

IMPLEMENTATION OF A GOAL-ORIENTED APPROACH TO PROVIDING EMPLOYMENT SERVICES TO CASH ASSISTANCE RECIPIENTS

The Lifelong Learning Initiative in Ramsey County, Minnesota

JOB SEARCH ASSISTANCE STRATEGIES EVALUATION



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Implementation of a Goal-Oriented Approach to Providing Employment Services to Cash Assistance Recipients: The Lifelong Learning Initiative in Ramsey County, Minnesota

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Overview

Introduction

This report describes the early implementation of the Ramsey County, Minnesota, Lifelong Learning Initiative (LLI). The LLI uses a goal-oriented approach to help recipients of the Temporary Assistance for Needy Families (TANF) program, known as the Minnesota Family Investment Program (MFIP), set their own employment-focused goals and break them into smaller, manageable, and achievable tasks. It is based on research suggesting that chronic stress associated with living in poverty can hinder the development of planning, decision-making and organizational skills, sometimes broadly defined as executive skills (Blair and Raver, 2016). The LLI aims to help recipients develop these executive skills as they work towards positive employment outcomes.

Starting in 2015 and working with a team of experts, the Ramsey County Department of Workforce Solutions designed and implemented the LLI to incorporate a goal-oriented approach into its TANF employment services. The LLI includes a new approach for TANF recipients' employment counselors to guide, rather than direct, goal-setting and achievement activities for recipients; tools for employment counselors to support goal-oriented coaching provided to TANF recipients; and a redesigned TANF employment services orientation. The key steps in the approach are

- 1) conducting assessments to **learn** about recipients' strengths and weakness;
- 2) collaborating with recipients to guide them towards building **goals** that are a good fit;
- 3) working with recipients to set **plans** to achieve goals;
- 4) supporting recipients as they **do** individual tasks; and
- 5) **reviewing** progress on task achievement and setting new goals.

Recognizing the interest in this type of approach to improving employment outcomes for low-income populations, the Office of Planning, Research, and Evaluation (OPRE), within the Administration for Children and Families at the U.S. Department of Health and Human Services, sponsored this implementation study of the LLI. Abt Associates conducted the study as part of its Job Search Assistance Strategies Evaluation.¹

Overall, the study found that most elements of Ramsey County's LLI were well-implemented and viewed favorably by staff, although it took a significant investment in developing the initiative and training staff. As it is a new approach, Ramsey County continues to make refinements and adjustments to their program. Additional research and evaluation is needed to determine the effectiveness of this approach and the extent to which the approach results in improved employment and earnings and family well-being.

¹ More information on the Job Search Assistance Strategies Evaluation can be found on ACF's Office of Planning, Research, and Evaluation website: <https://www.acf.hhs.gov/opre/research/project/job-search-assistance-evaluation>.

Primary Research Questions

- What is the context in which the LLI operates?
- How was the LLI developed and designed? How were staff trained?
- How was the LLI implemented? What features were strongly implemented? What challenges did managers and staff face?
- What were the staff perceptions of the LLI?
- What are the operational lessons for policymakers and program administrators interested in exploring a goal-oriented approach to providing employment services, particularly for cash assistance recipients?

Purpose

This study documents Ramsey County's experience incorporating the goal-setting principles into their TANF program, and provides lessons for others interested in this approach. The TANF program provides cash assistance to low-income parents, as well as a range of other supports and services to help them become self-sufficient, such as employment-related services, childcare, and transportation. To date, employment-related services designed to improve cash assistance recipients' employment outcomes and reduce dependency have had mixed results. Many TANF recipients struggle to find and keep jobs and increase their incomes above the poverty level despite the assistance provided.

Interventions using a goal-oriented framework in non-TANF settings have been found to successfully improve a range of outcomes including academic performance, educational attainment, and health (Duckworth et al., 2014; Oettingen et al., 2015). Because of its success in other settings, a number of researchers and program administrators developed a set of goal-oriented principles for employment programs that provided the basis for Ramsey County's Lifelong Learning Initiative.

Key Findings and Highlights

- **Staff have a favorable view of a goal-oriented approach to guide recipient's engagement in program activities.** The vast majority of staff reported that the LLI was a better way to work with recipients compared with an approach where employment counselors were more prescriptive in directing recipients' program activities (e.g., job search and readiness activities, work experience, vocational training). While some of recipients' incremental goals under the LLI were not specifically focused on job search activities *per se*, staff reported recipients were taking steps to resolve issues they viewed as necessary for employment (e.g., goals related to obtaining stable housing or regular childcare would improve the likelihood of employment in the long run).
- **Ramsey County program administrators invested considerable resources to develop the LLI and train employment counselors.** This included contracting with several expert consultants to develop and refine the approach and to train staff. Program administrators and employment counselors also reported that it took time, practice, and ongoing guidance to learn to use the new approach and tools and change how they interacted with recipients.

- **Caseload size and other responsibilities are important considerations when implementing an LLI-type approach.** Counselors consistently reported that the goal-oriented approach required more time with recipients than a more directive approach and this could be difficult given high caseload sizes. The ability of staff to use their discretion in the application of the LLI tools was important when staff faced high caseloads. Providing guidance on which tools to prioritize, and in which situations, appears to be an important next step in the refinement of the approach.
- **Employment counselors varied in using all tools consistently.** Staff reported high levels of use for the initial assessment tool and the tools to set and track goals, while they experienced more difficulty with the executive skills-oriented ones. Additional supports for counselors – including regular expert-led training or guidebooks with examples – may help them feel more comfortable working with recipients to develop executive skills-informed goals.
- **Appropriate staff selection is important for implementing the LLI approach.** Program managers reported that staff with certain types of skills (e.g., flexibility in their approach to recipients, coaching backgrounds) were able to adopt the LLI approach more easily than staff who are generally more prescriptive in their overall approach.
- **It is important to balance recipient-driven goal development with a focus on employment outcomes in a mandatory employment services program.** Using goal-oriented coaching within a TANF program requires a balance between goals and tasks that focus on addressing barriers to employment (e.g. housing, mental health, children’s needs) and those focused on moving directly to employment. All TANF programs must meet federal rules, known as the work participation rate (WPR), requiring that a specified proportion of cash assistance recipients participate in work-related activities. Because of Minnesota’s success in meeting the WPR, the state and Ramsey County issued guidance, prior to and independently of the LLI, that allowed flexibility in the types of activities recipients could attend to meet the WPR. LLI staff reported that it would have been difficult to implement the LLI as intended without this flexibility.

Methods

This implementation report focuses on development and early operation of the LLI from its start in February 2016 through July 2017. The report is based on three site visits conducted in March 2015 (before the LLI was implemented), July 2016, and March 2017. The goal of the visits was to document the implementation of the LLI tools and coaching approach, as well as changes made to the program over time. In addition, the evaluation team conducted an on-line survey of employment counselors who were using the LLI to document their perception of the LLI and use of LLI tools. Of the 16 employment counselors surveyed, 13 responded for an 81 percent response rate. Finally, the March 2017 site visit included a focus group with 11 MFIP recipients who worked with a LLI employment counselor.

Executive Summary

The Temporary Assistance for Needy Families (TANF) program provides cash assistance to low-income parents, as well as employment-related services to help them become self-sufficient. Balancing the provision of cash assistance with individual responsibility, TANF requires recipients to participate in a specified set of work activities as a condition of benefit receipt. Policymakers and program operators across the country have implemented, and researchers have evaluated, different types of services designed to improve cash assistance recipients' employment outcomes and reduce dependency. Evaluations found programs have mixed results helping recipients find and keep jobs. Moreover, many families do not gain the stability necessary to succeed in the labor market despite the assistance provided.

This report describes the early implementation of the Lifelong Learning Initiative (LLI) in Ramsey County, Minnesota. The LLI uses a “goal-oriented” approach to help TANF recipients set their own employment-focused goals and break them into smaller, manageable, and achievable tasks. It is based on research suggesting that chronic stress associated with living in poverty can hinder the development of planning, decision-making and organizational skills, sometimes broadly defined as executive skills (Blair and Raver, 2016). The LLI aims to help recipients be aware of and navigate through these executive skills as they work towards positive employment outcomes. Ramsey County is among the first TANF programs to integrate this goal-oriented approach into its employment services.

Recognizing the interest in this type of approach to improving employment outcomes for low-income populations, the Office of Planning, Research, and Evaluation (OPRE), within the Administration for Children and Families at the U.S. Department of Health and Human Services, sponsored this implementation study of the LLI. Abt Associates conducted the study as part of its Job Search Assistance Strategies Evaluation.

Development and Design of the Lifelong Learning Initiative

The Minnesota Family Investment Program (MFIP) is the state's TANF program. It is county-administered; all counties have flexibility in the operation of the program, including employment services. In Ramsey County, a primarily urban area that includes the city of St. Paul, the Ramsey County Department of Workforce Solutions administers the program, and the department or one of five contracted vendors provide employment services. The state requires most MFIP recipients to participate in federally defined work-related activities in order to help the state meet the federal work participation rate (WPR). Minnesota historically has had success in meeting the WPR, and in 2014, issued guidance allowing MFIP recipients in all counties to pursue a broader range of work activities and choice over the employment services they receive.

Starting in 2015 and working with a team of experts in social service delivery, counseling, employment programs and researchers, Ramsey County designed and implemented the LLI to incorporate a goal-oriented approach into MFIP employment services.

To implement the LLI, Ramsey County integrated several new elements into its MFIP employment services. These include:

- **Employment counselors who coach to guide, rather than direct, goal-setting and achievement activities.** The coaching approach is designed to shift from a directive-style of working with recipients (i.e., defining activities on behalf of recipients) to a recipient-driven approach. Employment counselors coach recipients in setting goals that are challenging but achievable and meaningful (referred to as “goodness of fit”). Employment counselors use a strategy called “scaffolding” to assist recipients in breaking their goals into small tasks, and then provide support as needed.
- **Tools to support goal-oriented coaching.** LLI developers designed several tools (shown in Appendix A) to support the goal-oriented coaching, including an assessment tool to examine recipients’ circumstances across 10 broad domains (e.g. employment, housing, health, children’s needs); tools to help counselors assist recipients in goal-setting and to monitor progress; and tools to identify executive skills strengths and weaknesses. The LLI tools are not intended to be used with or benefit every recipient; instead employment counselors have discretion as to which tools to use with each recipient.
- **A redesigned MFIP orientation.** The redesigned orientation is the first interaction between MFIP recipients and employment counselors. Designed to occur in a one-on-one or small group, the new orientation aims to set a collaborative tone, introduce the goal-setting process, and reduce recipients’ stress by streamlining paperwork.

Key Steps in the LLI Approach

- 1) *Conduct assessments to learn about recipients’ strengths and weakness;*
- 2) *Guide recipients toward building goals that are a good fit through coaching from employment counselors that is collaborative rather than directive;*
- 3) *Work with recipients to create an action plan to achieve goals;*
- 4) *Support recipients as they do individual tasks; and*
- 5) *Review progress on task achievement and setting new goals.*

Because the LLI is a new approach, Ramsey County piloted it with two of the five employment service providers (the county’s Workforce Solutions and Goodwill—Easter Seals) over a ten-month period between February and November 2016. During this time staff were trained in cohorts and LLI tools were tested and modified based on staff feedback, with full implementation occurring in November 2016.

Implementation Findings and Lessons

This report uses data collected through staff interviews, a survey of employment counselors, and a recipient focus group to document LLI early implementation, including a 10 month pilot period and eight months of full implementation (from November 2016 to July 2017). It presents operational lessons intended to inform policymakers and program administrators interested in exploring a goal-oriented coaching intervention. Key implementation findings are:

- *Staff have a favorable view of the LLI, including the coaching and redesigned orientation.*

Interviews and the survey showed that staff generally have favorable opinions of the LLI. Most employment counselors reported that the goal-oriented approach is a better way to work with MFIP recipients compared with an approach where employment counselors were more directive in determining appropriate activities for recipients to attend (reported by 92 percent of employment counselors responding to the survey) and that coaching tools are easy to use (85 percent). All staff survey respondents agreed that coaching helps recipients set goals and incremental tasks based on their individual skillsets and most (77 percent) reported that coaching helps recipients develop strategies that will move them into employment. While some of recipients' incremental goals under the LLI were not specifically focused on job search activities per se, staff reported recipients were taking steps to resolve issues they viewed as necessary for employment (e.g., goals related to obtaining stable housing or regular childcare would improve the likelihood of employment in the long run).

Most employment counselors reported that the LLI orientation was an improvement over the standard MFIP orientation and that it helped recipients develop employment-related goals. Based on interviews conducted for this study, the one-on-one or small group setting allows for more tailored discussions of service options. Moreover, recipients are more likely to participate in the discussions.

- *Implementing the LLI approach involved significant time and training.*

Ramsey County program administrators invested considerable resources to develop the LLI and train staff. Specifically, Ramsey County MFIP administrators:

- Contracted with several expert consultants to assist in developing the approach, a step deemed critical by program administrators given that it was a new approach for a TANF program and specialized knowledge was required to develop tools and processes,
- Used the expert consultants to provide multi-day training to staff in cohorts, with each cohort practicing coaching and using the tools for several months before the intervention was formally implemented and
- Worked with expert consultants to refine the coaching techniques and tools following each cohort training based on feedback from the employment counselors.

The employment counselors reported that it took time, practice, and ongoing guidance to learn to use the new approach and tools and ultimately change how they interacted with recipients. Moreover, in the staff interviews conducted for this study, counselors also reported a need for ongoing support or refresher training, and an opportunity to discuss areas where they were experiencing difficulties. The experience of Ramsey County indicates that this type of training, including feedback from staff, is likely needed to bring the change to staff practices needed for goal-oriented coaching.

- *Caseload size and other responsibilities are important considerations when implementing an LLI-type approach.*

Counselors consistently reported that the goal-oriented approach required more time with recipients than a more directive approach and this could be difficult given their caseload size. Ramsey County administrators integrated the LLI into existing MFIP employment services, and thus most tools and procedures were added to, rather than replaced, existing forms and processes. In addition, the one-on-one or small group orientation format added to the counselors' workload.

Recognizing the time commitment associated with coaching, as designed, the LLI trainings stressed that employment counselors are not expected to use all LLI tools with every recipient, as some tools may be unnecessary for some (e.g., recipients who are already working may benefit less from the goal-setting tools and may also be less receptive to completing them). The ability of staff to use their discretion in the application of the LLI tools was particularly important when staff faced high caseloads. Ramsey County has considered developing a set of core tools – while making other tools optional – to help staff prioritize their time with recipients. Providing guidance on which tools to prioritize, and in which situations, appears to be an important next step in the development of the approach. Some employment counselors also reported that the one-on-one orientation format could be difficult to operationalize, and that the small group setting also worked well to set the collaborative goal-oriented tone envisioned by LLI.

- *Employment counselors varied in using all tools consistently. Staff used the initial assessment tool and the tools to set and track goals nearly universally, while they experienced more difficulty with the executive skills-oriented ones.*

Employment counselors reported consistent use of several LLI tools, particularly the tool used to assess areas of need and set goals and the tool used to establish incremental tasks and track progress. They reported less frequent and inconsistent use of the set of tools related to executive skills. Counselors who rarely used executive skills tools reported that they did not feel confident in how to correctly use them or tie them to the goal-setting process, or did not have time to use them. While employment counselors do participate in regular peer- and supervisor-led meetings to practice coaching approaches and review challenging recipient scenarios, some counselors reported that support was insufficient, particularly with troubleshooting executive skills assessment and goal development. Additional supports for counselors – including regular training or support by subject matter experts or guidebooks with examples or scenarios for incorporating the LLI tools into the goal-setting process – may help them feel more comfortable working with recipients to develop executive skills-informed goals.

- *Appropriate staff selection is important for implementing the LLI approach.*

While staff training is important, MFIP program managers in Ramsey County reported that staff with certain types of skills were able to adopt the approach more easily than others. As designed, staff reported that the LLI approach should generally focus on identifying incremental tasks associated with recipient-identified goals, rather than counselor-directed activities. The employment counselors that adopted the approach more easily often came from social work or

coaching backgrounds and were more flexible in their approach to recipients. In contrast, program managers report that some employment counselors do not adequately use the tools to engage recipients in goal-setting and attainment. Managers note that these employment counselors are generally more prescriptive in their overall approach, they often have extensive experience working in TANF programs focused on the WPR, and tend to be less comfortable with the recipient-driven emphasis under the LLI.

- *It is important to balance recipient-driven goal development with a focus on employment outcomes in a mandatory employment services program.*

The degree to which goal-oriented coaching can align with core WPR activities will have implications for its implementation in other TANF settings. Using a goal-oriented process within a TANF program requires a balance between goals and tasks that focus on addressing barriers and those focused on moving to employment. While the ultimate goal of the LLI is employment and improved economic well-being, in line with the TANF program goals, short-term tasks often address needs and barriers in a wide range of domains (e.g. housing, mental health, children's needs) that may not count towards the WPR (which counts employment-focused activities such as job search and readiness activities, work experience, vocational training). The implementation of the LLI benefitted from Minnesota and Ramsey County guidance issued prior to and independent of the LLI, which allowed more flexibility in the types of activities recipients could attend. MFIP program managers and counselors reported that it would have been difficult to implement the LLI as intended without this flexibility.

Conclusion

Ramsey County made a substantial investment in the development and implementation of the LLI, a goal-oriented approach to improve employment outcomes for MFIP recipients. The program was well-implemented in most areas and viewed favorably by staff. As it is a new approach, particularly within a TANF program, Ramsey County administrators continue to make refinements and adjustments to the LLI. Additional research is needed to determine actual program impacts and the extent to which the approach results in improved employment and earnings and family well-being.

