GOAL, PLAN, DO, REVIEW & REVISE (GPDR/R) GROUP ACTIVITIES GUIDE

An Executive Skills-Informed
Goal Achievement Framework
for Use in Human Service Programs

Revised February 2020

Center on **Budget** and **Policy Priorities**

Global Learning Partners

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TABLE OF CONTENTS

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INTRODUCTION

Goal, Plan, Do, Review and Revise (GPDR/R) is a frmework **that** makes explicit the steps that lead to successful goal achievement The GPDR/R framework works best when used in its entirety, again and again: set a goal, craft a detailed plan, put the plan into action, plan ahead for things that might get in the way of success, review progress and revise as necessary. In this manual, we demonstrate how GPDR/R can be applied in a group setting. The group setting offers several advantages when teaching GPDR/R. For example, people can be inspired by hearing others' goals – and can get valuable ideas from their peers while working through the process. If there is safety in the group, people may be more likely to follow through on intentions because they shared them aloud with their peers. Most importantly perhaps, hearing others at the review and revise stage can remind us that goal achievement is not easy and that getting where we want to go requires support, opportunity, creativity and perseverance. Unlike one-on-one interactions which happen sporadically, many group activities are repeated on a regular schedule, sometimes daily. Because executive skills are built through practice, group activities provide an ideal opportunity for teaching and practicing the executive skills that GPDR/R is designed to build and support.
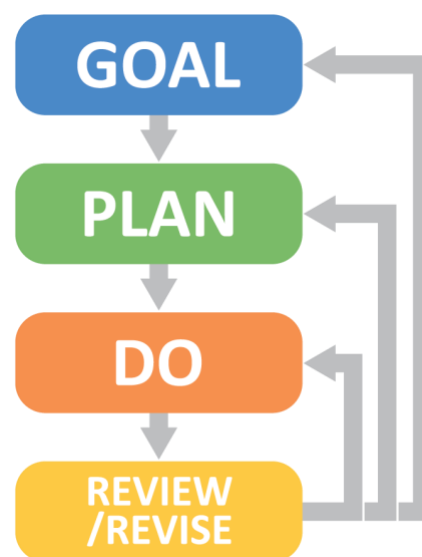
In this approach, your primary role as facilitator is three-fold:

- **Model:** use the GPDR/R framework yourself and show participants how you are using it
- **Practice:** support participants to use the framework, with feedback
- **Build:** repeat opportunities to use of GPDR/R again and again

We think that one of the best ways to teach GPDR/R is to model it as you teach other content that's central to your program. In this chapter we provide instructions for four workshops that do just that. **The workshops are meant to be resources – not recipes.** We encourage you to be flexible with the suggested "scripts," and refer back to the GPDR/R main guide for ideas of words and phrases that are true to the overall approach. Please, always bring your own facilitation style to the workshop. Experiment as you go and discover what works best! Our hope is that you will take the workshops we've constructed and use them as a guide to design your own. To that end, we start this chapter with a workshop design framework. After the workshop designs, we provide additional materials on adult learning and facilitation that we hope you will find useful.
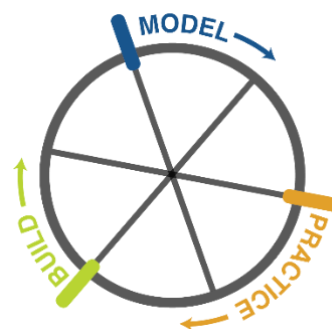
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THE 8 STEPS OF DESIGN™

A Workshop Design Framework

What makes for a good workshop? It all starts in the way the workshop is built. Like a pyramid, a strong workshop is built from a strong foundation. When building a workshop, we answer a series of questions, beginning with: *Who is this workshop for? Why is this workshop needed?*

Below is a snapshot of **The 8 Steps of Design™** framework that has proven to be a very useful tool for building effective workshops. The next page offers a brief explanation of each part of the framework, so that you can use it to create any workshop.

The Learning Tasks
HOW?

The Content
WHAT?

The Achievement-Based Objectives
WHAT FOR?

The Time & Timing
WHEN?

The Anticipated Change
SO THAT?

The Place & Space
WHERE?

The People
WHO?

The Current Situation
WHY?

The 8 Steps of Design™

WHO?	**The People**	A deep understanding of who will participate and who will lead it
WHY?	**The Current Situation**	A description of the situation that is calling for the workshop
SO THAT?	**The Anticipated Change**	A realistic vision of what will be different as a result of the joint learning experience
WHEN?	**The Time and Timing**	A detailed description of the time available for the workshop, noting how this influences the possible amount and depth of content to cover
WHERE?	**The Place and Space**	A decision on the best location to support the learning, and a description of the limitation that the place might offer
WHAT?	**The Content**	A carefully constructed set of skills, information, and perspectives to focus on in the learning
WHAT FOR?	**The Achievement-Based Objectives**	A specific description of what learners will do during the program with each piece of priority content, in order to learn it
WHAT FOR?	**The Learning Tasks**	A flexible, yet structured, process through which all learners build their skills and share their learning

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WORKSHOPS &
GROUP ACTIVITIES

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GOAL ACHIEVEMENT INTRODUCTORY WORKSHOP

Purpose and People

This workshop walks participants through the entire goal achievement sequence: **Goal, Plan, Do, Review, Revise (GPDR/R)** so that they can use it again and again to support their goals, both big and small.

