has current significant legal issues that affect basic needs of living (such as housing, access to benefits, employability)	Has current moderate legal issues but has no assistance in addressing them	Has current moderate legal issues, but has adequate representation/legal assistance	Has no current legal issues
	<i>Safety</i>	Involved in unhealthy relationships; usually feels unsafe at home and has no support system	Involved in unhealthy relationships; sometimes feels unsafe at home, but has family and/or community support and "safe places" to go	Involved in unhealthy relationships, but is safe at home	Involved in healthy relationships and feels safe at home
	<i>Child and family needs</i>	Has household member with untreated physical and/or mental health and/or school-related needs and no care/treatment	Has household member with physical and/or mental health and/or school-related needs and inconsistent care/treatment	Has household member with physical and/or mental health and/or school-related needs but they are able to access treatment most of the time	No household members have physical and/or mental health and/or school-related needs or they have access to treatment all of the time
	<i>Other needs</i>				

# CaIMAP

Life Areas		Area of significant need <i>Requires specialized services</i>	Area of need <i>Can be addressed through regular CalWORK's services</i>	Stable <i>No immediate need, but situation could use improvement</i>	Thriving <i>Area of Strength</i>	Action Plan - Resources for you
Work and education	<i>Employment</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Education and skills training</i>	Area of Significant Need	Area of Need	Stable	Thriving	
Work supports	<i>Transportation</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Child care</i>	Area of Significant Need	Area of Need	Stable	Thriving	
Personal and family needs	<i>Physical and mental health</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Substance use</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Housing</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Legal</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Safety</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Child and family needs</i>	Area of Significant Need	Area of Need	Stable	Thriving	
	<i>Other needs</i>	Area of Significant Need	Area of Need	Stable	Thriving	

# Goal Storming

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# My Road Map

## My Road Map

Where I'm headed:  
*My ultimate goal*

Progress Goal #3:

Progress Goal #2:

Progress Goal #1:

Three yellow squares with lines

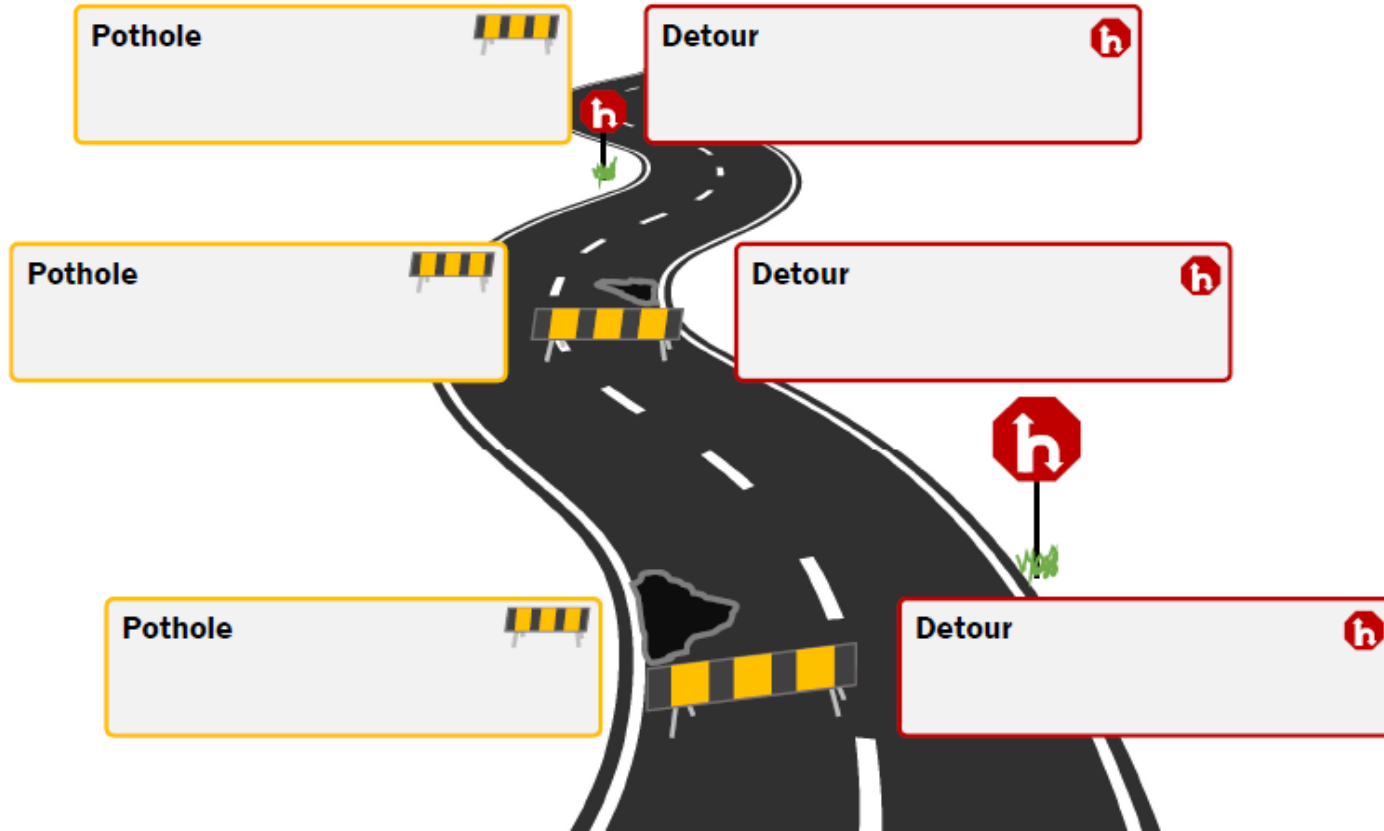
Three blue squares with lines

Three green squares with lines

The graphic features a central winding road with white dashed lines. To the left of the road, there are three colored boxes (yellow, blue, green) representing progress goals, each with a small grass tuft icon below it. To the right of the road, there are three yellow squares, three blue squares, and three green squares, each with a horizontal line extending to the right, representing lists of sub-goals or tasks. At the top, an orange box contains the text 'Where I'm headed: My ultimate goal'.

# Potholes and Detours

## Potholes & Detours



# My Goal Plan

## My Goal-Plan-Do-Review

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**GOAL**

What do I want to do?  
Why do I want to do it?

**PLAN**

How will I do it? When? Where?  
What might get in my way?

**DO**

What small first step will I take?  
How will I reward myself?  
Who will I check in with?

I will do it by: \_\_\_\_\_

**REVIEW  
REVISE**

How did it go?

What could I do  
differently next time?

# My Goal Plan

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## Goal

*What do I want to do?*



## Plan

*How and when will I do it?*

*Pothole:*

*Detour:*



## Review

*How did it go? What did I learn?*



## Revise

*What do I do next?*

# Poll Question

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- Which tools are you interested in using with families?
  - CalMAP
  - Goal storming
  - My Goal Plan
  - My Road Map
  - Potholes and Detours

# Poll Question

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- **As you think about how you might incorporate new goal achievement tools, what would be most helpful as you continue to learn about them?**
  - In-person training
  - Webinars
  - Instructional videos
  - Road test
  - Other

# Questions/Comments?

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- What questions or comments do you have about the draft tools?
  
- Please respond in the Q&A box

# Next Webinar

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- **Wednesday, August 30, 2:00 p.m. PT**
- **Topic: Executive Functions: Critical Skills for Goal Achievement**
- **Webinar registration link will be in next newsletter**
- **If you are not receiving the newsletters, create an account on the website and you will automatically receive the next newsletter**
- **This webinar and follow-up materials will be available for your reference on the website home page**