1. Introduction

Established by the Personal Responsibility and Work Opportunity Reconciliation Act of 1996, the Temporary Assistance for Needy Families (TANF) program is intended to foster economic security and stability for low-income families with children. TANF funds a wide range of services that address the program's four broad purposes, and those services include monthly cash assistance payments to low-income families with children.² Balancing the provision of cash assistance with individual responsibility, the TANF program requires recipients to participate in a specified set of work activities (e.g., job search and readiness activities, work experience, vocational training) as a condition of benefit receipt.

Even before the enactment of TANF, policymakers implemented and researchers evaluated services designed to improve cash assistance recipients' employment outcomes and reduce dependency. However, programs to date have had mixed results, including those operating prior to TANF. Many recipients struggle to find and keep jobs and families remain poor despite the assistance provided (Hamilton and Hendra, 2015).

This report describes the early implementation of a new "goal-oriented" approach that was incorporated in the existing TANF program in Ramsey County, Minnesota. This approach applies new understandings from psychology and brain development science to help cash assistance recipients improve their employment outcomes. Goal-oriented approaches (as we refer to them in this report) are based on research suggesting that the chronic stress that people living in poverty can experience hinders the development of planning, decision-making and organizational skills, broadly defined as executive skills, and also sometimes known as self-regulation skills (Blair and Raver, 2016).³ These skills are viewed as critical for adult success in goal attainment related to employment and other areas of life. The goal-oriented approach seeks to improve recipients' executive skills and behaviors that can help them to achieve their goals (Anderson, Kauff, and Cavadel 2017).

A program that takes such a goal-oriented approach consists of the following:

- Conducting assessments to **learn** about a person's strengths and weakness;
- Establishing **goals** that are a good fit for that person through coaching from program staff that is collaborative rather than directive;
- Setting **plans** to achieve goals that include a focus on planning, organization, and time management;
- Supporting the person as they **do** individual tasks; and
- **Reviewing** progress on achieving tasks and setting new goals.

² The four purposes of TANF are to: (1) provide assistance to needy families so that children may be cared for in their own homes or in the homes of relatives; (2) end the dependence of needy parents on government benefits by promoting job preparation, work, and marriage; (3) prevent and reduce the incidence of out-of-wedlock pregnancies; and (4) encourage the formation and maintenance of two-parent families.

³ Cavadel et al. (2017) define *executive skills* as "a set of cognitive skills that helps people regulate and control their actions, particularly intentional actions of goal-setting and pursuit."

Starting in 2015 and working with a team of experts, Ramsey County (which includes the city of St. Paul and other urban and suburban areas) designed and implemented the Lifelong Learning Initiative (LLI) to incorporate a goal-oriented coaching approach into its services provided to cash assistance recipients of the Minnesota Family Investment Program (MFIP), the state's TANF program. The LLI integrates a redesigned program orientation, recipient assessments and goal-setting, staff monitoring tools, and coaching methods into its existing MFIP employment services. Ramsey County is one of the first TANF programs to integrate goal-setting into its employment services. Many of the programs using a goal-oriented approach serve low-income individuals but operate *outside* the TANF system, in settings where participation in program services is voluntary.⁴ Ramsey County's approach incorporates goal achievement principles from these programs operating in other settings, particularly identifying and achieving incremental, smaller goals that build towards better employment outcomes.

Recognizing the interest in goal-oriented approaches to improving employment outcomes for low-income populations, the Office of Planning, Research, and Evaluation (OPRE), within the Administration for Children and Families at the U.S. Department of Health and Human Services, sponsored an implementation study of the LLI. Conducted by Abt Associates, this study is part of a larger evaluation—the Job Search Assistance (JSA) Strategies Evaluation, also sponsored by OPRE—to examine job search assistance strategies for TANF applicants and recipients.⁵ As shown in Exhibit 1.1, the JSA Strategies Evaluation is one of three ongoing OPRE projects evaluating goal-oriented approaches.

⁴ The Mobility Mentoring Program created by the Crittenton Women's Union in Boston (MA) and the New Haven MOMS Partnership in New Haven (CT) are examples. See Pavetti (2014), Cavadel et al. (2017), and Babcock (2014) for more information.

⁵ More information on the Job Search Assistance Strategies Evaluation can be found on ACF's Office of Planning, Research, and Evaluation website: <https://www.acf.hhs.gov/opre/research/project/job-search-assistance-evaluation>.

Exhibit 1-1: OPRE's Projects Related to Coaching and Goal-oriented Approaches to Achieving Self-sufficiency

Project	Goal-Oriented Adult Learning in Self-Sufficiency (GOALS), 2014-2018	Evaluation of Employment Coaching for TANF and Related Populations, 2016-2021	Job Search Assistance (JSA) Strategies Evaluation, 2013-2019
Description	Exploring how emerging insights from psychology can strengthen programs aimed at helping families achieve self-sufficiency	Evaluating up to five interventions that apply coaching practices to promote job entry and retention among TANF recipients and other low-income individuals	Genesee and Wayne (non-Detroit) Counties in Michigan are testing goal-oriented enhancements to their current programs: <ul style="list-style-type: none"> – Goal-setting and staff monitoring tools – A revised orientation – Training for treatment group case managers on how to coach recipients and use goal achievement tools Implementation study of similar goal-oriented approach in Ramsey County, Minnesota.
Publications (available and forthcoming)	<ul style="list-style-type: none"> • Improving Outcomes Among Employment Program Participants Through Goal Attainment: A Conceptual Framework • Self-Regulation and Goal Attainment: A New Perspective for Employment Programs • New Perspective on Practice: A Guide to Measuring Self-Regulation and Goal-Related Outcomes in Employment Programs • Using the Science about Self-Regulation to Improve Employment Outcomes for TANF Families (Forthcoming) • Final Report (Forthcoming) 	<ul style="list-style-type: none"> • Measuring Self-Regulation Skills In Evaluations Of Employment Programs For Low-Income Populations: Challenges And Recommendations (Expected 2018-9) • Focusing On Self-Regulation Skills May Improve Employment Programs For Low-Income Populations: Coaching And Other Interventions (Expected 2018-9) • Impact and Implementation findings reports (Expected 2021) 	<ul style="list-style-type: none"> • Implementation of a Goal-Oriented Approach to Providing Employment Services to Cash Assistance Recipients: The Lifelong Learning Initiative in Ramsey County, Minnesota • Michigan Implementation and impact report (Expected 2019)

Based on interviews with staff, an on-line staff survey, and a focus group of MFIP recipients, this report documents the design and implementation of Ramsey County's Lifelong Learning Initiative, including staff perceptions of its goal-oriented approach. With a focus on informing policymakers and program administrators interested in this approach, the report concludes with key findings and lessons from the implementation of the program.

The remainder of this report is organized as follows:

- Chapter 2 describes the programmatic and research context for the LLI, including how the initiative was developed in Ramsey County. The chapter also describes the JSA evaluation and the evaluation methods used for this report.
- Chapter 3 describes the key elements of the LLI, implementation of the program, and staff perceptions of the approach. The chapter also describes the modifications that Ramsey County was considering at the time of data collection for this report.
- Chapter 4 presents operational lessons, based on implementation findings, intended to inform policymakers and program administrators interested in exploring a goal-oriented coaching intervention.
- Appendix A displays all of the LLI tools used to support the goal-oriented approach.
- Appendix B provides the PowerPoint presentation that counselors use in the LLI.

2. Program Context, Development of the LLI, and Evaluation

This chapter provides the program and research context for the LLI, including how the initiative was developed in Ramsey County, and the evaluation design for study, including the JSA evaluation. First, the chapter describes the state’s TANF program, specifically how it operates in Ramsey County. Then it provides the research context for the goal-oriented approach and describes the development of the approach for employment programs broadly and for MFIP in Ramsey County specifically. The chapter concludes with a description of the JSA evaluation, including the data sources used for this report.

2.1 Program Context: TANF in Minnesota and Ramsey County

In Minnesota, families with minor children and pregnant women who meet income and asset requirements are eligible to apply for monthly cash and food assistance through the Minnesota Family Investment Program, administered by the Minnesota Department of Human Services (DHS).⁶ Though DHS oversees it, MFIP is administered by the counties, and each of Minnesota’s 56 counties has flexibility in operating the program within the state’s basic guidelines. When most families apply for MFIP, they first participate in the Diversionary Work Program, a four-month program that provides supports (e.g., assistance with rent or utilities) and job search services that aim to help applicants find employment. Those still unemployed after four months are referred to MFIP.

Federal rules require Minnesota to engage a certain share of families with a work-eligible individual receiving cash assistance through MFIP in work-related activities to meet the federally defined work participation rate (WPR), and Minnesota has historically exceeded the target rate.⁷ There are several core activities, which can be counted for all hours of participation: unsubsidized and subsidized employment; work experience; on-the-job training; job search and job readiness assistance (limited to 12 weeks); community service programs; vocational educational training, for up to 12 months; and providing child care services to an individual who is participating in a community service program. The WPR calculates the share of TANF recipients participating in countable work activities for at least 30 hours a week (20 hours a week for single parents with one or more children under 6). MFIP imposes sanctions for non-

⁶ Minnesota provides food assistance as part of the MFIP program. Food assistance benefits under MFIP are separate from the federally-funded Supplemental Nutrition Assistance Program (SNAP) benefits or the Minnesota Food Assistance Program (MFAP), which assists non-MFIP, non-citizen individuals and families with low incomes to purchase food to better meet their nutritional needs.

⁷ By federal statute, the target WPR is 50 percent. The target is lower, however, for states that have experienced caseload decreases or invested state maintenance-of-effort (MOE) dollars above the required amount. Many states, including Minnesota, have a lower effective WPR target. For example, in Federal Fiscal Year 2016, Minnesota had an effective WPR target of 32 percent and achieved a 39 percent WPR (DHHS, 2017). States have the option of allowing recipients to participate in activities that are not federally countable as long as they meet the required rate. States that fail to meet the WPR target are subject to a financial penalty.

participation in work activities and enforces the required five-year limit on federally-funded benefits for most families.

Minnesota has historically met the WPR and, in part because of this success, in 2014, the state issued guidance allowing MFIP recipients in all counties to pursue a broader range of education and training options for up to two years and to allow recipients choice over what employment services they receive, including those that are not core activities. Thus, prior to the implementation of the LLI, Ramsey County followed this state guidance and allowed flexibility in the types of activities MFIP recipients could receive beyond the federally-defined core activities (Probert Fagundes, 2014).

2.1.1 MFIP in Ramsey County

Ramsey County is the second largest county in Minnesota, with a population of approximately 540,000 (U.S. Census Bureau, 2017) and an average annual MFIP caseload of approximately 5,000.⁸ The county serves primarily urban areas of St. Paul, as well as some surrounding suburbs.

As shown in Exhibit 2-1, the MFIP caseload in Ramsey County is relatively diverse, with low levels of education. About half of recipients describe themselves as African American or Black (55 percent); of them, Ramsey County administrators estimate that a sizable share (about 20 percent) is Somali. About one-quarter of the MFIP caseload is White (22 percent). About 15 percent are Asian; of them, Ramsey County administrators estimate that many are Hmong and Karen.⁹

Not surprisingly for those receiving cash assistance, MFIP recipients in Ramsey County generally have low levels of education; most (88 percent) have no education beyond high school, and 38 percent do not have a high school diploma or equivalent. The average MFIP recipient is age 33 and has two children.

⁸ This is the average annual MFIP caseload as reflected in Minnesota Department of Human Services Financial Assistance Data Management System as of August 2017.

⁹ Hmong people are from China and Southeast Asia, most notably from Thailand, Vietnam and Laos. The Karen people are an ethnic group from Southeast Asia, primarily Myanmar.

Exhibit 2-1: Demographic Characteristics of Ramsey County MFIP Caseload

Characteristic	MFIP Caseload
Average Age (years)	32.6
Race	
Asian	15.4%
Black or African American	55.0%
White	22.3%
American Indian or Alaska Native	3.1%
Mixed Race	3.5%
Number of Parents on Case	
1 Parent	76.2%
2 Parents	23.1%
Current Education	
Less than a High School Diploma	37.5%
High School Diploma or Equivalent	50.4%
Some Education beyond High School	12.0%
Average Number of Children ^a	2.13
Sample Size	4,583

Source: Minnesota Department of Human Services Financial Assistance Data Management System (MAXIS)

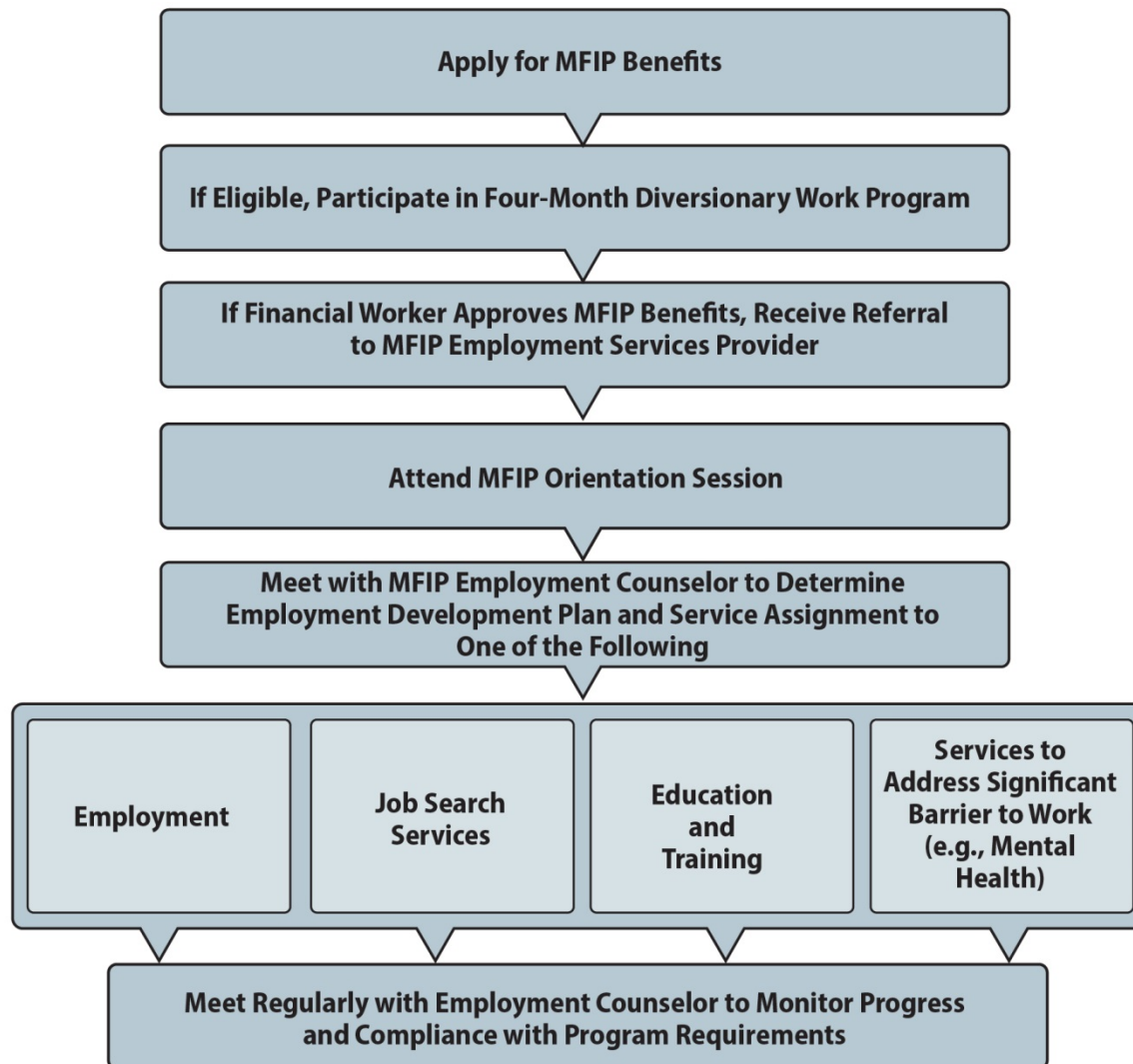
Notes: Demographic characteristics are shown for the MFIP caseload during August 2017 (excluding child only cases); percentages may not sum to 100 due to missing data and rounding.

^a Sample size for this variable is 5,059 recipients because it includes some parents who were determined ineligible for cash assistance.

2.1.2 MFIP Employment Services in Ramsey County

Administered by the Ramsey County Department of Workforce Solutions, MFIP employment services are provided by the department itself or by one of five contracted vendors: Goodwill–Easter Seals, Employment Action Center, HIRED, American Indian Family Center, and Hmong American Partnership. Although they are given some flexibility in how they deliver services, all employment service providers offer a similar set of services.

Exhibit 2-2 provides an overview of steps through the MFIP program in Ramsey County. As shown, all applicants who are approved for TANF benefits are assigned to an employment services provider, primarily based on proximity to their home or their preference. They first attend an MFIP orientation session at the provider that explains the services offered, participation requirements, and expectations. Then each benefit recipient is assigned to an employment counselor. Employment counselors work one-on-one with recipients to develop an Employment Development Plan. They meet regularly thereafter, typically weekly or biweekly, depending on the recipient's needs and circumstances, to monitor progress and compliance with MFIP requirements.