The workshop is designed for participants in any phase of a group activity like job readiness or job search, and for groups as small as 3 or as large as 15. For groups beyond 15, we suggest 2 facilitators to ensure personal support as clients identify their goals and develop their plans. Facilitators will be most effective if they themselves have experimented with the GPDR/R framework to achieve their own personal goals.

Timing and Frequency

The workshop has two parts. Each part is designed for about 2 hours – but more time would be good if you want to "dig deeper." The two parts of the workshop can be separated by anywhere between one day or one week. If you have more than one week between workshops, we suggest personal outreach to each participant in the interim to check in.

You may use this workshop at the start of a program to introduce participants to the goal achievement process. You may repeat it later on by having participants focus on different kinds of goals – for example, the first time focus on a goal about any aspect of their life and then focus on an explicit job search goal. *The intent is that after introducing the process, you will use the entire process or pieces of it throughout your program. Repetition is key to building skills.*

Materials and Advance Preparation

We suggest creating a packet for each participant that includes one copy of each tool and worksheet they will use, in the sequence in which you will use them during the workshop.

TOOLS

You will use the tools listed below in this workshop. You will find them in the order they are uased at the end of the workshop design.

1. **GPDR/R Worksheet**
2. **Goal Storming**
3. **Life Areas**
4. **My Guide to Using GPDR/R**
5. **Worksheet: Do the Plan**
6. **Worksheet: Review & Revise**

POSTERS AND CHARTS

Day One:
- One sheet of large blank paper per team and one marker per person.

Days One and Two:
- One set of five (5) small posters, one for each step: Goal, Plan, Do, Review, Revise.
- One chart with the words Goal, Plan, Do. (You will write your personal example on this chart as the workshop unfolds).

Note: *You may adapt these participant materials to reflect your own approach to goal achievement. For example, if you model and practice SMART goals with clients, you may incorporate SMART guidelines into step one of GPDR/R.*

ACHIEVING OUR GOALS	Workshop Overview	
DAY ONE	**DAY TWO**
Objectives	
On day one, clients will: • Explore a **path** for achieving your next goals • Set one heartfelt and achievable **goal** • Develop a **plan** for achieving your goal and map out specific action steps to **"do"** the plan	On day two (at least 1 day later after participants have had the opportunity to "do" their plan), clients will: • **Review** their experience • **Revise** their goal and/or their plan • **Reflect** on this **goal-achievement process** and make it their own
Agenda	
30 min. │ Achieving Life's Goals 15 min. │ Goal Storming 15 min. │ One Personal Goal 30 min. │ A Plan for Getting There 15 min. │ Getting Ready to "Do" the Plan 15 min. │ Closing	30 min. │ Celebrate 20 min. │ Review 20 min. │ Revise 30 min. │ Take it Away 20 min. │ Closing │ Ongoing Support

Notes:
(1) *Workshop Days One and Two should be separated in time by anywhere from one day to one week.*
(2) *The times on this agenda are rough estimates based on doing the workshop with a small group of participants. Day one might be a little tight, and day two a little loose; so please adjust time as you see fit. Also keep in mind that you will need more time for a larger group, especially one that shares a lot!*

ACHIEVING OUR GOALS | Workshop Day One

Note: Text in *italics* offer suggested language that you can adapt throughout the workshop; text in regular type provides any necessary explanations.

30 min. | Achieving Life's Goals

Introduction:

- **Open with a powerful affirmation that EVERYONE in this room has been setting and achieving goals their whole life.** In fact, chances are that the individuals here today have faced and overcome many challenges, while creatively and effectively pursuing what they want for themselves and their families. *In this two-part workshop we'll explore a process for goal achievement that may enhance what you've been doing your whole life. To anchor us, we'll work together toward a shared goal and see what happens!*

A Shared Experience:

- Divide the group into teams of 3-4. If you have a small group, they can work together – but otherwise create teams (a mini competition makes it fun!).

FACILITATOR TIP
This opening activity is a very important **"anchor."** The intent is for participants to have a shared experience of the whole goal achievement process: choose or cllarify a goal, make a plan, get support to put the plan in action, and then review how they did. It gives participants the big picture before getting into any details. You will refer back to this experience throughout the rest of the workshop. You will also get good insights into what to emphasize and how to support individual participants through the remainder of the workshop.