Exhibit 2-2: Key Steps in MFIP Program

The Employment Development Plan documents employment services in which the MFIP recipient is required to participate; there is no specified sequence of services. However, based on their needs and circumstances, MFIP recipients generally participate in the following activities:

- Working full- or part-time in a job (but at wages and/or with hours where they do not earn enough to be ineligible for MFIP).
- Participating in job search activities, such as group job search classes, resume writing, interview preparation, and one-on-one assistance.
- Attending education and training courses, including vocational training and GED preparation.

- Participating in activities to address barriers to work (e.g., significant physical or mental health issues or caring for an ill or incapacitated child or adult), such as substance abuse or mental health counseling.¹⁰

Recipients also can transition among activities as their circumstances change (e.g., they complete training and move to job search activities).

As discussed above, when the LLI was being designed and implemented, MFIP in Ramsey County had flexibility from the state in how it could provide employment services to MFIP recipients. That flexibility included allowing MFIP recipients to participate in a wider range of work-related activities, or to participate in activities for different periods of time, than the types of activities and their associated timeframes that count towards the WPR as defined by the TANF regulations. Compared with their earlier MFIP program and prior to the implementation of the LLI, Minnesota and Ramsey County had moved to a more recipient-driven approach to service provision that gave recipients choices over activities they could attend as part of MFIP.

2.2 Development of the Lifelong Learning Initiative

This section begins with a brief review of the literature on the goal-oriented approach, and then discusses the development of the LLI.¹¹

2.2.1 Research Context: The Science Behind the Goal-Oriented Approach

The goal-oriented approach to providing employment services grew out of several bodies of research involving psychology and behavioral science. Goal-setting and attainment have long been studied as important factors in achieving success in a range of settings and with different populations (Burnett et al., 2013; Cavadel et al., 2017). Evidence suggests that specific behavioral skills (known as executive function or self-regulation, collectively) are needed to set, pursue, and achieve personal goals, including employment-related goals (Cavadel et al., 2017, Diamond, 2013). These skills include time management, organization, prioritization, flexibility, emotional control, and stress tolerance. In addition, research indicates that all people have strengths and weaknesses in these areas that are malleable over time (Blair and Raver, 2015).

Research suggests that poverty and associated environmental conditions can hinder the development and use of the executive skills needed for goal-setting and attainment. In particular, adverse childhood experiences such as family instability, food scarcity, and/or exposure to abuse or violence can disrupt the development of planning and goal achievement-related skills (Blair and Raver, 2016). Individuals living in poverty also are likely to experience stress related to scarcity of resources that may impede utilization of executive skills. That is, for individuals living with limited financial resources, many tasks in everyday life (e.g., navigating transportation, securing childcare) can be stressful and may tax cognitive bandwidth. This in turn limits the capacity for other cognitive skills such as the ability to analyze and solve problems, make good decisions, and impose self-control (Muraven and Baumeister, 2000).

¹⁰ These services are provided through the state's Family Stabilization Services program using state MOE funds that not subject to the WPR.

¹¹ Much of this literature review is drawn from an OPRE-sponsored literature review on goal-oriented approaches for employment programs (see discussion in Section 1.2.2 and Cavadel et al., 2017).

Poverty also leads people to focus more on pressing short-term financial stresses and needs at the expense of longer-term goals (Mullainathan and Shafir, 2013).

Interventions using a goal-oriented framework in a range of settings such as schools and non-profit organizations have succeeded in improving academic performance, educational attainment, and health (Duckworth et al., 2014; Oettingen et al., 2015). Such interventions encourage and support goal-setting by breaking big goals into smaller steps; and with repeated practice, they help build skills needed for future goal-setting and attainment (Oettingen et al., 2001; Schunk, 2001). Breaking a long-term goal down into smaller steps is also expected to increase motivation by providing a person evidence of frequent, small goal achievement successes (Cavadel et al., 2017). Related work shows that developing goals with a strong “goodness of fit” to a person’s preferences, skills, and available support resources are important to success in achieving intended goals (Dawson and Guare, 2016).

2.2.2 Development of the Goal-Oriented Approach for Employment Programs

Because of its success in other settings, a number of academics and program administrators explored whether the goal-oriented approach was a strategy that could be helpful for low-income populations that face multiple barriers to employment, including TANF recipients. LaDonna Pavetti, of the Center on Budget and Policy Priorities, initiated and led much of the work in this area, bringing together multi-disciplinary researchers and practitioners. These have included Richard Guare, of the Center for Learning and Attention Disorders at Seacoast Mental Health Center, and Michelle Derr of Mathematica Policy Research¹²(see Pavetti, 2014). OPRE supported the effort by funding a project, conducted by Mathematica Policy Research, to synthesize the literature related to goal-setting and attainment, with a particular focus on the identification of skills needed to enhance low-income adults’ attainment of employment-related goals. This project, called Goal-Oriented Adult Learning in Self-Sufficient (GOALS) also explored options for integrating approaches that address self-regulation and goal-setting into employment programs for low-income adults (see Cavadel et al., 2017).

The efforts resulted in several principles and steps that are important in implementing a goal-oriented approach. The outer circle of Exhibit 2-3 illustrates key principles driving the goal-oriented approach:

- ***Coaching to guide goal-setting and attainment.*** Staff who facilitate goal-setting and achievement are a critical element. Such staff work with the participant in setting goals that are challenging, but also achievable and meaningful to that person (known as goodness of fit). Staff also help participants recognize their individual strengths and weakness in goal-oriented behaviors, and identify strategies for using strengths and addressing weaknesses. Assessments provide information that coach and participant need to develop a detailed plan that serves as a roadmap for reaching goals. The approach emphasizes “scaffolding”, in

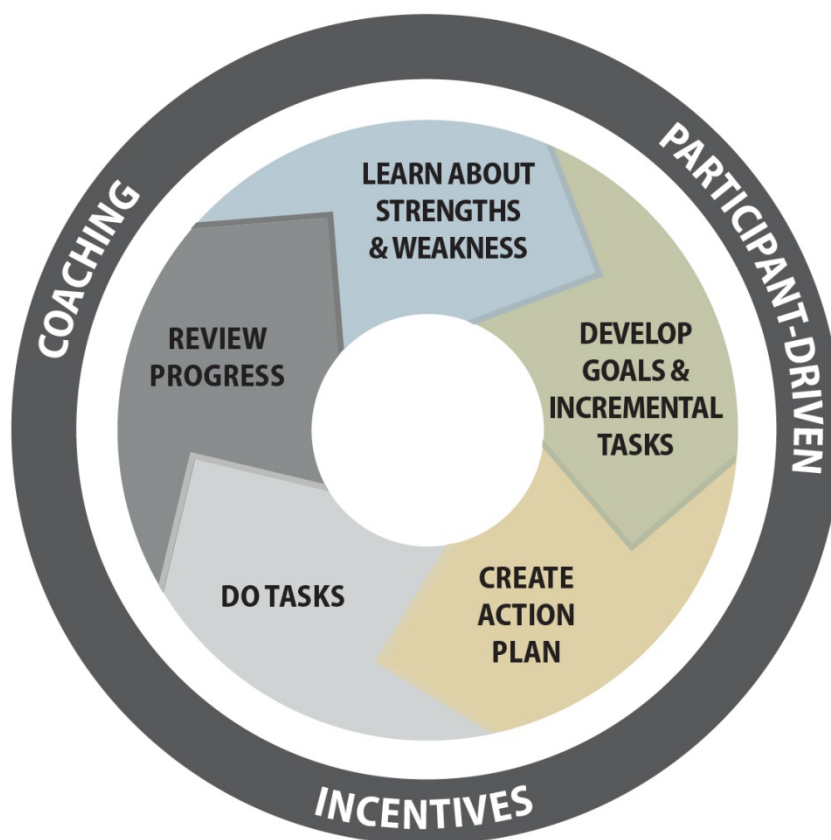
¹² Michelle Derr is also a member of the JSA Evaluation study team (Mathematica Policy Research is a subcontractor to Abt for JSA), but, given her role in the development of the LLI, she was not involved in the evaluation of the Ramsey County LLI.

which staff assist participants in breaking tasks into small steps, and provide as much support as needed to complete the task.

- **Development of participant-directed goals.** Staff develop a collaborative relationship with participants that focuses on individual strengths, areas of need, and available resources. Staff help guide participants in the goal-setting process, but they are not directive.
- **Incentives to motivate.** Non-monetary and monetary incentives provide additional motivation and increase participants' persistence toward task completion. Incentives also serve to increase the perceived benefit of the task.

The key principles guiding the approach are applied to defined steps to set and attain goals. The inner circle of Exhibit 2-3 illustrates these steps: (1) **learn** about the participant's strengths and weaknesses through assessment; (2) set one or more individualized **goals**, with a focus on incremental goals to achieve an overall objective; (3) create an action **plan** to help the participant achieve the goal(s); (4) Support the person as they **do** individual tasks; and (5) **review** together the participant's progress toward goal achievement and develop new goals and tasks based on what was **learned** from this review. As illustrated in Exhibit 2-3, the process is intended to be cyclical; as circumstances change (e.g., goals are met, barriers arise), staff reassess and revisit the participant's needs, and then work together to develop new goals and tasks that move the participant toward their overall objective.

Exhibit 2-3: Key Principles and Steps in the Goal-Oriented Approach



As described below, these goal-oriented principles and steps provided the basis for the development of the LLI in Ramsey County, and Ramsey County program administrators worked to incorporate the principles and steps into their current MFIP program.

2.2.3 Development of the LLI in Ramsey County

In late 2015, leadership of the Ramsey County Department of Workforce Solutions began designing the LLI in order to improve the outcomes of MFIP employment services. Specifically, Ramsey County defined the LLI as “the process of utilizing enhanced coaching methods to guide Employment Services program participants with the identification of their individualized self-sufficiency goals and then leading through the progression of steps for strengthening executive functioning skills in order to achieve those goals (Ramsey County Request for Proposals, 2015).”¹³

Ramsey County’s development and implementation of the goal-oriented approach occurred in phases beginning in 2015, culminating in the enactment of the LLI in early 2016. Prior to the development of the LLI, the following goal-oriented elements were incorporated into the Ramsey County MFIP program at all providers:

- **My Bridge of Strength.** In May 2015, Ramsey County introduced the *My Bridge of Strength* tool to all employment counselors in the county. The tool assesses circumstances across key domains of an MFIP recipient’s life (e.g., housing, dependent care, health, social support, education, employment). Within each domain, the tool includes outcome goals and progressive steps to achieve them (see Appendix A for Bridge of Strength). By allowing employment counselors to develop and prioritize goals based on individual circumstances in the areas that support employment, the *Bridge* creates a recipient-directed framework for service delivery, and it is intended to complement the Employment Development Plan. Employment counselors can use the *Bridge* to assess a recipient’s baseline status in the identified service areas, and track progress within these areas over time.
- **Coaching training.** As a first step in implementing coaching, in July 2015 Ramsey County provided coaching training for all employment service provider staff in the county. Built on some previous training the county had conducted on motivational interviewing, the coaching training instructed staff on how to shift from a directive-style of working with recipients (i.e., defining activities on behalf of recipients) to a recipient-driven approach. The new style uses open-ended questions to guide recipients in developing their own employment-related and other goals, as well as the process for achieving them. All service providers were expected to host bi-monthly staff meetings to practice these new techniques.

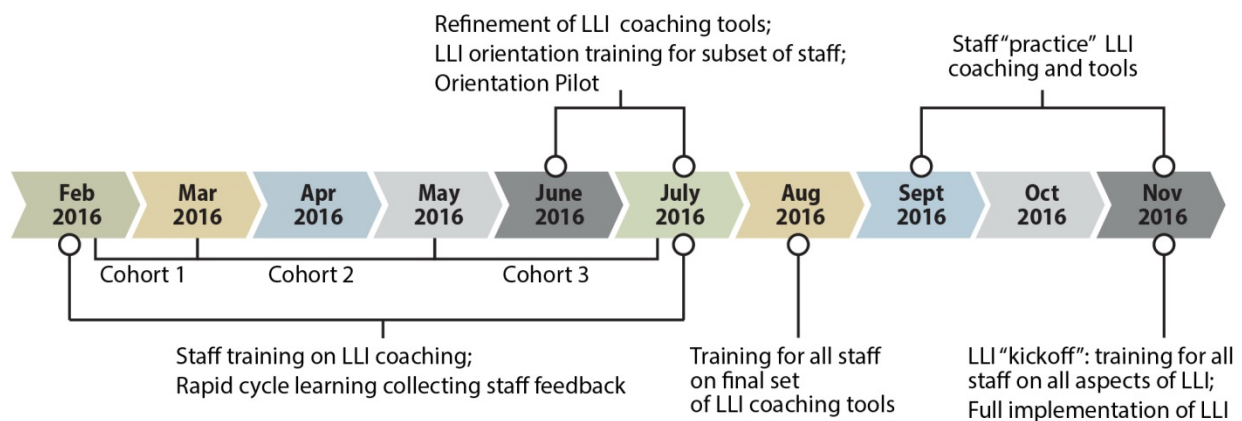
Building on these initial goal-oriented elements, in May 2015 Ramsey County contracted with Mathematica Policy Research, Dr. Richard Guare, and Global Learning Partners to develop the LLI’s coaching approach, tools, and redesigned program orientation and to train staff. The LLI

¹³ Ramsey County Request for Proposals (March 25, 2015). Retrieved from <http://agenda-suite.com:8080/agenda/ramsey/621/TeXJIFJGUCBGSU5BTC5wZGY=/12/n/4170.doc>

was expected to build on the work to date by focusing specifically on an approach to address executive skills.

Because it was designed as a pilot, the LLI was implemented by two of the Ramsey County employment service providers, primarily selected based on their interest in the approach: Workforce Solutions and Goodwill–Easter Seals. Between February and July 2016, Ramsey County divided the employment counselors at both providers into three cohorts and trained them on the LLI coaching approach and supporting tools. The Mathematica team provided this training to a total of 25 staff (employment counselors, supervisors, and managers). Exhibit 2-4 illustrates the timeline for the LLI implementation activities, including training.

Exhibit 2-4: LLI Training and Implementation Timeline



For each cohort, the LLI coaching training covered executive skills development (e.g., what executive skills are, the brain science behind executive skills development, how to work with recipients to address and build executive skills) with an emphasis on the importance of ensuring a goal's goodness of fit with a recipient's abilities, interests, and needs. The training encouraged employment counselors to work with recipients to identify executive skills strengths and weaknesses to set goals, and to target and improve identified weaknesses. The training also described several tools developed as part of the LLI (described in detail in Chapter 3), but did not prescribe when or with whom to use the tools.

Each cohort of employment counselors participated in a six week pilot of the approach, providing program developers with feedback on the coaching techniques and tools. The purpose of this "rapid-cycle learning" process was to assess implementation experiences based on staff feedback including ease of use, what aspects of the tools worked and which did not, and recipients' reaction to the tools and overall approach. From that feedback, the Mathematica team, in consultation with Ramsey County program administrators, refined the tools, but did not alter the overall approach or content of the training. In August 2016, the Mathematica team conducted a 1½-day training on the finalized LLI approach and tools for all three cohorts of staff at Workforce Solutions and Goodwill—Easter Seals and new employees hired in the interim.

Concurrent with the training on LLI coaching and tools, the Mathematica team developed the LLI orientation, with input from Ramsey County administrators and staff. This orientation was

designed to replace the existing MFIP orientation and introduce the goal-setting approach, as well as introduce the collaborative relationship between counselors and MFIP recipients envisioned by the LLI. In June 2016, the Mathematica team trained a subset of employment counselors from Goodwill–Easter Seals and Workforce Solutions to implement the new orientation. The counselors delivered the new orientation for six weeks then submitted feedback as part of the rapid cycle learning, and the orientation was finalized.

In November 2016, Ramsey County led a training that served as the official kickoff for the full LLI, after which both service providers were expected to implement all aspects of the LLI. The November meeting included training for all staff on the revised orientation, as well as a refresher on the LLI tools.

2.3 JSA Strategies Evaluation and Data Sources for This Report

Abt Associates is conducting the LLI implementation study as part of the Job Search Assistance (JSA) Strategies Evaluation. JSA is a four-year evaluation that is examining the effectiveness of different approaches to providing job search assistance to help TANF applicants and recipients transition to work. The JSA evaluation includes five sites:

- In two sites—Ramsey County and Westchester County, New York—the JSA evaluation includes implementation studies documenting operation of a promising approach, including lessons for program administrators.
- In the other three sites, in addition to implementation studies, JSA is conducting impact studies that randomly assign TANF applicants and recipients to contrasting JSA approaches and then compares the programs' relative effectiveness in terms of employment, earnings, and benefit receipt. These sites are Genesee and Wayne County, Michigan; New York City; and Sacramento County, California. The research team will produce a separate report for each study site.

This implementation report on the Lifelong Learning Initiative in Ramsey County is the first report produced as part of the JSA Evaluation. It focuses on development and operation of the LLI from its start in February 2016 through March 2017. Because the LLI was not fully implemented until November 2016, the LLI was in its early stages of operation during the study period for this report.

The data sources for the study are the following:

- **Site visits.** The Abt research team made three visits to the Workforce Solutions and Goodwill-Easter Seals sites, in March 2015 (before the LLI was implemented), July 2016, and March 2017. The goal of the visits was to document the implementation of the LLI tools and coaching approach, as well as changes made to the program over time, including the addition of a redesigned program orientation, assessment and goal-setting process, provision of employment services, ongoing monitoring and review of goals, and successes and challenges. During each visit, the Abt team interviewed program managers and employment counselors at each service provider. The Abt team also attended the county-wide coaching training session in July 2015 prior to the development of the LLI and the LLI coaching and tools training session for the second cohort in March 2016.

- **Staff survey.** The Abt team conducted an on-line survey of the employment counselors at Workforce Solutions and Goodwill–Easter Seals in July 2017. The survey had an 81 percent response rate, with 13 of the 16 employment counselors responding, and did not include supervisors or managers. The survey collected data on the nature and frequency of counselors’ use of the LLI and its tools and their perceptions of the goal-oriented approach.
- **Focus group.** The March 2017 site visit included a focus group with 11 MFIP recipients from the employment service providers operating the LLI.
- **Monitoring calls.** During the LLI development and rapid-cycle learning period, the Abt team participated in monthly conference calls with both Ramsey County managers and the Mathematica team developing the LLI to discuss the status of implementation and adjustments being made to the program.
- **Program documents.** The Abt team obtained and reviewed training materials, revisions to the LLI tools, and feedback from the rapid-cycle learning process.

The remaining chapters present the findings from the LLI implementation study.

3. Key Elements and Implementation of the LLI

This chapter describes the design and implementation of the Lifelong Learning Initiative in Ramsey County, consisting of the redesigned employment services orientation (known as the LLI orientation), goal-oriented coaching approach, and coaching tools. This chapter first describes design of the LLI program and then turns to how it was implemented during the early stages of LLI operation. Among the data sources described in Chapter 2, key are staff interviews (program managers, employment counselors) and a staff survey (counselors only).

Given that the LLI program is still new (fully implemented in November 2016 with data collection for the study occurring through July 2017) and still undergoing adjustments and enhancements, this chapter concludes with a discussion of additional components that Ramsey County is considering based on its initial operational experiences.

3.1 Key Elements of the LLI Program

As discussed in Chapter 2, Ramsey County and its subcontractor Mathematica Policy Research developed the LLI to promote employment-focused goal achievement. The goal-oriented approach aims to help cash assistance recipients to set longer-term employment goals and shorter-term incremental goals that recognize their executive skills strengths and areas for improvement and then break goals down into small achievable steps or tasks. The LLI also aims to help recipients develop their executive skills—that is, organization, planning, and time management—which are recognized as important skills for goal-setting and attainment.

The LLI begins with a redesigned orientation. Next, recipients meet individually with their employment counselor, which marks the beginning of the coaching relationship. The goal-oriented coaching continues at regular intervals throughout the recipient's time on MFIP. To aid staff in their work with recipients, the LLI includes a number of tools. These components are described below.

3.1.1 LLI Orientation

The LLI orientation is the first interaction between MFIP recipients and employment counselors. Its designers intend it to set the tone for a new kind of collaborative relationship between them and to introduce the goal-setting process. The LLI orientation uses a different approach than the standard MFIP orientation, which according to Ramsey County staff, focused on a basic overview of MFIP requirements and services. Instead, the LLI orientation focuses on presenting MFIP as an opportunity not a requirement; identifying personal goals and mutual expectations; and clearly defining next steps in the program. Its designers also aimed to reduce recipients' stress and cognitive overload by simplifying the paperwork they had to complete in the orientation. Finally, the designers specified that the orientation be conducted in a small-group or one-on-one setting, to facilitate and individualize this initial interaction.

There are four elements in the LLI orientation:

- **Overview of MFIP services and goal-oriented coaching.** The orientation begins with introductions between the employment counselor leading the session and the recipients. Next the counselor offers an overview of services available to MFIP recipients, which include

cash and food assistance, child care, and employment services. The recipient discusses any previous experiences with MFIP, and the counselor outlines the new goal-focused coaching approach.

- **Personal focus and goals.** Next, the orientation aims to help recipients start thinking about their own goals. As part of the presentation, the designers developed a slide (called *Personal Focus*) to help the employment counselor facilitate this part of the orientation. The employer counselor asks MFIP recipients to highlight which of several area(s) of their life are most important and call for their attention at the moment: family stability, well-being, education, financial and legal, and employment. Using the areas of personal focus identified by the recipients, the counselor asks them to describe where they want to be, where they are now, and what effort and support it will take to achieve their goal. The counselor encourages the recipients to include specific timeframes for their goals.
- **MFIP opportunity and expectations.** Then, recipients are encouraged to think about the supports they will need to achieve their goals (e.g., education and training opportunities, support services, programs for people with a criminal background, employment counseling). This is an opportunity for the employment counselor to explain not just the services available but the mutual expectations set under LLI: for MFIP recipients, to participate in coaching sessions and complete identified tasks; for counselors, to help recipients plan and set goals and tasks.
- **Next steps and required paperwork.** Finally, the orientation is designed to help recipients start thinking about short-term goals and tasks needed to accomplish those goals. The counselor distributes and helps the recipients complete the first *My Task-Plan-Do-Review* worksheet, as well as forms required for MFIP.

Under LLI, staff at Workforce Solutions and Goodwill–Easter Seals deliver the orientation in a small-group or one-on-one setting, using a PowerPoint presentation (see Appendix B for the slides). While employment counselors at Goodwill–Easter Seals had already been conducting the orientations one-on-one prior to LLI, Workforce Solutions case aides (who provided general support to all staff in the office) had previously held the orientation in larger groups of up to 30 individuals. For the LLI, Workforce Solutions shifted the orientation to employment counselor-led sessions in a small group or one-on-one setting to individualize that initial interaction.

To further highlight the change in tone, Workforce Solutions also redesigned its reception area to create a positive environment from the outset. This included new paint and artwork, a children’s play area, a greeter who quickly acknowledges and guides each visitor to the office, and an information help desk.

3.1.2 LLI Goal-Oriented Coaching

The LLI coaching framework is built on the *learn-goals-plan-do-review* principles discussed in Chapter 2 (see Exhibit 2-3). The coaching approach under the LLI also includes a focus on determining the recipient’s executive skills strengths and weaknesses, including organization, planning, and time management. The coaching is designed to develop strategies to address areas of strengths and weakness, and reflect these strategies in the goal achievement process. Exhibit 3-1 summarizes the overall objectives of each step in the coaching approach.

The first one-on-one coaching meeting between the recipient and the employment counselor is generally one to two weeks after the orientation and typically last an hour or more. To build on the rapport developed in the orientation, the employment counselor assigned to the recipient is typically the same one who conducted the orientation.

During their initial meetings, the counselor's focus is assessing the recipient's skills, strengths and weaknesses, and barriers and building off the orientation meeting identifying and reviewing long-term employment goals. From there, they work to determine the incremental sub-goals and tasks the recipient needs to achieve in order to accomplish the long-term goals, with a focus on identifying SMART goals—that is goals which are *specific, measurable, attainable, realistic, and timely*.

These meetings result in the recipient's Employment Development Plan, which documents the goals and articulates the services the recipient will receive through the MFIP program. Staff reported that the Employment Development Plan is generally established in one meeting, although for some recipients it takes longer. Once goals and tasks are determined, the counselor meets regularly with the recipient (usually weekly or biweekly), to assess progress and update goals and tasks as necessary.¹⁴

LLI did not change the sanction or non-compliance procedures that exist under MFIP, and recipients can face reduction or termination of their benefits for not following through with assigned activities without good cause.

3.1.3 LLI Coaching Tools

As discussed in Chapter 2, the coaching approach aims to be recipient driven, and the LLI designers created a number of tools to help employment counselors do this. These tools were assessed and refined based on rapid-cycle findings. Exhibit 3-1 lists the LLI tools designed to support each of the LLI coaching objectives (see Appendix A for the tools).

¹⁴ Employment counselors reported that they meet with employed recipients less frequently.

Exhibit 3-1: Steps in LLI Coaching Process: Objectives and Supporting Tools

	OBJECTIVES	TOOLS
LEARN	<ul style="list-style-type: none"> ✓ Recipients are introduced to MFIP ✓ Counselors learn about the recipients ✓ Recipients learn about themselves 	<ul style="list-style-type: none"> • Getting to Know You Questionnaire • Executive Skills Questionnaire • My Profile • My Bridge of Strength
GOAL	<ul style="list-style-type: none"> ✓ Identify a goal with a “good fit” 	<ul style="list-style-type: none"> • My Bridge of Strength • My Pathway
PLAN	<ul style="list-style-type: none"> ✓ Develop an action plan 	<ul style="list-style-type: none"> • My Task-Plan-Do-Review • Strategies for Success Guide
DO	<ul style="list-style-type: none"> ✓ Take action and address what might get in the way 	<ul style="list-style-type: none"> • My Task-Plan-Do-Review • Strategies for Success Guide
REVIEW	<ul style="list-style-type: none"> ✓ Reflect on progress toward the goal 	<ul style="list-style-type: none"> • My Task-Plan-Do-Review • Strategies for Success Guide • My Bridge of Strength

Source: Ramsey County Workforce Solutions LLI Training Materials developed by Mathematica Policy Research.

The LLI program designers intended that not every recipient would need or benefit from every tool. Instead, LLI employment counselors are expected to be able to “use the right tool in the right moment,” according to one program administrator. The LLI tools are as follows:

- My Bridge of Strength.** This was the first LLI coaching tool implemented in Ramsey County. *My Bridge of Strength* is designed to assess how recipients view their current circumstances across 10 domains. Under each domain, recipients identify one of three or four statements best describing their level of security or need. For example, under the dependent care domain, recipients can select a statement ranging from “I have no child care” to “I have reliable child care and a back-up.” The employment counselor works with the recipient in completing the *My Bridge of Strength*, starting with the domain the recipient identifies as most important and working through the others. The counselor uses the information from this tool to understand the recipient’s needs and priorities and then develop aligning goals and action steps, documenting them in the recipient’s Employment Development Plan. The employment counselor is expected to revisit the *My Bridge of Strength* when appropriate to highlight the recipient’s progress and/or to reassess needs and priorities.

My Bridge of Strength Domains

- Housing
 - Dependent Care
 - Transportation
 - Health
 - Children's Behavior
 - Social Support
 - Education
 - Financial Issues
 - Legal Issues
 - Employment
- Getting to Know You Questionnaire.** This form was designed to be used in one of the counselor’s first meetings with the recipient. Its questions help the employment counselor understand the recipient (e.g., “What kinds of jobs have you held in the past? ... What do you think are your three strongest personal qualities? ... Are you in need of any immediate assistance?”). The employment counselor can then use the information to help the

recipient identify long-term goals and potential barriers, and from them develop incremental goals and tasks.

- ***Executive Skills Questionnaire and My Profile.*** LLI designers developed the *Executive Skills Questionnaire* to help recipients identify their executive skills strengths and weaknesses specific to time management, organization, planning/prioritization, response inhibition, flexibility, emotional control, stress tolerance, metacognition, task inhibition, sustained attention, goal-directed persistence, and working memory.¹⁵ *My Profile* lists the recipient's executive skill strengths (the three highest-scored skills) and weaknesses (the three lowest-scored skills) as identified by the *Executive Skills Questionnaire*. *My Profile* is designed to visually help recipients reflect on their executive skills profiles. Counselors are expected to use findings from the *Executive Skills Questionnaire* as part of their goal-setting and review.
- ***My Pathway.*** The *My Pathway* tool is designed to lay out in writing a pathway toward attainment of a long-term goal identified by the recipient. The tool helps the recipient break the long-term goal into shorter-term incremental goals and, under each of these, the day-to-day tasks to attain the goal. Starting with the domain that the *My Bridge of Strength* identified as most important to the recipient (e.g., employment), the employment counselor is trained to prompt the recipient to identify a long-term goal (e.g., obtain a job in the health care field) in that domain. Then the counselor works with the recipient to identify one or incremental goals that will move them toward their long-term goal (e.g., enroll in training program). Finally, the counselor helps the recipient break the incremental goal into tasks necessary for goal-setting and attainment (e.g., identify appropriate type of health care job; identify training programs and determine their start dates, duration, and costs; complete application, and identify child care).
- ***My Task-Plan-Do-Review.*** This tool is designed to help the recipient to plan and accomplish the tasks associated with incremental goals. Starting with a small task identified to achieve the first incremental goal identified on the *My Pathway* tool, the recipient records the steps need to accomplish the task, as well as the timeframe for task completion (e.g., a week or a month). Employment counselors are also trained to encourage recipients to consider their executive skills strengths and weaknesses when developing strategies for completing tasks (e.g., How can your skills help you accomplish these tasks? How might your weaknesses get in the way of accomplishing the tasks?). During subsequent meetings, counselor and recipient review progress made toward task completion and update the tasks as necessary (e.g., if a recipient is having difficulty achieving a short-term goal in the agreed upon timeframe, the counselor will work with the recipient to identify new, smaller sub-tasks).
- ***Strategies for Success Pocket Guide on Executive Skills.*** LLI designers developed the *Pocket Guide* to help counselors provide suggestions to recipients based on their *Executive Skills Questionnaire* results. The *Pocket Guide* includes strategies to help work through challenges in three categories of executive skills: (1) How I Organize Things, (2) How I React to Things, and (3) How I Get Things Done. Ramsey County and its consultants developed the *Pocket Guide* in response to counselor feedback during the rapid cycle learning process that they

¹⁵ The *Executive Skills Questionnaire* worksheet in Appendix A defines each of these executive skills.

needed additional resources in order to identify relevant strategies to help recipients overcome particular challenges. The *Pocket Guide* is a resource that counselors can also give directly to MFIP recipients to work through challenging situations.

As noted, the LLI does not prescribe to counselors an order or frequency of tool use, but there is a suggested sequence to some of the tools. For example, the *My Bridge of Strength* and *Executive Skills Questionnaire* are to be used early on in the coaching relationship to guide goal development (i.e., ensure that goals are a good fit based on the recipient's strengths and weaknesses). The *My Task-Plan-Do-Review* is used on an ongoing basis to monitor goal-setting and attainment.

3.2 Implementation of the LLI

This section describes Ramsey County's experiences implementing the LLI during an early operational period, based on interviews with program administrators, managers, and employer counselors and a survey of employment counselors. As noted later in this chapter, Ramsey County continues to modify the LLI tools and approach.

- ***Staff have a favorable view of the goal-oriented coaching approach.***

Staff interviews and the counselor survey indicated that staff generally have favorable opinions of goal-oriented coaching used by the LLI. As shown in Exhibit 3-2, based on the staff survey, 92 percent of employment counselors reported coaching is a better way to work with MFIP recipients compared with the previous staff-directive approach. Survey respondents also agreed that the coaching methods benefited MFIP recipients: 100 percent agreed or strongly agreed that coaching helps recipients break goals into smaller tasks, and that this helps MFIP recipients achieve their goals; and 77 percent agreed or strongly agreed that coaching helped recipients set realistic goals based on their executive skills, and that coaching helps recipients develop strategies that will move them into employment. Most also agreed that coaching tools are easy to use (85 percent).

MFIP focus group participants also had positive views of the goal-setting approach

"When I have to look at this (list of issues I have to address) all by myself it is too overwhelming; this (task list) helps make it more manageable."

— MFIP Focus Group Participant

Fewer employment counselors agreed or strongly agreed that coaching helps move recipients to employment more quickly (46 percent) or find a job that is a good fit for them (54 percent). Based on interviews, this likely reflects the LLI's multi-faceted approach, which focuses on goal-setting and attainment for short-term goals in multiple areas, which may reflect steps needed to reach longer-term goals such as employment. Depending on the recipient's needs, goals may include housing, child care, or education.

Exhibit 3-2: Employment Counselors' Perceptions of the LLI Approach

Staff Survey Statement	Agree/Strongly Agree	Neither Agree nor Disagree
The LLI coaching is a better way to work with MFIP recipients than our previous approach	92%	8%
Coaching and tools help MFIP recipients set realistic goals based on their executive skills	77%	23%
The coaching and tools help MFIP recipients break large goals into smaller, achievable steps	100%	0%
I consider MFIP recipients' executive skills often when working with them to set goals and develop action steps	69%	31%
Breaking goals into smaller steps helps MFIP recipients achieve their goals	100%	0%
The LLI tools are valuable in developing strategies to move MFIP recipients to employment	77%	23%
The LLI tools are easy to use	85%	15%
The LLI approach helps MFIP recipients move to employment quickly	46%	54%
The LLI approach helps MFIP recipients find a job that is a good fit for them	54%	46%

Source, Staff survey of Ramsey County employment counselors N=13

Note: The response categories "Disagree" and "Strongly Disagree" were excluded from the table because they were not selected by any respondents. Totals may not add to 100% due to rounding.

Although they have positive impressions of LLI coaching overall, employment counselors reported two circumstances where coaching is challenging. First, tools are difficult to use when the recipient does not speak English. At the time of data collection for this study, the coaching tools had not been translated into any non-English languages, and some concepts such as *goal-setting* and *executive skills* were difficult to describe. Second, coaching is not as easy when the recipient is in crisis mode (e.g., lacks housing or utilities). In these instances, counselors reported they often address immediate needs directly, waiting to focus on goal-setting until the crisis is resolved. Program managers, however, reported they work with employment counselors to use coaching techniques in all situations, noting that they believe coaching can help recipients develop steps to overcome crises.

- ***Staff reported the LLI orientation helped set a collaborative tone and build rapport between employment counselors and MFIP recipients.***

Employment counselors reported consistent use of the LLI orientation materials, including the PowerPoint presentation and corresponding forms. Most reported that the orientation represented a departure from and improvement to the standard MFIP orientation of the past. As shown in Exhibit 3-3, 69 percent of counselors responding to the survey agreed or strongly agreed that the redesigned orientation was an improvement.