- *As a team, you're going to pursue a goal together and achieve it in 10 min. Here's the task: Imagine that your cousin is going through a rough time and decided to move here to your home city/town. She is raising two kids alone and will be looking for work (living with you until she has a place of her own). She asked you to create a "map" of the city/ town for her, showing the places she should know to get her oriented when she first arrives. Work as a team to create that picture (a simple map using images and/or words). Your goal is to have something ready to photograph and send to her in 10 min. You can use each other and anything else you have here in the room as a resource while you pursue the goal. What are your questions?*

- Give each team paper and markers (different colors if possible). Once they begin, be careful not to interfere or guide, except to answer questions to clarify the goal or to confirm the resources they might use. For example, if they ask to use a cell phone to look up some information, that's fine! If they reach out to a friend who has some useful information, that's fine too. But, wait until they ask about resources to let them know what they can use.

- After 10 min. ask them to stop. Review the team (or each team's work) and congratulate them, wherever they got. Review the experience with the following open questions:
  - *How did you feel about this **goal** when you began?*
  - *How much time or effort did your team spend on **planning** what you would do?*
  - *While **doing** the "map", what resources did you use?*
  - *What strengths and support did each team member bring?*
  - *What did you like about this experience? What might you do differently next time?*

A Path to Achieve Your Goals

- Reflect: *We set and pursue goals everyday. Sometimes we name the goal clearly, sometimes we take the time to create a plan, sometimes we use other people and other resources to help us achieve the goal, and sometimes we take the time to learn from our experience. But, often, we don't approach goals that way. Rather, we just start our day doing the next thing that is calling our attention. That can be overwhelming and can leave us feeling like we're spinning our wheels. So, we've found it helpful to step back and explore a proven approach to setting and achieving goals.*

- Together, read through **My Guide to Using GPDR/R**.
  - *Which step described here feels most important based on your experience and why?*
  - *What are you curious about?*

- As you read through the guide with the participants, you may write each step on small posters spaced out along the walls of your room. You'll use these visuals as you walk through the steps. Explain: *Next, you'll go through each of these steps around a goal you care about. You don't have to share the goal or any of the other steps in full group if you don't want to – but you also can get input along the way if you want.*

15 min. | Goal Storming

- Explain: *This goal achievement process requires that we start with one personal goal. It can be difficult to focus on one goal because we are attentive to many areas of our life at one time. To focus on a goal that matters deeply to you right now, we'll begin with a tool we simply call "Life Areas."*

- Invite participants to reflect on different areas of their lives right now to note what is calling their attention in each. You may walk through the life areas by name, briefly, as they reflect. Give a few minutes for each participant to privately circle and write responses on the sheet.

- Next, move to the **tool: Goal Storming**. Invite participants to focus on ONE life area and brainstorm the goals they have in that area.

> **FACILITATOR TIP**
>
> To start, participants may use a combination of two tools: **Goal Storming** and **Life Areas**. You may want to demonstrate it once using your own example first.

15 min. | One Personal Goal

- Explain that, from their brainstorm of goals, they will now choose one that they want to focus on in this workshop.

- Offer an example of short-term goal within a life area that is important for you, the facilitator. Make sure it is truly meaningful to you and doable between now and the next part of this workshop (anywhere between 1 day and 1 week from now). You may write it at the top of a chart, to which you'll add each step of GPDR/R as the workshop continues.

- Emphasize two essential elements of a goal:

    1. **Meaningful:** *Name one specific goal that is truly important to you. There is no right-or-wrong goal if you care about it now.*
    2. **Doable:** *Choose a goal that is challenging, but that you feel you could accomplish by the time we get together again (i.e. tomorrow, or in a week).*

> **FACILITATOR TIP**
>
> Starting here, participants will use **The GPDR/R Worksheet** to capture their thinking.

- You may walk around and encourge participants to choose a goal that they find meaningful AND challenging, but within reach. **Ask them how they'd feel about sharing the goal aloud with others in this room.**

  Before moving on, ask each participant to fill in the Goal section of the **My GPDR/R Worksheet**.

- As you see fit, invite them to say their goal aloud to one other person (or to the group, if all are comfortable with that.)

FACILITATOR TIP
Throughout the workshop, use the opening "Shared Experience" to underscore some of the key concepts in goal achievement. For example, you may emphasize the value of having a clear picture of what we are trying to accomplish before mapping out a plan.

30 min. | A Plan for Getting There

- Look at the plan step of the GPDR/R Worksheet. Explain that developing a plan involves

  1. **Action:** writing down specific steps to move us toward our goal
  2. **Resources:** identifying the resources and support that will help us succeed
  3. **Planning Ahead:** anticipating things that might get in our way.