One goal of the LLI orientation was to clearly communicate MFIP opportunities and available services, rather than just its requirements. About half of the counselors responding (54 percent) reported that the LLI orientation does a better job of communicating the opportunities that MFIP can provide, and only 8 percent disagreed (with the rest remaining neutral). Employment counselors reported that because the LLI orientation is conducted one-on-one or in a small group, they can tailor the discussion of opportunities and services to the recipients and engage in a discussion rather than a lecture. Counselors reported that this setting helps recipients feel more comfortable sharing information that is useful in coaching sessions to set meaningful goals, and the new tone sets the stage for a collaborative relationship between recipient and counselor.

LLI Orientation Sets Collaborative Tone

The redesigned orientation “tells the client what the program has to offer. I think it lets clients know that the program has changed and that we will work side-by-side with them moving forward.”

— MFIP Employment Counselor

Almost two-thirds of the employment counselor respondents (62 percent) reported that the LLI orientation helps recipients develop goals, although about one-quarter did not. Based on interviews, this may in part be because the orientation serves as an introduction to the goal-setting process, and while actual goal development occurs during the orientation for some recipients, for others goal-development occurs in subsequent meetings.

Finally, the designers’ intention was to reduce recipients’ cognitive overload by reducing the paperwork they need to complete in orientation. About half of counselors responding (54 percent) agreed that streamlining paperwork had that effect, although about a quarter (23 percent) disagreed. This likely reflects that MFIP still requires some forms that LLI could not reduce or eliminate.

Exhibit 3-3: Employment Counselors’ Perception of the LLI Orientation

Staff Survey Statement	Agree/ Strongly Agree	Neither Agree nor Disagree	Disagree
The revised orientation is an improvement upon the old orientation	69%	15%	15%
The revised orientation helps MFIP recipients develop SMART goals	62%	15%	23%
The revised orientation helps MFIP recipients better understand the goals of the MFIP program and the services available	54%	38%	8%
The revised orientation helps MFIP recipients focus on key program elements by reducing the amount of paperwork.	54%	23%	23%

Source: Staff survey of Ramsey County employment counselors, N=13

Notes: The response category “Strongly Disagree” was excluded from the table because it was not selected by any respondents. Totals may not add to 100% due to rounding.

- ***For some employment counselors, moving to a one-on-one or small-group orientation format adversely affected their workloads.***

In interviews, staff reported the redesigned orientation took the same amount of time or longer to complete (one and a half to three hours) than the standard orientation had (one and a half

hours). Because the LLI orientation is tailored to the recipients' needs and circumstances, staff reported that its length varied significantly depending on recipient circumstances. Staff reported that the orientation tends to take longer if recipients have difficulty developing goals, have significant barriers to address, or are non-English speakers.

The new format particularly affected Workforce Solutions employment counselors, who previously did not facilitate orientations. Scheduling and conducting small-group or one-on-one sessions greatly increased their workloads. Staff at Workforce Solutions used small group sessions when they could and found they are also generally effective in setting the collaborative tone. Employment counselors at Goodwill–Easter Seals were accustomed to conducting one-on-one and small-group orientations and thus did not report large changes in workloads.

- *Employment counselors reported that the initial assessment was a critical element of the LLI, and the My Bridge of Strength tool was particularly useful in assessing recipients' strengths and weaknesses.*

In interviews and the survey, employment counselors reported that the initial assessment, conducted as part of the Employment Development Plan, was an important element of the goal-setting approach. As shown in Exhibit 3-4, nearly all employment counselors often or always work with recipients to identify strengths and weaknesses (92 percent) and discuss potential barriers and possible solutions (100 percent). In particular, counselors reported that the assessment process and the wide range of areas covered by *My Bridge of Strength* were important to understanding the multi-dimensional nature of many recipients' needs.

Because the *My Bridge of Strength* was implemented earlier than the other tools, counselors had more experience using it and thus may have been more comfortable with it. Staff also explained that the initial meeting(s) with recipients and use of the *My Bridge of Strength* uncovered issues recipients otherwise might not have identified and that helped them establish specific goals in each domain. Employment counselors reported using the *My Bridge of Strength* consistently to identify areas of focus for initial goals (100 percent reported using the *My Bridge of Strength* often or always).

Only 31 percent of counselors reported often or always using the *Getting to Know You Questionnaire*. Several of the counselors interviewed reported that this tool could be redundant with the *My Bridge of Strength* or other tools. However, some staff reported the *Getting to Know You Questionnaire* can be a helpful resource when a recipient is hesitant to share personal information or to better understand the background of some recipients, particularly non-English speakers.

Exhibit 3-4: Employment Counselors' Use of LLI Activities and Tools

LLI Activities	Frequency		
	Often/ Always	Sometimes	Never/ Rarely
Assess Strengths, Weaknesses, Barriers			
Identify the customer's strengths and weaknesses	92%	8%	0%
Discuss strategies to accommodate weak executive skills	38%	46%	15%
Discuss barriers to accomplishing identified goals and possible solutions	100%	0%	0%
Use of LLI Tools:			
<i>My Bridge of Strength</i>	100%	0%	0%
<i>Getting to Know You Questionnaire</i>	31%	23%	46%
<i>Executive Skills Questionnaire</i>	15%	46%	38%
<i>My Profile</i>	23%	23%	46%
<i>Strategies for Success Pocket Guide</i>	15%	38%	46%
Identify and Set Goals and Tasks			
Identify and revisit the customer's goal(s)	100%	0%	0%
Walk customer through the process of breaking down the SMART goal into small achievable steps	69%	31%	0%
Identify the specific task(s) that the customer will work on prior to the next meeting	100%	0%	0%
Use of LLI Tools:			
<i>My Pathway</i>	69%	31%	0%
<i>My Task-Plan-Do-Review</i>	85%	15%	0%
Review Goal Progress			
Review the customer's progress on his/her task(s) identified during the previous meeting	92%	8%	0%
Discuss strategies for future success if a customer is not making progress	100%	0%	0%

Source: Staff survey of Ramsey County employment counselors, N=13

Note: Percentages may not sum to 100% due to rounding.

- *Employment counselors had discretion over the tools they used, and employed tools to assess executive skills strengths and weakness less frequently.*

Employment counselors were trained to use the *Executive Skills Questionnaire* to promote MFIP recipients' self-awareness of their strengths and weaknesses and to inform development of goals and tasks, as well as planning appropriate employment services. In practice, 46 percent said they use this tool sometimes (see Exhibit 3-4) and only a small proportion of the counselors (15 percent) reported using it often or always. In interviews, employment counselors reported several reasons for less frequent use of the *Executive Skills Questionnaire*, including uncertainty in how to correctly use it, difficulty in explaining the assessment to recipients, or the time it took to administer. Similarly few counselors (15 percent) reported using the *Strategies for*

Success Pocket Guide often or always (46 percent use it rarely or never). In interviews, counselors reported they felt insufficiently trained on the tool or uncomfortable using it.

Though many employment counselors did not regularly use these tools focused on executive skills, 69 percent reported that they consider someone's executive skills often when working with them to set goals and develop action steps (see Exhibit 3-1). More than one-third (38 percent; see Exhibit 3-4) reported they often or always discussed strategies to accommodate weak executive skills. This indicates that employment counselors may be identifying executive skills strengths and weaknesses through coaching, conversation, and the other LLI tools.

Employment counselors who did sometimes use the *Executive Skills Questionnaire* reported in interviews that when they did, they found the tool most helpful for recipients who had a hard time setting goals, had difficulty describing their strengths or challenges, or did not believe they had any challenges.

- ***Employment counselors work with MFIP recipients to set and revisit goals and tasks.***

As noted earlier, setting goals, sub-goals, and tasks to reach those goals is the central component of LLI coaching. Interviews and the staff survey found that setting goals and tasks, monitoring progress on goals and tasks, and revisiting goals and tasks are common activities for staff. All survey respondents reported that they identify and revisit recipients' goals (100 percent; see Exhibit 3-4). Most responding counselors (69 percent) reported often or always working with recipients to break down their goals into small, achievable steps. They also reported regular use of both LLI goal-setting tools: 69 percent used *My Pathway* and 85 percent *My Task-Plan-Do-Review*. These two goal-setting tools are designed to be used together; that is, tasks on the *My Task-Plan-Do-Review* tool lead toward accomplishment of incremental goals and long-term goals outlined on the *My Pathway* form. However, some employment counselors reported they preferred to use one over another.

Employment counselors reported that for each new goal set, they typically use a new *My Task-Plan-Do-Review* tool to record the action steps. They also reported often using the *My Task-Plan-Do-Review* tool to monitor recipients' progress regularly, and that the tool helps them keep track of the tasks that recipients should be working on.

- ***Based on program administrator interviews, individual counselors varied regarding the extent to which they understood and implemented the coaching approach as designed.***

In interviews, program administrators reported that the LLI requires employment counselors to understand how to use each LLI tool and when to use it. As designed, tools that assess strengths and weaknesses should be used to drive individual goals to ensure goodness of fit. Though managers reported that many employment counselors use the LLI tools as part of the goal-setting process, some do not adequately engage recipients in goal-setting and attainment. Managers noted that the latter are generally more prescriptive in their overall approach and less comfortable with the recipient-driven LLI approach. In contrast, the counselors who use the tools as envisioned are more likely to have social work or coaching backgrounds, to be more flexible, and to be willing to share responsibility with the recipient.

- *The LLI is more time consuming than the previous approach, and high caseloads make it difficult to consistently implement all tools and use them as often as sometimes desired by some counselors.*

Though the employment counselors have a positive attitude toward the LLI, they also reported that the LLI took more time than their previous methods of working with recipients. This was because of time it took to determine recipients' needs, complete assessments, and develop goals that are a good fit. Staff reported that not all recipients benefit equally from the LLI tools, and as reported above, employment counselors did not use some tools on a regular basis. For example, some recipients come to MFIP with clearly defined goals and steps and do not need the same level of coaching. In spite of this, the LLI program still took more time overall.

Large caseloads make it difficult to implement the LLI as designed

"It is very hard to make it (the LLI) work when you are hampered by a large caseload. We need to follow-up sometimes every week depending where (the client) is at. With the (current) caseload sizes we cannot sustain the quality of the approach. We can't have quality and quantity."

— MFIP Employment Counselor

On the staff survey, employment counselors reported caseloads of about 70 at Goodwill–Easter Seals and about 85 at Workforce Solutions, on average. Given these high caseloads, the extra time required to use the LLI tools sometimes makes it difficult to use the tools consistently over time or across recipients. Though the LLI does not mandate tools all be used or be used in a particular order, employment counselors reported not having time to use tools as often as they wanted.

- *A key factor in implementing the LLI, according to counselors and managers, was the flexibility provided by Ramsey County in meeting federal work participation requirements.*

Coaching is largely about establishing recipient-driven choices over the services they receive; that is, listening to understand their service needs and goals, and then starting with their needs from that point. Employment counselors reported that accommodating this recipient-driven approach and determining appropriate steps to meet each recipient's incremental goals meant that they could not always assign core activities countable toward the federal WPR. Instead, per Minnesota and Ramsey County guidance, counselors allow recipients to participate in activities important to meeting their individual goals (e.g., addressing a housing problem, preparing for a GED exam) but that may not count toward the WPR. That said, several staff said they believe that effective coaching ultimately will result in better outcomes for recipients over time as goals are achieved, including participation in work activities countable toward the WPR.

Similarly, staff reported dedicating less time under the LLI than the previous program to enforcing compliance in required activities. Staff explained that because recipients were given greater choice over the activities they attended, recipients were more likely to meet the requirements established for them without enacting more punitive measures such as sanctions which reduce the amount of the recipients' MFIP cash assistance.

- *Managers and employment counselors reported an interest in ongoing training from LLI experts to help them implement the LLI approach, particularly related to the integration of executive skills tools into the goal-setting process.*

Employment counselors participate in regular peer- and supervisor-led meetings to practice coaching approaches and review challenging recipient scenarios. Staff reported, however, that this peer-led support, while helpful, was insufficient, particularly with executive skills assessment and development. As noted above, counselors frequently reported that they were uncertain of how to correctly use the executive skills tools and integrate the assessment into the goal-setting process. Since this uncertainty was widespread among the employment counselors, peer-led support could not offer sufficient instruction and guidance. Many of the employment counselors expressed a desire for additional guidance from the LLI developers, with opportunities for practice and expert feedback.

3.3 Enhancements to the LLI under Consideration

Operating at only two employment service providers in Ramsey County, the LLI was designed as a pilot program. Ramsey County staff and the Mathematica team are considering a range of new strategies to build on those already in place. During the study period for this report, the LLI remained relatively stable. However, staff are continuing to develop strategies to strengthen and refine the tools and approach. As of March 2017 (at the time of the last site visit), this included the following:

- **Guidance on prioritizing use of goal-oriented tools.** Recognizing that employment counselors have time constraints, the LLI developers are considering writing additional guidance for them that would define each coaching tool as core or optional, to help counselors prioritize their use.
- **Monitoring fidelity to the approach.** In February 2017, the Mathematica team recommended that Ramsey County administrators consider developing fidelity guidelines that would identify core organizational practices associated with the LLI model. Supervisors could use such guidelines to monitor fidelity of implementation and ensure consistency in service delivery.
- **Shorter and more frequent meetings with MFIP recipients.** LLI administrators are encouraging employment counselors to hold shorter and more frequent meetings with recipients—appointments of not more than 30 or 45 minutes weekly or biweekly. Currently, the length and frequency of the meetings vary; counselors reported meeting with recipients as often as weekly and as infrequently as monthly and that meetings often ran more than an hour. Shorter meetings are expected to allow for more frequent follow-up on task and goal progress and to encourage counselors to focus on a smaller number of topics. Some employment counselors, however, expressed concern about their ability to shorten meetings, noting that the process is recipient driven. Counselors also were uneasy about cutting meetings short if a recipient needs services immediately.
- **Structured incentives.** As discussed in Chapter 2, incentives are an important element in a goal-oriented approach. The LLI did not include them in its initial design, however, in order to focus on launching other components. As of March 2017, with these other components

in place, the LLI designers are considering three levels of defined incentive use. The level of incentive would align with the level of task difficulty and would allow counselors to reward a recipient's efforts, not just end results.

- Level 1 (\$10): Accomplishing a straight-forward activity or task such as task initiation, planning, organization, time management, attendance, task completion, information-gathering related activities.
- Level 2 (\$30): Accomplishing an activity that is considered a stretch for the recipient (e.g., goal-directed persistence, achieving short-term progress goals or multi-step tasks, following-through on tasks, and achieving consistency).
- Level 3 (\$50): Rewarding long-term goal-directed persistence, goal achievement on a substantial long-term goal, or achievement of multiple progress goals.
- **Counselor Bridge of Strength.** LLI designers plan to develop a version of *My Bridge of Strength* for employment counselors to help them understand the goal-setting approach from the recipient's perspective. The *Counselor Bridge of Strength* would establish standards for coaching in several areas and allow employment counselors to set their own personal goals in these areas. LLI designers also expect that this tool will help supervisors use LLI techniques in managing the counselors.
- **Stress management techniques.** As of March 2017, employment counselors began integrating stress management techniques into job search discussions and curricula with a small pilot group of MFIP recipients. The program – called Wellness to Work – consists of a series of modules that emphasize peer-to-peer social support and address healthy living, active lifestyle choices, stress management, and other strategies to promote personal well-being and success in achieving economic security and family stability. The goal is to teach recipients, as well as counselors, stress management skills they can apply broadly; for example, around goal-setting (e.g., ability to look beyond immediate needs and focus on long-term goals) and employment (e.g., ability to manage work demands and conflicts without compromising employment).

4. Lessons and Conclusions

Ramsey County's Lifelong Learning Initiative (LLI) aims to help MFIP recipients set their own employment-focused goals and break them into manageable, achievable tasks. In this way, the program is designed to encourage recipients to not only work towards positive employment outcomes but learn important planning and time management skills, as well as gain a sense of accomplishment with each completed step. Employment counselors facilitate this goal-oriented approach by: (1) assessing the recipient's strengths and weakness; (2) coaching rather than directing the recipient to establish goals that are a good fit; (3) planning steps to achieve the goals; (4) coaching the recipient to do individual tasks; and (5) reviewing progress on task achievement and setting new goals. Ramsey County is one of the first TANF programs in the country to explicitly integrate goal-oriented coaching into its employment services.

The implementation findings presented in Chapter 3 reflect the early operational period of the LLI at two MFIP employment services providers in Ramsey County (Workforce Solutions and Goodwill Easter Seals). This includes a 10 month period in which staff were trained in cohorts and tools were tested and modified, followed by eight months of full program implementation. Thus, the report findings reflect an early operational period when the program was still maturing and adjustments and refinements were being made. Drawing from these findings, this chapter presents operational lessons intended to inform policymakers and program administrators interested in exploring a goal-oriented coaching intervention.

- *Implementing the LLI approach involved significant time and training, including additional program resources.*

Ramsey County program administrators invested additional resources to develop the LLI and train staff. Specifically, Ramsey County MFIP administrators: (1) contracted with several expert consultants to assist in developing the approach, a step deemed critical given the specialized knowledge required to develop tools and processes for implementation in a TANF employment program, (2) provided multi-day trainings to staff in cohorts, with each cohort practicing coaching and using the tools for several months before the intervention was formally implemented, and (3) refined the coaching techniques and tools following each cohort training based on feedback from the employment counselors.

The employment counselors reported that it took time, practice, and ongoing guidance to learn to use the new approach and tools and ultimately change how they interacted with recipients. Moreover, in the interviews conducted for this study, counselors also reported a need for ongoing support or refresher trainings, and an opportunity to discuss areas where they were experiencing difficulties. The experience of Ramsey County indicates that this level of training is likely needed to bring the change to staff practices necessary for goal-oriented coaching.

- *Caseload size and other responsibilities are important considerations when implementing an LLI-type approach.*

Counselors consistently reported that the goal-oriented approach required more time with recipients than a more directive approach and this could be difficult given their high caseload sizes. Ramsey County administrators integrated the LLI into existing MFIP employment services,

and thus most tools and procedures were in addition to existing forms and processes. Further, the one-on-one or small group orientation format added to the counselors' workload.

Employment counselors at Workforce Solutions reported more burden in implementing the LLI. Workforce Solutions counselors have average caseloads of 85, compared to 70 among their Goodwill counterparts. Moreover, orientations were previously conducted in large groups by case aids, rather than the employment counselors. The combination of higher caseloads and the added responsibility of facilitating one-on-one or small group orientations led to greater time constraints among Workforce Solutions counselors compared to Goodwill-Easter Seals.

Recognizing the time commitment associated with coaching, as designed, the LLI trainings stressed that employment counselors are not expected to use all LLI tools with every recipient, as some tools may be unnecessary for some (e.g., recipients who are already working may benefit less from the goal-setting tools and may also be less receptive to completing them). The ability to be selective in the application of the LLI tools was particularly important when staff faced high caseloads. Ramsey County has considered developing a set of core tools – while making other tools optional – to help staff prioritize their time with recipients. Providing guidance on which tools to prioritize, and in which situations, appears to be an important next step in the development of the approach.

Ramsey County administrators also provided employment counselors with some flexibility in the orientation format. Counselors reported that the one-on-one orientation format was difficult to operationalize when there was a high volume of new or returning recipients. Counselors found that a small group setting also worked well and allowed more time for one-on-one follow-up meetings with recipients.

- *Employment counselors varied in using all tools consistently. They used the My Bridge of Strength almost universally while they experienced more difficulty with the executive skills-oriented ones.*

Employment counselors reported consistent use of several LLI tools, particularly the *My Bridge of Strength* to identify areas of need and set long-term goals and break them into smaller incremental goals and the *My Task-Plan-Do-Review* to establish tasks necessary to achieve incremental goals and track progress. They reported less frequent and inconsistent use of the set of tools related to executive skills. Under the LLI, the assessment of executive skills strengths and weaknesses was designed to be a key tool to support goal development and tasks to reach the goal. Counselors who rarely used the executive skills tools reported that they did not feel confident in how to correctly use them or tie them to the goal-setting process, or did not have time to use them. While employment counselors do participate in regular peer- and supervisor-led meetings to practice coaching approaches and review challenging recipient scenarios, some counselors reported that support was insufficient, particularly with troubleshooting executive skills assessment and goal development. Additional supports for counselors – including regular training or support by subject matter experts or guidebooks with examples or scenarios for incorporating the LLI tools into the goal-setting process – may help them feel more comfortable working with recipients to develop executive skills-informed goals.

- *Appropriate staff selection is important for implementing the LLI approach.*

While staff training is important, MFIP program managers in Ramsey County reported that staff with certain types of skills were able to adopt the approach more easily than others. These managers reported that successful coaching under the LLI focuses on identifying tasks through recipient-identified goals, rather than counselor-identified plans. The counselors that adopted the approach more easily often came from social work or coaching backgrounds and were more flexible in their approach to recipients. In contrast, program managers report that some employment counselors do not adequately use the tools to engage recipients in goal-setting and attainment. Managers note that these employment counselors are generally more prescriptive in their overall approach, they often have extensive experience working in TANF programs focused on the WPR, and tend to be less comfortable with the recipient-driven emphasis under the LLI.

- *It is important to balance recipient-driven goal development with a focus on employment outcomes in a mandatory employment services program.*

MFIP program managers reported that the LLI approach could be a significant change for counselors who had previously focused on meeting the WPR. Employment counselors reported that accommodating this approach and determining appropriate individualized steps to meet incremental goals meant that they could not always assign recipients to core activities countable towards the WPR. The implementation of the LLI benefitted from Minnesota and Ramsey County guidance, issued independently of the LLI, allowing employment counselors to permit recipients to participate in activities that were important to meeting goals and finding employment (such as addressing a housing problem or preparing for a GED exam) but may not count toward the WPR. Program managers and staff reported that it would have been difficult to implement the LLI as intended without this flexibility.

The degree to which goal-oriented coaching can align with core WPR activities will have implications for its implementation in other TANF settings. Using a goal-oriented process within a TANF program requires a balance between goals and tasks that focus on addressing barriers and those focused on moving to employment. While the ultimate goal of the LLI is employment and improved economic well-being, in line with the TANF program goals, short-term tasks often address needs and barriers in a wide range of domains (e.g. housing, mental health, children's' needs) that may not count towards the WPR.

During the LLI implementation, administrators and program managers worked to ensure that the LLI maintained a connection between tasks in these different areas and the overall goal of employment, but staff sometimes looked for additional guidance in this area. In some cases, a recipient's area of short-term focus may have only indirect connections to employment, such as stabilizing housing. Counselors had difficulty in some circumstances keeping employment, particularly for those recipients with significant and multiple barriers to employment, as prominent goal. Guidance for counselors on balancing short-term tasks and employment goals is another area for further attention in refinement of the approach.

4.1 Conclusion

In sum, Ramsey County made a significant investment in the development and implementation of the LLI, a goal-oriented approach to improve employment outcomes for MFIP recipients. The program was well-implemented in most areas and viewed favorably by staff. As it is a new approach, particularly within a TANF program, Ramsey County continued to make refinements and adjustments to their program during the period being studied in this report and beyond.

Given that Ramsey County is one of the first to implement a goal-oriented approach within a TANF program and the ongoing modifications made to the LLI program beyond the study period for this report, additional descriptive research could inform the full implementation of the approach. Future descriptive studies could provide valuable information and lessons on more mature programs and in other states and localities that operate in a different TANF environment. Finally, these studies could provide more systematic measures of the usage of the LLI tools, in order to better understand how, when, and with whom the employment counselors use the LLI approach and tools.

Additional research is needed to determine the extent to which a goal-oriented approach results in improved employment and earnings and family well-being. Future research learning about this program model would benefit from a rigorous experimental design to determine the impact of the goal-oriented approach on employment and other outcomes. In a future report, the broader JSA evaluation is examining the impact of a goal-oriented approach on cash assistance recipient's employment and earnings in two counties in Michigan.

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Appendix A: Lifelong Learning Initiative Coaching Tools

This appendix displays all of the LLI tools developed by Ramsey County and their subcontractors to support the goal-oriented coaching approach. The tools are presented in the following order:

- My Bridge of Strength
- Getting to Know You Questionnaire
- Executive Skills Questionnaire
- My Profile
- My Pathway
- My Task-Plan-Do-Review
- Strategies for Success Pocket Guide

Name: _____

Date: _____

Case #: _____



My Bridge of Strength

Family Stability			Well-Being			Education	Financial and Legal		Employment
Housing	Dependent Care	Transportation	Health	Children's Behavior	Social Support	Education	Financial	Legal	Workplace Skills
I have stable and safe unsubsidized housing	I have reliable child care and back-up	I have reliable transportation and backup	No health concerns affect my employment	Behavior does not limit my employment	I have consistent and effective social support and/or a leadership role in the community	I have at least an AA degree or higher	My income is stable , I am current on my bills, I have money for saving or spending	I have no current legal issues	My strong workplace skills enhance my employability and support career advancement
I have stable and safe housing that is subsidized	I have reliable child care but no backup	I have reliable transportation but no backup	Health concerns sometimes affect my employment	Behavior sometimes affects my employment	I have generally reliable social support that is growing	I have a high school diploma, GED, or entry-level certificate or a post secondary certificate	My income is stable , I am current on my bills but I don't have money for saving or spending	My legal issues are not work related and do not take work time	My workplace skills support my employability
I am living in temporary housing, unsafe housing, or am at risk of losing housing	I have child care but it is not reliable	I have transportation options but they are not reliable	Health concerns often affect my employment	Behavior often affects my employment	I have a limited social support network with few positive influences	I am attending high school, GED, entry-level certificate classes, or other training	My income is sometimes enough to cover my basic living expenses	My legal issues take me away from work some times	My workplace skills often interfere with my employability
My family has no housing	I have no child care		Health concerns prevent my employment	Behavior prevents my employment	I have no social support; my network is draining or destructive	I have no high school diploma, GED, or entry-level certificate	My income is not enough to cover my basic living expenses	I work certain jobs , or I have lost jobs because of my legal issues.	I need to work on my workplace skills in order to obtain employment

Strengths:

*Workplace skills include, but are not limited to, decision making, communication, conflict resolution, problem solving, anger management, time management, crisis management, planfulness, relationship skills, prioritizing, grooming, and other capabilities that facilitate job performance.

My Bridges is adapted from the Crittenton Women's Union Bridge To Self-Sufficiency and the Minnesota DHS Employability Measures.

Getting to Know You Questionnaire

My name is _____ and I am here to partner with you.

Your name: _____ Today's date: _____

1. What skills and talents do you have that you enjoy? *Check all that apply.*

- | | | |
|--|--|--|
| <input type="checkbox"/> Performing | <input type="checkbox"/> Cooking | <input type="checkbox"/> Painting |
| <input type="checkbox"/> Administration | <input type="checkbox"/> Customer Services | <input type="checkbox"/> Graphic Design |
| <input type="checkbox"/> Building/Construction | <input type="checkbox"/> Dancing | <input type="checkbox"/> Sports |
| <input type="checkbox"/> Caring for animals | <input type="checkbox"/> Driving | <input type="checkbox"/> Teaching |
| <input type="checkbox"/> Caring for children | <input type="checkbox"/> Finances | <input type="checkbox"/> Trading |
| <input type="checkbox"/> Caring for people | <input type="checkbox"/> Fixing things | <input type="checkbox"/> Working with your hands |
| <input type="checkbox"/> Coaching | <input type="checkbox"/> Leadership | <input type="checkbox"/> Writing |
| <input type="checkbox"/> Cleaning | <input type="checkbox"/> Organizing | <input type="checkbox"/> Math |
| <input type="checkbox"/> Science | <input type="checkbox"/> Computers/Electronics | <input type="checkbox"/> Music |
| <input type="checkbox"/> Other: _____ | | |
| <input type="checkbox"/> Other: _____ | | |

2. What do you think are your **three** strongest personal qualities? *Rank your top 3.*

- | | | | |
|---------------------------------------|--|--|--|
| <input type="checkbox"/> Competitive | <input type="checkbox"/> Optimistic | <input type="checkbox"/> Self-controlled | <input type="checkbox"/> Dependable |
| <input type="checkbox"/> Determined | <input type="checkbox"/> Social/outgoing | <input type="checkbox"/> Taking initiative | <input type="checkbox"/> Problem-solving |
| <input type="checkbox"/> Hard-working | <input type="checkbox"/> Creative | <input type="checkbox"/> Coping well | <input type="checkbox"/> Leading |
| <input type="checkbox"/> Ambitious | <input type="checkbox"/> Organized | <input type="checkbox"/> Patient | <input type="checkbox"/> Loyal |
| <input type="checkbox"/> Independent | <input type="checkbox"/> Persistent | <input type="checkbox"/> Honest | <input type="checkbox"/> Being a team-player |
| <input type="checkbox"/> Other: _____ | | | |
| <input type="checkbox"/> Other: _____ | | | |

3. Looking at the skills and talents you checked above, what **three** jobs come to mind that you might particularly enjoy?

- 1: _____
- 2: _____
- 3: _____

4. What kinds of jobs have you held in the past? *Check all that apply.*

- | | | |
|---|--|---|
| <input type="checkbox"/> Construction | <input type="checkbox"/> Retail | <input type="checkbox"/> Administration |
| <input type="checkbox"/> Physical labor | <input type="checkbox"/> Healthcare | <input type="checkbox"/> Supervision |
| <input type="checkbox"/> Factory work | <input type="checkbox"/> Logistics | <input type="checkbox"/> Warehousing |
| <input type="checkbox"/> Food services | <input type="checkbox"/> IT | <input type="checkbox"/> Financial services |
| <input type="checkbox"/> Human services | <input type="checkbox"/> Hospitality | <input type="checkbox"/> Transportation |
| <input type="checkbox"/> Education | <input type="checkbox"/> Self-employed | |
| <input type="checkbox"/> Other: _____ | | |
| <input type="checkbox"/> Other: _____ | | |

5. What are your educational experiences? *Check all that apply.*

- | | |
|--|---|
| <input type="checkbox"/> Did not finish high school | <input type="checkbox"/> High school diploma |
| <input type="checkbox"/> GED | <input type="checkbox"/> Vocational/technical certification |
| <input type="checkbox"/> Some college (# credits: _____) | <input type="checkbox"/> Associate's degree |
| <input type="checkbox"/> Bachelor's degree | <input type="checkbox"/> Master's degree |
| <input type="checkbox"/> Other: _____ | |

What subject did you like **best** in school? _____

What subject did you like **least** in school? _____

6. Are you currently in any training or education classes in order to improve your skills?

- ☐ Yes *What is the program?* _____
- When will you complete the program?* _____
- ☐ No

7. How would you describe your computer skills?

8. Do you have access to a computer or mobile device? ☐ Yes ☐ No

9. Do you have a phone? ☐ Yes ☐ No

10. What types of transportation do you have access to?

11. What is your current employment situation?
- ☐ Unemployed and looking for work
- ☐ Employed part-time and looking for additional work
- ☐ Employed part-time and looking for a new job
- ☐ Employed full-time and looking for a new job
- ☐ Picking up day labor or other work
12. What month and year were you last employed? _____
- Why did you leave your last job? _____
13. In the past five years, what is the longest amount of time you have worked (full-time or part-time)?
- ☐ Less than 3 months ☐ 3 – 6 months ☐ 6 – 9 months
- ☐ 9 – 12 months ☐ 1 – 2 years ☐ 2 – 3 years
- ☐ 3 – 4 years ☐ I have worked steadily over the past 5 years
14. Do you currently have a trade license or certification? ☐ Yes ☐ No
- If yes, what is the license/certification? _____
15. What have you done up to this point in searching for a new job?
- ☐ Applied in person for jobs ☐ Created a cover letter
- ☐ Applied for jobs via email/online ☐ Created a resume
- ☐ Attended job fairs ☐ Have references
- ☐ Networked (with friends, employers, etc.) ☐ Other: _____
16. Are there any issues that might get in the way of you getting and keeping the job you want?
Check all that may apply.
- ☐ Bad credit score ☐ Low reading, writing, or math skills
- ☐ Legal issues ☐ Receiving benefits
- ☐ Delinquent child support ☐ References or work history
- ☐ I-9 documentation ☐ Residential program hours
- ☐ Lack of computer skills ☐ Substance use
- ☐ Lack of education/training ☐ Transportation
- ☐ Language or cultural barriers ☐ Unstable housing
- ☐ Mental health ☐ Child care
- ☐ Physical health ☐ Other: _____
17. Are you in need of any immediate assistance? ☐ Yes ☐ No
- If yes, what do you urgently need? _____

Guidance for Administering the Adult Executive Skills Profile V 4.0 | December 2015

1

WHAT ARE EXECUTIVE SKILLS?

Executive skills are a set of skills that:

1. Help us choose our goals and guide our behavior so that we can reach our goals.
2. Help us work around the behaviors that can derail our progress.

Everyone uses these skills every day. We can think of the 12 skills in 3 clusters:

- Skills we use to organize and plan,
- Skills that determine how we react to things, and
- Skills we use to get things done.

THE ES PROFILE

Knowing our Executive Skills profile helps all of us to better appreciate and use our strengths. It also helps us to choose the kind of support we need. Administering the ES profile can help you get a clearer picture of a participant's skills and how to best support them. If used effectively, the ES profile has the potential to enhance individual goal attainment and overall program outcomes.

GETTING STARTED

Before you begin administering the profile with participants:

- ❖ Complete an executive skills profile on yourself. This will make it easier to relate to the participant's experience. You will be able to give your own real-life examples of how these skills impact your day-to-day functioning. It may also help the participant be comfortable in making honest self-assessments.
- ❖ You should feel comfortable talking about what executive skills are, why they matter, and the statements in the profile. Participants will have questions about individual skills and what strengths and challenges mean for them.
- ❖ Three resources for getting comfortable with this material are the following webinars, available at buildingbetterprograms.org under 'Executive function, EF Webinars'
 - *Executive Function Skills: What They Are and Why They Matter*- Presented by Silvia Bunge, Ph.D.¹.
 - *Using an Executive Function-Informed Goal Achievement Framework to Redesign Employment and Related Human Service Programs*- Presented by LaDonna Pavetti, Ph.D.².
 - *Administering & Using the Adult Executive Skills Profile*- presented by Richard Guare, Ph.D.³

¹ <http://www.buildingbetterprograms.org/2015/05/27/executive-functions-what-they-are-and-why-they-matter/>

² <http://www.buildingbetterprograms.org/2015/07/22/using-an-executive-function-informed-goal-achievement-framework-to-redesign-employment-programs/>

³ <http://www.buildingbetterprograms.org/2015/10/08/administering-using-the-adult-executive-skills-profile/>
<http://www.buildingbetterprograms.org/category/executive-function/tools-for-practitioners/>

THE ES PROFILE IS DESIGNED TO:

- ❖ Offer clarity about a participant's existing strengths and challenges.
- ❖ Help prioritize time and resources to support a participant.
- ❖ Help staff and participants identify appropriate employment and/or education opportunities based on their current skill profile and desired skill development.
- ❖ Provide assistance to staff in planning client services.