FACILITATOR TIP
Thinking through details of a plan might feel like hard work. So, let participants know there's a reason for it! Writing plans down increases the chances that we will do the plan. *Once we get in a habit of planning this way, it becomes easy! In fact, it can help us feel more relaxed because our plans are all laid out. Remember: You can always change the plan – don't feel limited by it – what matters is having a plan in the first place!*

- Offer your own example of a plan by naming a few specific steps you will take toward your goal. Then, name any resources you need to complete the steps. Then, name one thing that might get in your way and how you plan to avoid it or overcome it. [You may write your plan on the large chart under your goal.]

- Walk around the room and be a thinking partner as participants think through a focused, concrete plan. Having scraps of paper or sticky notes might be helpful to some.

- Hear a few volunteers share their plans aloud in full group. Affirm 1) the action steps; 2) the resources named; 3) the preparation (planning ahead) noted. Emphasize how your program is designed to provide resources and support to participant as they work through their plans.

15 min. | Getting Ready to "Do" the Plan

Mindset:

Explain that plans exist on paper – and rarely are implemented exactly as written! So, in order to be successful, we first want to get into the right mindset.

- Invite people to call out words that describe the mindset they want to have going into this plan. Share examples of the mindset you want to have to do your plan successfully such as: *flexible, confident, realistic, gentle with myself…*

Supports and Encouragement:

- In order to successfully implement a plan, we want to rely on some support. There are many different kinds of support we may draw on. For example:

    1. Routine support (such as setting reminders on your phone or using a calendar to track appointments)

    2. "Just in time" support (such as calling your sister the moment you feel discouraged)

    3. Personal support (such as giving yourself a break when you feel stuck).

- [Optional] Refer to ideas and questions on the **Woksheet: Do the Plan**. Work with participants as they jot down supports they want to use. Invite volunteers to share examples of supports they will use to do their plan successfully.
- Encourage participants to jot down notes on the **GPDR/R Worksheet** under the "do" step over the next day/s.
- Remind everyone: *Achieving our goals is a process that takes time and can be hard work. Get the support you want – in whatever form. And, keep experimenting with what makes it easier for you to put a plan into action!*

15 min. | Closing

- Encourage participants*: Keep* the ***My Guide to Using GPDR/R and GPDR/R Worksheet*** *handy. It can be a valuable reminder of what they learned and decided here today.*

    Goal: *What you aim to accomplish before the next day of this workshop,*

    Plan: *Steps and ways around obstacles*

    Do: *Supports you'll use to do the plan*

- Ask them to bring the tool back to the next workshop. *When we come back for the next session, we'll celebrate whatever happened – and make adjustments to you goal or your plan as you wish. Enjoy your journey!*

- Check in on how people feel walking out the door. Explain how they can reach out to you before you see them again.

ACHIEVING OUR GOALS | Workshop Day Two

Note: Text in *italics* offer suggested language that you can adapt throughout the workshop; text in regular type provides any necessary explanations.

30 min. | Celebrate

Welcome everyone to day two of "Achieving Our Goals" – a workshop in which we support each other to priortize and achieve goals we care about. We'll celebrate whatever happened and exchange insights based on what we know about goals from our own life experience.

- Point out the **GPDR/R posters** around the wall. Ask people to get up out of their seats and stand next to the poster that represents what they are most proud of. For example:

  o *If you are still commited to the goal you set, or if you refined that goal to be even more meaningful to you, then stand by the poster that says "Goal."*
  o *If you worked some of the steps of your plan – or worked around an obstacle that came up in your plan, then stand by the poster that says "Plan."*
  o *If you reached out for some support or gave yourself encouragement as you put your plan into action, then stand by the poster "Do."*

- Encourage everyone to think BIG about this goal achievement process. *It really isn't about having achieved the one goal you set out for yourself but, rather, about getting into a rhythm of naming goals, making plans, pursuing those plans and learning from what happened.*

20 min. | Review

- Introduce this step: *When we pursue our goals, most of us move onto the next thing without taking time to pause and reflect on what happened. Learning from where we've been - and setting ourselves on a new path – is a really important part of the process. So, that is what we'll do now.*

  o Reflect aloud on the goal you named in the first workshop
  o Remind them of your goal and plan
  o Tell them about how you put your plan into action – and what you discovered along the way by responding to these questions:

    What went well?
    What did not go as planned?
    What did I learn?

- Invite the participants to interview each other (in pairs) using the same "review" questions above. Encourage them to jot down their thoughts under "Review" on the **GPDR/R Worksheet**.

- Remind them that these questions are carefully constructed to help us learn from our experiences and build on them. Without such a review, we can find ourselves in a rut of doing the same-old, same-old and not feeling like we are making progress. In other words: In pursuit of our goals, no experience is a failure; it is only progress and a learning experience!

[Note: if the group seems reluctant to interview in pairs, you could invite one participant to be interviewed by you in front of the others. Everyone will learn from the process.]

- [Optional] You may use the **worksheet "Review and Revise**," focusing first on the questions under "Review." Explain that the last of the "review" questions leads us directly into "revise".

20 min. | Revise

- The "Revise" step of a goal achievement process is often neglected but can be the most critical – and most satisfying.
- Have each participant work independently to revise their goal, plan, or action steps.
- Encourage them to jot down their thoughts on the Revise worksheet. (When they are ready to work through any revisions, encourage them to use a new **GPDR/R Worksheet**) Walk around to offer individual guidance and encouragement as much as you can.
- In full group, ask for volunteers to share what they will revise moving forward:
    - A new goal?
    - A different plan? A different kind of support?
    - A next step?

30 min. | Take it Away

A Path to Achieve Your Goals

- Scan back over the opening **tool**: **My Guide to Using GPDR/R.**
- To synthsize the process, invite participants to stand up under the posters that represent their response to each of the questions below. After each question, take a few minutes to reflect on where people are standing and invite them to comment about why they stood there.
    - *Which step feels most important to you now, why?*
    - *Which step do you feel is a strength/ comes easily to you? Why?*
    - *What is one thing you've discovered about achieving life's goals?*

A Reminder

- Distribute a blank index card to each participant. Invite people to jot down the steps of the goal achievement process. (Alternatively, you can develop your own reminder card that has the GPDR/R steps on it as well as your and the program contact informaton.)

GOAL	Selecting a goal that is meaningful and within your reach Visualizing what it will feel like to achieve your goal
PLAN	Developing a detailed, written plan Identifying potential obstacles and solutions to address them
DO	Taking steps to do the plan and reaching out for supports you need to put your plan in action
REVIEW / REVISE	Reviewing your successes and revising your plan.

Our hope is that the card will remind you of all the steps of this process. You can carry it around with you – and refer to it often as you work toward a goal.

20 min. | Closing – Ongoing Support

Congratulate all clients for engaging and sharing.

Underscore how important it is for all of us to reach in – and reach out - when pursuing our goals. In fact, goal achievement is less a personal process than it is a community one. We need each other – for encouragement, for resources, for connections, for support.

You may invite participants to look back over the tool titled "Life Areas" and reflect on all the active goals they have in their lives now. Ask: *What is one way that this program – or anyone in it – might better support you and your goals?*

Exchange ideas for mutual support available to us all on our paths toward achieving life's goals.

My Guide to Using GPDR/R

GOAL	• Aim for something you truly care about • Consider something that is challenging but within reach • Be specific about what you want to accomplish and by when you'd like to accomplish it • Think about why the goal is important to you • Imagine what it would feel like to achieve the goal
PLAN	• List the steps to get to your goal • Figure out what resources you need to complete the steps • Pick the steps you'll start with (aim for three) • List the details: when (date and time); where; how you'll get there • Identify obstacles – what might get in the way of success (you can think of these as potholes or bumps in the road) • Come up with a plan to overcome the obstacles (detours)
DO	• Share your plan with somoene you trust and ask them to check in with you • Use reminders or supports (such as an app on your phone) to help you get started, manage your time, stay organized, and stick with it • When you're feeling discouraged, remind yourself why the goal matters to you • Think about what will help you avoid distractions • Check in with your case manager if you're having trouble doing your plan
REVIEW/ REVISE	• Review your progress: What did you accomplish? What went according to plan? What strengths did you draw upon? What didn't go so well? • Think about what you learned: What do you wished you had done differently? What did you learn about yourself? • Revisit your goal: We learn and grow by doing – if things don't go right the first time, try another way. Does your goal still feel like a good goal for you? If yes, stay on the path and take the next steps. If not, think of a new goal that is meaningful to you and challenging but within your reach. • Come up with next steps: Continue with your current plan or come up with a new one – don't forget the details!

GOAL STORMING

Name _____   **Today's Date** _____

Instructions: Write down as many things you want to achieve in the future as you can think of in five minutes. You can also use sticky notes or small pieces of paper. We will use this to guide what we work on next, and how to plan for that goal. There are no right or wrong goals- write down anything that comes to mind. They should be meaningful to you and doable.