THE ES PROFILE IS NOT DESIGNED TO:

- ❖ Be a clinical or diagnostic tool.
- ❖ Be a research tool – it is not intended to measure change in executive skills over time.

SCRIPT & TIPS FOR USING THE PROFILE

First, make sure you are familiar with all the statements and comfortable answering questions about the profile. Below is a sample script of how to introduce this to a participant:

Today I want us to talk about something called executive skills. You may or may not have heard about these before, but we all use them every day and they are critical in helping us become successful. These skills are used to help us organize and plan, react to events, and get things done on a daily basis. We use these for both small and large tasks, from doing laundry to finding a job. The statements we will go over together assess 12 different skills. We all have some of these that we are better at and some that are real challenges for us. By honestly assessing these, you can hopefully get to know yourself better and we can better develop a plan for your continued success. Knowing what you are good at can help inform job searches and education opportunities. Knowing what creates challenges for you can help us to figure out what kind of support you need so those challenges don't get in the way. As we go through this, feel free to ask questions!

As you go through the assessment, keep the following things in mind:

- ❖ Make sure the participant is comfortable with rating the statements. Remind them that we all have strengths and areas that are challenging for us. *Remember, no profile is "better" or "worse" than any other.*
- ❖ It is helpful to discuss your own skills profile to make a participant feel more at ease and also to give examples that highlight different skills. It may be especially helpful for you to talk about a challenge and what you do to not let it get in the way.
- ❖ It may be useful to point out your own observations if they are unsure of how to rate an item. You may help them remember situations when they needed to use these skills and discuss the outcome.
- ❖ Make sure to balance your discussion of challenges and strengths. This leads to a more productive plan and a willing participant.

WHAT NEXT?

When all items have been rated and each section has been totaled, look at the three highest and three lowest scores. *The highest scores are the strengths, and the lowest scores are personal challenges.* Other resources are available to help you and your client jointly use results of their ES profile.

<http://www.buildingbetterprograms.org/category/executive-function/tools-for-practicioners/>

Executive Skills Definitions

How We Organize and Plan Things

Organization: Knowing where I put things

The ability to create and maintain systems to keep track of information or materials.

Time Management: Knowing about how long a task will take and what the deadline is

The capacity to estimate how much time one has, how to allocate it, and how to stay within time limits and deadlines. It also involves a sense that time is important.

Planning/ Prioritization: Deciding what steps to take

The ability to create a road map to reach a goal or to complete a task. It also involves being able to make decisions about what is important to focus on and what is not important.

How We React to Things

Response Inhibition: Seeing the consequence before I say or do something

The capacity to think before you act – this ability to resist the urge to say or do something allows us the time to evaluate a situation and how our behavior might impact it.

Flexibility: Going with the flow, accepting change

The ability to revise plans in the face of obstacles, setbacks, new information, or mistakes. It relates to an adaptability to changing conditions.

Emotional Control: Keeping my cool when frustrated

The ability to manage emotions in order to achieve goals, complete tasks, or control and direct behavior.

Stress Tolerance: Managing my stress

The ability to work in stressful situations and to cope with uncertainty, change, and performance demands.

Metacognition: Evaluating how I'm doing

The ability to stand back and take a bird's eye view of yourself in a situation, to observe how you problem-solve. It also includes self-monitoring and self-evaluative skills (for example, asking yourself "How am I doing?" or "How did I do?")

How We Get Things Done

Task Initiation: Getting started without a delay

The ability to begin projects without undue procrastination, in an efficient or timely fashion.

Sustained Attention: Paying attention, even when I don't feel like it

The capacity to maintain attention to a situation or task in spite of distractibility, fatigue, or boredom.

Goal-Directed Persistence: Sticking with my goal

The capacity to have a goal, follow through to the completion of that goal, and not be put off or distracted by competing interests.

Working Memory: Remembering what I did and what I need to do

The ability to hold information in memory while performing complex tasks. It incorporates the ability to draw on past learning or experience to apply to the situation at hand or to project into the future.

A Look at How You Organize Things, React to Things, and Get Things Done¹

You may have never heard of “**Executive skills**” but they are skills that you use every day -- we’re all good at some and not so good at others. They are skills we use to manage our life and achieve our goals. They help us accomplish big goals, like completing a training program, or saving for a down payment for a house. They also help us achieve smaller goals like getting to work on time or completing the paperwork to get childcare.

This profile will help you get to know yourself better by looking at how well you:

- ❖ Organize Things
- ❖ React to Things
- ❖ Get Things Done

INSTRUCTIONS

1. Read each item and then think about how well it describes you. Use the rating scale to choose the best score. If the item doesn’t describe you at all, circle 1, *strongly disagree*. If it describes you very well, circle 6, *strongly agree*. Often, you’ll find that you’re somewhere in between so circle one of the numbers from 2 to 5 that describes you best. Be as honest as possible—the more honest you are, the more you’ll learn about yourself.
2. Total each section in the box on the right. Here’s an example:

	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
Organization (<i>Knowing where I put things</i>)							
I am an organized person.	1	2	3	4	5	6	12
I keep my space neat and have things where they belong.	1	2	3	4	5	6	
I organize my work before I start doing it.	1	2	3	4	5	6	

3. Now, look back over your whole profile. Your highest scores indicate what you do easily (strengths). Your lowest scores are the areas that are harder for you (challenges). We’ll look at these more closely so that you can use your strengths and work through your weaknesses – to reach your goals.

¹ Adapted from Peg Dawson and Richard Guare, Copyright Guilford Press (2012, 2016). This adaptation was done in conjunction with the Center on Budget and Policy Priorities for use with employment and human service programs.

2

Executive Skills Profile

Organization (<i>Knowing where I put things</i>)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I am an organized person.	1	2	3	4	5	6	
I keep my space neat and have things where they belong.	1	2	3	4	5	6	
I organize my work before I start doing it.	1	2	3	4	5	6	

Time Management (<i>Knowing about how long a task will take and what the deadline is</i>)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I finish what I set out to do by the end of the day.	1	2	3	4	5	6	
I am good at guessing how long it takes to do something.	1	2	3	4	5	6	
I am on time for appointments and activities.	1	2	3	4	5	6	

Planning / Prioritization (<i>Deciding what steps to take</i>)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I have a clear plan in mind for what I need to do each day.	1	2	3	4	5	6	
I focus on the most important things when I have a lot to do.	1	2	3	4	5	6	
I break big tasks down into smaller tasks and set deadlines to get everything done.	1	2	3	4	5	6	

Adult Executive Skills Profile

3

Response Inhibition (<i>Seeing the consequence <u>before</u> I say or do something</i>)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I listen before I draw conclusions.	1	2	3	4	5	6	
I think before I speak.	1	2	3	4	5	6	
I get all the facts before I take action.	1	2	3	4	5	6	

Flexibility (<i>Going with the flow, accepting change</i>)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I respond well to unexpected events.	1	2	3	4	5	6	
I easily adjust when plans change.	1	2	3	4	5	6	
I am flexible and adjust well to new situations.	1	2	3	4	5	6	

Emotional Control (<i>Keeping my cool when frustrated</i>)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I do what I am supposed to do, even if I get frustrated.	1	2	3	4	5	6	
I keep my cool, even if my feelings are hurt.	1	2	3	4	5	6	
I hold onto my temper.	1	2	3	4	5	6	
Stress Tolerance (Managing your stress)	1	2	3	4	5	6	Total
I enjoy working in a highly demanding, fast-paced environment.	1	2	3	4	5	6	
A certain amount of pressure helps me to do my best.	1	2	3	4	5	6	
I find it easy to manage a constantly changing work schedule.	1	2	3	4	5	6	

4

Executive Skills Profile

Metacognition (<i>Evaluating how you're doing</i>)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I can review a situation and see how I could improve.	1	2	3	4	5	6	
I know when I am doing a good job.	1	2	3	4	5	6	
I easily recognize when a job is a good match for my skills.	1	2	3	4	5	6	

Task Initiation (<i>Getting started without a delay</i>)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
No matter what the task, I believe in getting started as soon as possible.	1	2	3	4	5	6	
I do things that I say I'll do, without delay or putting things off.	1	2	3	4	5	6	
Even if interrupted, I finish jobs before the last minute.	1	2	3	4	5	6	

Sustained Attention (<i>Paying attention, even when I don't feel like it</i>)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I stay focused on what I am doing.	1	2	3	4	5	6	
I keep working until the job is done.	1	2	3	4	5	6	
I find it easy to get back on track and complete what I started.	1	2	3	4	5	6	

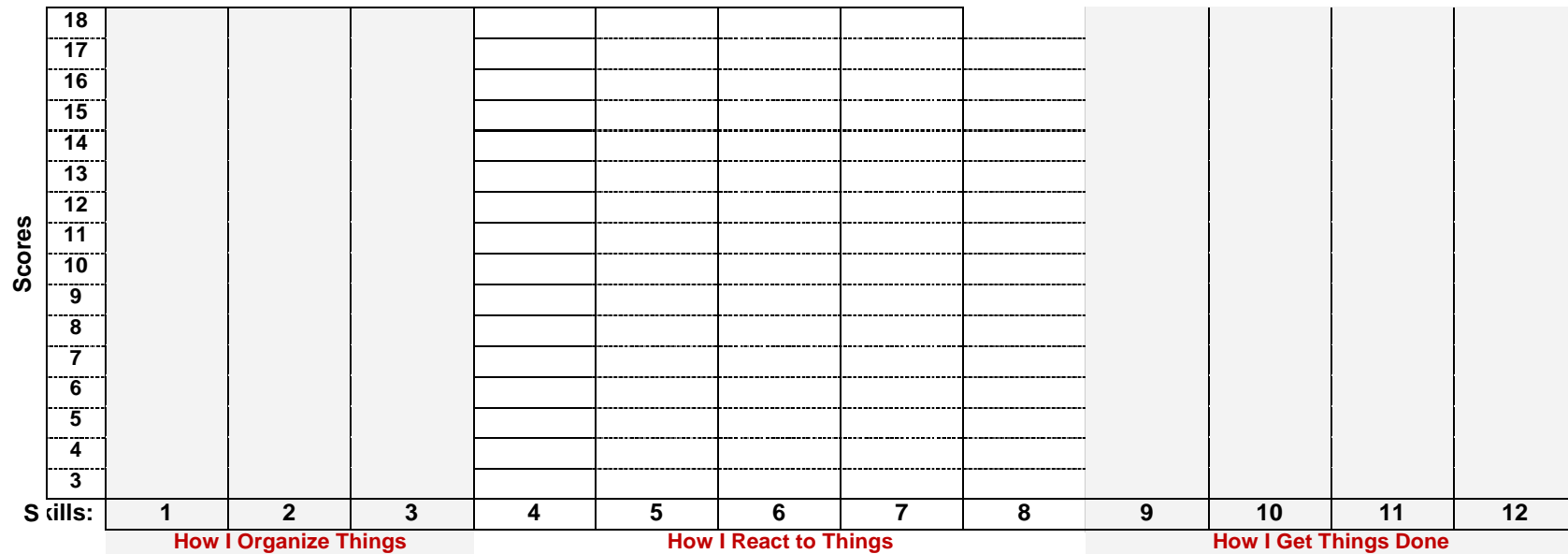
Goal-Directed Persistence (<i>Sticking with your goal</i>)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I am driven to meet my goals.	1	2	3	4	5	6	
I give up short-term pleasures to work on long-term goals.	1	2	3	4	5	6	
I set goals and I perform to my best ability.	1	2	3	4	5	6	

Working Memory (<i>Remembering what I did and what I need to do</i>)	1 Strongly disagree	2 Disagree	3 Tend to disagree	4 Tend to agree	5 Agree	6 Strongly Agree	Total
I have a good memory for facts, dates and details.	1	2	3	4	5	6	
I am very good at remembering the things I am supposed to do.	1	2	3	4	5	6	
I set reminders to get things done.	1	2	3	4	5	6	

My Profile

Instructions:

- Use the graph below to create a visual of your executive skills profile. For each skill, shade up to the row that indicates your score. For example, if you scored 5 for Planning Ahead, shade in up through row 5 in the first column of the graph.
- Look over your patterns of strengths (higher scores) and weaknesses (lower scores) in each area: **How I Organize Things**, **How I React to Things**, and **How I Get Things Done**.
- In thinking about working toward your goal: *Name one way to use your strengths to accomplish your goal. Name one weak area that might get in your way.*



1 ORGANIZATION

Creating and maintaining systems to keep track of information or materials

2 TIME MANAGEMENT

Believing that time is important, estimating how much time we have, deciding how to use it, and staying within the time limits and deadlines we've agreed to

3 PLANNING & PRIORITIZATION

Creating a roadmap to reach a goal; making decisions about what is important to focus on and what is not

4 RESPONSE INHIBITION

Thinking before we act; resisting the urge to say or do something that we might regret later

5 FLEXIBILITY

Switching up when things get in our way; adapting to obstacles, setbacks, or unexpected changes.

6 EMOTIONAL CONTROL

Managing emotions in order to achieve goals, complete tasks, or control and direct behavior

7 STRESS TOLERANCE

Doing well even in uncertainty, change, and high demands

8 METACOGNITION

Looking at how we are acting, how we handle ourselves, and how we affect other people

9 TASK INITIATION

Beginning projects and not putting them off; taking the first step

10 SUSTAINED ATTENTION

Pulling back from being distracted, tired, and bored to the person or task that is right in front of us

11 GOAL-DIRECTED PERSISTENCE

Following through to the completion of the goal and not being put off by or distracted by competing interests

12 WORKING MEMORY

Holding information in our minds while doing something new, remembering how we solved a problem and using that strategy to solve a new one

My Pathway

My Long-term Goal:

Progress Goal #3:

Progress Goal #2:

Progress Goal #1:

My Starting Point:

My Pathway

Progress Goal:

Tasks:

My Task-Plan-Do-Review

TASK

What do I want to do?

PLAN

How will I do it?

DO

When will I do it?

REVIEW

How did it go?

Process adapted from Kenworthy et al: Solving Executive Function Challenges: Simple Ways to Get Kids with Autism Unstuck and On Target (Brookes Publishing: 2004),



Strategies for Success

A Pocket Guide

When we're working toward goals, we can get in our own way. Despite our best efforts, we sometimes find it hard to organize things, control our reactions, or get things done. If we just had some strategies to help us get past our own weaknesses, life would be easier!

This pocket guide is divided into three sections: (1) **How I Organize Things**, (2) **How I React to Things**, and (3) **How I Get Things Done**. Each section offers a variety of strategies that other have found useful.

- ✓ Focus on one weak area that might get in your way this week. For example, maybe you find it hard to organize things. Start there!
- ✓ Go to the "How I Organize Things" section of this pocket guide, and see which ideas are most useful for you. For example, the section has strategies for keeping track of information and materials, managing time, or planning a task.
- ✓ Find one strategy you'd like to try out and put it into place right now. For example, one idea for keeping track of materials is to write down everything you need for each day and put it in a calendar. Pull out a calendar and draft your lists for each day this week.
- ✓ Choose realistic expectations for yourself. For example, if you forget stuff almost every day of the week, you might aim to have all your things organized 2 out of the 5 days this week. That's a step in the right direction!
- ✓ Don't feel "childish" with the detail and simplicity of some of these strategies. The best strategies are often ones that seem so simple, but which make a huge difference!
- ✓ Try out your new strategy for one week. See how things go and adjust as you see fit.
- ✓ Remember two things:
 1. These are new habits; experimenting will take a bit of time.
 2. Aim for improvement, not perfection!

We hope that the strategies in this pocket guide are useful to you. These are just a few ways you can try to support yourself to accomplish goals near and dear to your heart. Experiment and ask others for support.

You can do this!

SECTION 1

HOW I ORGANIZE THINGS

1. Ideas for keeping track of information and materials

It drives us all crazy when we can't find something—it eats up our time and our energy. There are many ways we can keep track of where we put things and find them when we need them! Here are a few strategies:

- ✓ When you go to bed at night, put things right where you need them in the morning. For example, put things you need to take with you by the front door with your keys.
- ✓ Take an hour this week to clear out the clutter in one living or work area. Get rid of as many distractions as possible from the area. If you don't have a place for the stuff you clear out, put it all in one box marked "don't need this here now."
- ✓ Spend 30 minutes each day this week deciding on a "home" for each of the things you use regularly so that you can find what you need easily and quickly. Every item in your house should have a "home."
- ✓ Create a simple calendar just for this week. List all the things you need to get ready each evening in preparation for the next day (including your outfit). Post your "What I'll Need Tomorrow" calendar somewhere you're likely to see it, such as on the fridge or bathroom mirror. Each night this week, check the calendar and see how it helps you keep track of your things.

SECTION 1 **HOW I ORGANIZE THINGS****2. Ideas for managing and estimating time**

Do you run late, lose track of time, or underestimate how long things will take? Don't kick yourself. Time management may not be one of your strengths, but there are lots of ways you can help yourself to better estimate how long something will take and how to stay within the time you have to do it.

- ✓ Set clocks ahead to give yourself a cushion of time.
- ✓ Set reminders on your phone 30 minutes before you need to be out-the-door to get somewhere.
- ✓ Create a visual reminder for yourself and post it somewhere you will see it—and notice it!
- ✓ Ask a friend to call you or send you a text well in advance of a deadline.
- ✓ Map out all the steps you need to take in order to complete the project you're working on. Use arrows and write down how long you realistically think each step will take. Ask a friend or co-worker to take a look at your steps and estimated times. How realistic do they think these are? Edit the timeline based on their feedback.
- ✓ If you feel like you underestimate how long things will take, you might want to “time” how long it takes you to do specific things each day (getting ready for the day, getting children out the door, getting the bus to work/school/regular appointments AND walking in to appointment). Use the timer on your phone that starts when they get up and ends when they get out the door, etc. Having an accurate representation of how long things take will help you manage time better and allow yourself enough time to get things done without stress.