MY GOALS
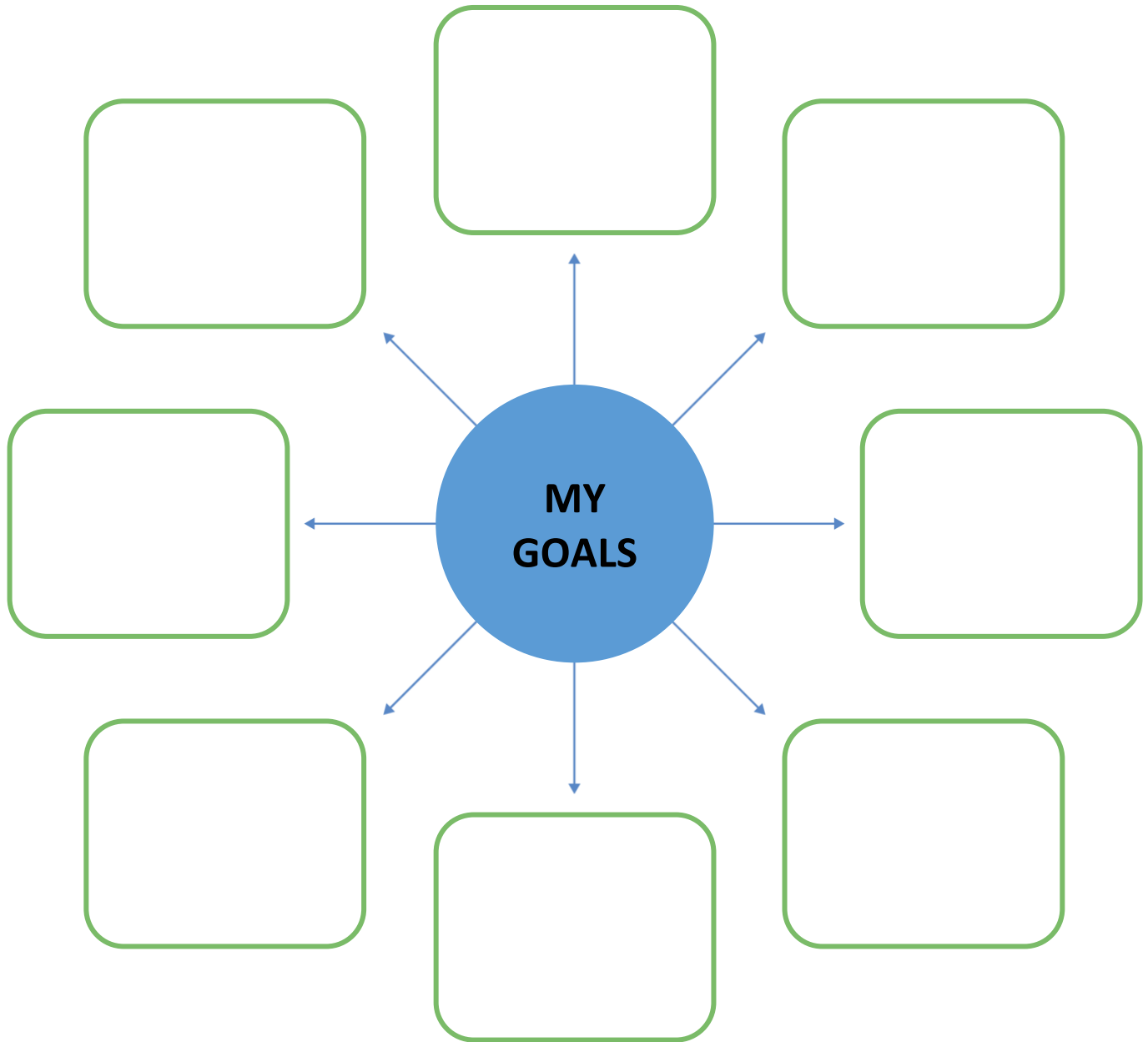
LIFE AREAS

Instructions: This picture identifies areas of our life where we commonly set goals. Some of these areas might be more meaningful to you than others, or you might have important goals in several areas. it's all up to you!

*This is about what matters to **YOU** — here's some things to think about if you get stuck.*

Would I like to focus on?

- *Health and Wellness:* Exercise more, eat healthier, drink more water, address a mental health, health or substance use issue
- *Legal issues:* Resolve some legal issues (pay fines, get a record expunged)
- *Safety:* Move to a safer neighborhood or leave a dangerous living situation
- *Stress:* Learn how to manage stress better or resolve a crisis
- *Financial:* Get out of debt; save money for a special outing; save to buy a car or house
- *Child Well-being, Care & Parenting:* Improve my parenting skills, spend more time with my kids, find better childcare
- *Education & Employment:* Finish high school, get a GED, get training for a specific skill, go to college, find a stable job, find a higher-paying job with more hours, start a business
- *Family, Friends & Relationships:* Spend more time with friends and family, find new friends with a positive outlook
- *Food, clothing & Shelter:* Find housing, find cheaper housing, find housing in a better neighborhood, find ways to make my SNAP benefits last longer, buy some new clothes for me and my kids.

GPDR/R Worksheet

GOAL • Meaningful • Doable • Little bit challenging	

PLAN • WHAT I'll do • DATE and TIME • WHERE & HOW I'll get there • WHAT I need to take with me	To Do #1	To Do #2	To Do #3
• Plan ahead for things that might get in the way:	If Then, **I will**		

DO • My supports • Reminders • Stay focused • Check in • Reward myself!	

REVIEW/REVISE • What went well • Problems • What I learned • What next?	

Worksheet | DO THE PLAN

Everyone needs some kind of support to put a plan into action. Supports can be routine (such as using calendars or alarms) or they can be "just in time" (such as calling a friend when you are feeling stuck.)

Example of **routine supports:**
- Use a small pocket calendar and write each of your action steps for a specific step date / time.
- Get a large calendar and use sticky notes to put each step in a date/ time. If something gets in the way of completing one of your action steps, you can then move things around.
- If you use a smartphone, enter each specific action step in a date/time and use alerts to remind you of each one.
- Load an app onto your phone that has reminders and encouragements.

What's a routine support you want to use?

Example of **"just in time" supports:**
- Tell your family what you are working on and that you'd like them to encourage you along the way
- Think about a friend you could ask to accompany you on one part of your plan
- Think about a someone you know who has experience in what you're trying to do and ask them for some tips

Who could best support you to do this plan?

Even in doing what seems like a simple plan on paper, we can lose energy or focus. That's very common! Giving ourselves **personal support** along the way is key. Personal supports are anything that you find encourages you to keep going. For example:
- Tell yourself you'll get a break after you complete a difficult step
- Give yourself a small treat when you get through a hard part of the process
- Write words of encouragement where you can see them

What will encourage you?

Worksheet | REVIEW + REVISE

Review

To review your goal and your plan, take a few minutes to **ask yourself the following questions:**

- What did I achieve since our last meeting?

- What went well? What strengths did I draw upon?

- What did not go as planned? What got in the way? For example….
    - Did I have trouble getting started on some of the tasks?
    - Did I need things to accomplish the tasks that I didn't have or couldn't find?
    - Did things take longer than I anticipated?
    - Did the goal not feel that important to me after all?

- What have you learned about your strengths and how to use them to achieve your goals?

- What have you learned about reaching out for help and what kind of help would be most helpful?

Revise

Building on what you've learned about what went well and what did not, think about the following:

- How are you feeling about your goal? Does it still feel right to you?

- If you want to set a new goal, return to the **Life Areas** and **Goal Storming tools** if you need some help to come up with a new goal. If you already have a new goal, use the Goal Success Plan tool to identify your goal and develop a plan for achieving it.

- If you want to keep with the same goal, use the **Backward Mapping** or **Action Plan tools** to develop a plan for completing the next steps. Make sure you feel confident that you have all the resources and support you need to achieve your goal. You deserve it!

ACTION PLANNING WORKSHOP

Purpose and People

This workshop walks participants through the entire action – planning process. It can be done as a follow-up to the Goal Achievement workshop that introduces GPDR/R. Or, it can be done instead of that workshop, with participants who would benefit from a detailed planning process.

The workshop is designed for participants in any phase of a job readiness or job search program; and for groups as small as 3 or as large as 15. For groups beyond 15 we suggest 2 facilitators to ensure personal support as clients develop their detailed plans. Facilitators will be most effective if they themselves have experimented with the backward map and action planning processes to pursue their own personal goals.

Timing and Overview

The workshop is designed for about 2.5 hours. Estimated time for each section is in the agenda, below, but this is totally flexible based on your size group – and your personal style.

ACTION-PLANNING | Workshop Overview
Objectives
In this workshop, you will: • **Exchange insights** about how to plan for things we care about in life • **Practice a new approach to planning common, everyday tasks** • **Create a detailed plan** for something you care deeply about • **Named how we can support each other** to fulfill our plans and our heartfelt goals
Flexible Agenda
15 min. | Opening: How We Plan 45 min. | Planning Common Tasks 45 min. | Backward Mapping 30 min. | Action Planning 15 min. | Closing: Living the Plan

Materials and Advance Preparation

We suggest creating a packet for each participant that includes one copy of each tool and worksheet they will use, in the sequence in which you will use them during the workshop.

TOOLS

The tools used in this workshop can be found after the instructions for the workshop.

1. **Backward Mapping**
2. **Sticky Notes**
3. **My Action Plan (Visual) and Potholes and Detours**

15 min. | Opening: How We Plan

Explain: *In this workshop, we're going to exchange wisdoms about how to build an effective plan and we'll share a couple of tools you can use over and over again to make that planning personal.*

To start, think back over the last week of your life. You accomplished lots of things that required planning. Some of us enjoy planning and others don't – but we all do it.

What is one thing you realize you planned and accomplished this past week?

Hear examples in the full group. As you listen, note how many steps there may have been in some of the plans.