SECTION 1 HOW I ORGANIZE THINGS

3. Ideas for planning a task you care about

You may be someone who feels constrained by the idea of planning—and doesn't even like the word "plan!" But, without a doubt, a plan saves time, energy, money, and frustration. And, a written plan is a lot easier to follow than one in your head. Follow this process to create a plan.

- ✓ Identify one task that is especially important to you – something you really want to get *done* this week.
- ✓ Break down, in order, the steps required to complete the task. Put a star beside those steps that you really want to get down.
- ✓ Each night this week, before going to bed, review your steps. Check what you've done and celebrate that. If you didn't get something done on the day you planned to do it, rewrite it for another day later in the week. And, as always, ask for help if you need it.
- ✓ Each morning tell yourself one thing -- one specific thing that you want to accomplish that day before laying down to bed. Make it your business to get that one thing done, even at the expense of other things that may feel urgent but are less important to you.

SECTION 2

HOW I REACT TO THINGS

1. Ideas for staying cool in situations where you tend to have problems

Do you say or do things without thinking that get you into trouble? Or, do you tend to react strongly when plans change? If so, dealing better with unexpected things that come up may have a real positive impact on you at home and at work. Envision the situation and envision what you want to do instead. Here are the steps:

1. Think about a situation in which you have reacted strongly or impulsively.
2. Write down some things about that situation that “push your buttons.”
3. Imagine what you could have done instead that would have felt better and led to a better outcome.
4. Now imagine a similar situation in the future and describe how you would like to react instead. Write it down:

If this happens then I will

5. If you like, post this reminder of how you want to act in this situation. You may also tell someone whom you trust what you are working on and ask them to give you feedback on how you are doing.
6. Give yourself an inspiring incentive after every time you react the way you had hoped.

Here are a few more tips for those of us who react strongly:

- ✓ If you feel your buttons getting pushed in a conversation, ask the other person if you can think about this and continue the conversation another time. “I’m feeling a little worked up right now and need to step away. Can we come back and discuss this tomorrow morning?”

If you feel your buttons getting pushed often at work, designate someone you can call or go see when you feel worked up. This can also be the person you go to when you’ve reacted beautifully and want to proudly tell someone!

SECTION 2 HOW I REACT TO THINGS

2. Ideas to manage your stress

Stressful situations affect everyone differently. What is stressful to you may be exciting to someone else. Here is a strategy to help you manage your reactions to stress:

1. Think about tasks at home or at work that you find stressful.
2. Write them down on one side of a piece of paper.
3. On the other side of the paper, think of possible ways to change the task. Examples:
 - ✓ Find someone else to do the task or switch with them and do a task they don't want do.
 - ✓ Make a plan to mentally prepare what you will say to get ready
 - ✓ Break the task into small pieces and do something that you enjoy between each piece
4. Reward yourself for every time you react to a stressful situation in a positive way.
5. Keep a log of the ways that you have made progress.

Another universal strategy for keeping cool is to meditate for a few minutes each day. There are many ways to try meditation. Here's one:

1. Find a quiet space where you can sit without any distractions for 10 minutes.
2. Choose something small to concentrate on. One option is your breathing; say to yourself as you breathe: "This is the in breath; this is the out breath." You can also choose a word or a phrase that inspires you and repeat that to yourself several times.
3. As thoughts come up, let them float by in your mind and return to concentrating on your breath. Notice the thoughts that come into your mind and then let them go. Don't judge yourself harshly for having other thoughts.
4. If possible, try to meditate at the same time every day. Do not feel that you have to keep increasing the time you meditate. Doing 10 minutes every day will help you for a very long time.

If you get into a meditation habit, you can recreate the calmness in your body and mind whenever you need. Stressful situations will still come up, but you will be better able to let them pass without reacting.

SECTION 2 HOW I REACT TO THINGS

3. Ideas for learning from the past

Some of us have trouble learning from our experiences. We tend to run into the same situation again and again, and wonder how we got there. It may help to stop and pause once in a while and look back.

1. Think of a problem that happened recently.
2. Write down answers to the questions below.
 - ✓ *What happened?*
 - ✓ *How did I handle things?*
 - ✓ *What were others trying to tell me that I may have missed?*
 - ✓ *What can I do differently the next time this situation occurs?*

Ask someone you live or work with the same questions to check if you both see things the same way. Do this exercise over the next week and notice what you've learned that can help you in life moving forward.

SECTION 3

HOW I GET THINGS DONE

1. Ideas for getting started

Do you tend to procrastinate? Remember: the greatest journey begins with the first step. Here are three tips for those of us who find it hard to get started.

- ✓ Write down your goal and then write down the tiniest and easiest possible next step you could do toward achieving that goal. For example, if you've been meaning to make a call but don't feel like doing it right now, simply look up the phone number and write it down large on your table – or (better yet!) put it in your phone under an appointment so your phone will show you the number at a time when you'd like to make the call.
- ✓ Imagine you told yourself you'd study for the GED every day this week. It is time and you really have to go do something else now. Take out your GED study guide and put it where you will see it as soon as you are home. Or, better yet, take it with you, so you have it if you find some downtime while out and about.
- ✓ Commit to starting your task and working on it for a small amount of time (10 minutes). After the 10 minutes, if you want to keep going you surely can. If not, congratulate yourself for spending the time that you did on the task and move on.

The bottom line is this: *when you don't feel like starting something, take one tiny step toward doing it.*

SECTION 3 HOW I GET THINGS DONE

2. Ideas for staying focused on your task

Sometimes, once we get started on something, it is difficult to keep working on it. Think about a task you have started but can't quite seem to finish. Do you get bored, distracted, or drained of energy? If so, here are two ideas:

- ✓ Write down the steps you want to accomplish. Write down the reward you will give yourself after each step. Do the first step and take a break to reward yourself by doing something you really enjoy. Some ideas for breaks and rewards: listen to your favorite music, walk outside or look at nature, take a nap, stretch your body, call a friend, paint or draw something you see, look at an art book, or even dance at your desk. Do the next step and the reward you'll get when complete.
- ✓ Check out the app "Forest." It times you to stay on task for 25 minutes; if you do not touch your phone, you get to grow a tree! Sounds silly, but can be super useful!

SECTION 3 HOW I GET THINGS DONE

3. Ideas for sticking to your goal until it is complete

Once you have a goal, you will need strategies to keep following that goal even though many things in your life will get in the way. One helpful strategy is to tell your family and friends about your goal so that they can support you. Other people helping you towards your goal is one of the most important factors in making sure that you actually accomplish it.

- ✓ Identify 3-5 family members and friends that you trust and tell them out loud your goal and your detailed action plan.
- ✓ Ask them for help in reminding you of smaller action steps (for example, if you tend to be late, ask a friend to send you a text message that says “nearly time to go”).
- ✓ Ask them to give you encouragement and positive feedback.
- ✓ Choose one or more friends to have a daily check-in to report on what each of you have accomplished and give support to one another for the challenges you encountered.
- ✓ In addition to asking others for help, you may want to create a visual reminder for yourself of what you are doing and why. (For example, paste images from a magazine or an inspirational quote, or write your goal on brightly colored paper)

SECTION 3 HOW I GET THINGS DONE

4. Ideas for remembering what you need to do

If you struggle with forgetting what you were doing, losing personal items, or losing chunks of time in your day, checklists and routines can be your best friends. Don't feel that you have to remember everything in your brain. Writing things down is a way of "off-loading" a task so the brain doesn't have to work as hard or can use its power to do something else instead.

- ✓ Find a regular "home" for that one item and make an effort to put it back in its "home" every day.
- ✓ Use a whiteboard or a piece of paper to leave yourself giant notes for when you get up or go out.
- ✓ Establish a space by your front door to put things you will need to take with you.
- ✓ Put things you need to remember (items or notes) with your keys or wallet.

Developed by:

Global Learning Partners and Mathematica Policy
Research for the Ramsey County Division of
Workforce Solutions

May 2016

The ideas in this pocket guide draw on ***The Smart but Scattered Guide to Success*** by Dr. Richard Guare and Dr. Peg Dawson, copyright 2016 The Guilford Press, and have been adapted by Global Learning Partners and Mathematica Policy Research with permission of The Guilford Press. Ideas in this pocket guide are also inspired by the work of Martha Beck Inc., FlyLady and Company Inc., and *Late, Lost and Unprepared: A Parent's Guide to Helping Children with Executive Functioning* by Joyce Cooper-Kahn and Laurie C. Dietzel, copyright 2008 Woodbine House.

Appendix B: LLI Orientation PowerPoint Slides

Ramsey County, in partnership with Mathematica Policy Research, Global Learning Partners, and Dr. Richard Guare, developed a new orientation for MFIP recipients as part of the Lifelong Learning Initiative. Employment counselors, who conduct the orientation in a one-on-one setting, use a set of PowerPoint slides to guide the orientation session. This Appendix displays those LLI Orientation PowerPoint slides.



Together, we prepare people for work.

The Minnesota Family Investment Program EMPLOYMENT SERVICES ORIENTATION

Welcome! We are glad you're here and
we look forward to working with you.

Orientation materials developed in partnership with Mathematica Policy Research, Global Learning Partners, and Dr. Richard Guare.

Minnesota Family Investment Program (MFIP) Services

How to use this worksheet:

What questions do you have about these three different types of MFIP services?

Financial services

- Financial services include your cash grant and your food support grant
- You will have a financial worker who is responsible for managing your financial case and processing documents such as your Household Report Form (HRF) and paystubs

Childcare services

- Childcare may be available to support you in working toward your goals
- You will have a childcare worker who is responsible for managing your childcare case and communicating with your child care provider

Employment services

- Employment services provides you with guidance and support as you journey toward financial independence
- Your employment counselor partners with you to set and achieve your goals across life areas directly and indirectly related to employment

For Past Participants Only: Your MFIP Experience

How to use this worksheet:

If you have participated with MFIP previously, tell a bit about your experience and wishes.

How would you summarize **your past experience with MFIP?** (relationship with counselor, supports you found useful, how you felt about it...)

What would you say has brought you **back to the program** now?

What are you wishing will be different in this new MFIP **experience?**



Together, we prepare people for work.

For All Participants:

Here are the core beliefs of MFIP Employment Services.
How do they compare to yours?

What We Believe

- We believe in “guided self-determination” which means that we support you as you set direction for your life.
- We believe that you can learn a lot from looking back at past experiences.
- We believe in the power of setting goals and creating step-by-step plans to achieve those goals.
- We believe that everyone has strengths. Our job is to help you tap those strengths and find support around life’s challenges.

Personal Focus

How to use this worksheet:

1. Think about these different areas of your life and check all the things calling your attention
2. Which **one** of these areas is most important to you right now? Circle it!
3. If it feels right, the counselor may introduce you to “My Bridge of Strength” to look even more closely at these different life areas.

Family Stability	Well-being	Education	Financial and Legal	Employment
Housing	Health	GED	Budgeting and saving	Workplace skills
Dependent care	Children’s behavior	Certification and training	Legal issues	Job search
Transportation	Relationships and social support	Diploma or advanced degree		Career advancement

Where I'm Going and How to Get There

Your name: _____

Today's date: _____

Using this worksheet...

1. Begin on the far right. In a few words, write down where you want to be in one "focus" area of your life. For example: I want to have my GED and hold a better-paying job.
2. When it's time, move to the far left of the worksheet. In a few words, describe where you see yourself now. For example: I don't know where to begin to get my GED
3. Next, move to the center of the worksheet. Name whatever you already see it will take to get where you want to be. For example, I need to make time to go to GED classes and study each week OR I need help finding a GED program that's easy for me to get to.

2 Where I see myself now



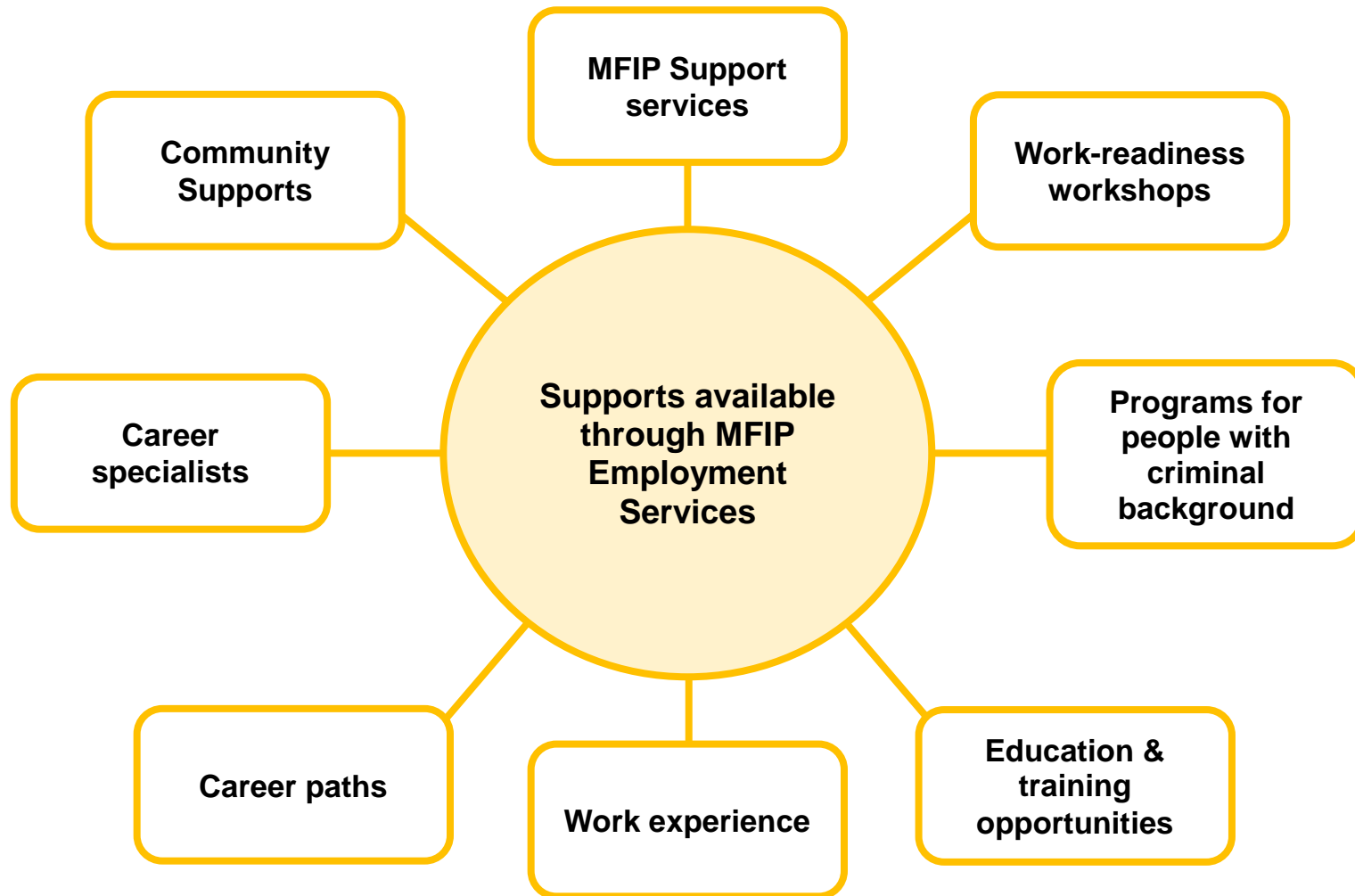
1 Where I want to be

3 What it will take (effort & support)

MFIP Opportunity

Using this worksheet...

Thinking about your area of focus, hear these examples of MFIP supports. Mark those supports that MOST interest you now.



Mutual Expectations

To Set and Achieve Goals



You...

Identify goals and actively participate in activities toward those goals.



I...

Help you navigate and reach your goals by providing information, resources, support, and encouragement.

Do what I say I'm going to do.

To Communicate and Document



You...

Communicate regularly with me.
Use an employment plan (contract that we both sign) to document your goals as they evolve.



I...

Schedule meaningful and productive appointments with you.
Focus on your individual and unique situation.

Each of us is accountable and do what we say we'll do.

The MFIP Journey

This is a snapshot of the journey that people typically take when working with the Minnesota Family Investment Program (MFIP).

What questions do you have now about the overall journey and your upcoming experience?

Establish relationships
We get to know you—
your strength and
needs

You learn about
yourself and get clarity
about what you want in
life

You learn more about
MFIP and how we can
support you

Work together
toward your goals



Leave MFIP
When you achieve your
goals and no longer
need MFIP assistance

When you reach your
time limit (5 years total
maximum)

If you choose not to
communicate with us or
to actively work on your
plan, your MFIP
assistance can be
reduced or your case
may be closed.

My Task-Plan-Do-Review

TASK

What do I want to do?

PLAN

How will I do it?

DO

When will I do it?

REVIEW

How did it go?

Before Leaving....

Please sign the following documents for our files:

1. DHS Notice of Privacy Practices
2. Authorization to Communicate
3. DHS Rights and Responsibilities and Consent

Please also:

1. Take home your worksheets from this session because we will build on them!
2. Choose brochures on other related topics you might find useful.

Jot down this information for our next conversation:

My counselor's name:

Date of my next meeting:

Thanks again!