45 min. | Backward Mapping Common Tasks

People who pay a lot of attention to planning claim that there are three key characteristics of effective planning:

✓ **Start with the future and work backwards.** Rather than plan from step one, forward – we've discovered it's more effective to begin with the goal we want to accomplish and work backwards to create a plan.
✓ **Break the plan into small steps.** We often think we break tasks into small steps, but we rarely do. Small means really small!
✓ **Pay attention to details.** We are much more likely to complete our plans if we create a detailed plan pay attention to the details

- *What do you think of these characteristics? What else do you think is key to planning for something you really want?*
- *We've got two tools that work together to support effective planning. We call the first of these a "Backward Map." Let's take a moment to check out the parts of the backward map.*
- *The other is called an "Action Plan." Take a moment to check out the parts of the action plan.*
- *We're going to use both of these to plan a set of common, everyday tasks.*

Divide the room into small groups. Each group gets a printed picture of one of the common tasks provided at the end of the workshop instructions and some sticky notes. (You can also come up with your own tasks if you'd like.) Ask each group to use **Backward Mapping** to:

- decide on what steps need to be taken to get to this goal and write each step on a separate sticky note;
- decide what resources/support are needed for each step and write each resource on a sticky note.

After each group has done their backward map, ask them to order the steps. Tell each group to generate one action plan for their common task and post it on the wall.

Invite observations in full group:

- *How was it to map out the steps for these tasks? How did it feel? What would have been helpful?*

Repeat the **Backward Mapping** for one program-related task such as getting childcare or getting a social security card or getting an interview for a job. You may do one as a full group or divide into small groups again, each with a task.

Afterward, invite observations:

- *How was it to create a plan for these tasks?*
- *What might this mean for us as a program that supports people to achieve these kinds of tasks?*

## 45 min. | Backward Mapping Personal Goals

Review the characteristics of an effective plan:

- ✓ **Start with the future**.
- ✓ **Break the plan into small steps.**
- ✓ **Pay attention to details.**
- ✓ **Other characteristics named by the group.**

Explain that everyone will now use backward mapping and the Action Plan to build an effective plan for a goal they really care about. Emphasize that the tools are not important. They can use a blank piece of paper or sticky notes if they prefer. The important thing is that they experiment with a process that honors the

> **FACILITATION TIP**
> *BACKWARD MAPPING*
>
> You may want to prepare a personal example of a backward map. Create the tool on a large chart and work backwards from a goal that is near and dear to your heart. Tell the group what you found surprising, difficult, and useful about using the backward map.
>
>
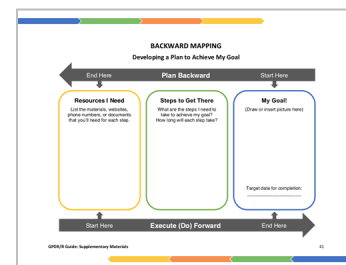
characteristics we all named above. (Here is where you can walk through your personal example.)

Distribute individual copies of the "Backward Map." Walk through it from right to left.

1. **Goal:** Everyone draws or writes a specific goal for the next week. Invite a few examples out loud.
2. **Steps:** Everyone brainstorms steps that would lead to this goal. Remember the steps don't need to be carefully sequenced. Invite one or two examples out loud.
3. **Resources:** Everyone lists resources that would be needed for the steps. Invite one or two examples.

Ask the group: *What did you find surprising, difficult, and useful about using the backward map?*

30 min. | Action Planning

Now, move onto the "Action Plan." To begin show your own action plan on the wall.

Then invite one volunteer to do an action plan with you in front of the others so you can "coach" them through the process, and benefit from their own insights about how to move from the map to a very specific, sequenced, list of actions. We suggest using the Visual Version of the Action Plan that is attached to give people a different way of visualizing a plan.

Finally, invite everyone to complete their own action map.

You may walk around and coach participants as they decide for themselves on a action plan that feels right.

The tool titled **"potholes & detours" helps us each think through obstacles** that might get in our way (potholes) as well as ways to avoid or overcome those obstacles (detours).

- Guide participants through a visualization to make this step realistic and useful: *Envision yourself taking steps toward your goal. Ask yourself: What might get in my way?*

  What might I do to prevent each obstacle or overcome it?

- Walk around the room and guide participants to anticipate internal and/or external obstacles.

> **FACILITATION TIP**
>
> You may also want to prepare a large example of an **Action Plan**, based on your own backward map. Tell the group what you found surprising, difficult, and useful about using the detailed action plan. [Remember – you may use the **visual action plan** tool instead of this traditional one if you prefer.]
>
>
> MY ACTION PLAN (VISUAL)

- You may encourage participants to come up with an "If, Then" statement to identify an obstacle and their response to it. "If [obstacle] happens, then I will [action]."

- Emphasize that this isn't meant to focus on the negative but, rather to prepare us for what might come up.

- Invite one or two participants with strong plans to share their examples in full group. As participants share, affirm specific things about the plans as a way to teach and reinforce this challenging part of the process.

- Celebrate the planning. *Take a moment to imagine that you've completed this goal and write down a reward you might gift yourself as encouragement. Rewards, too, are an important part of the planning process!*

15 min. | Closing: Living the Plan

We've exchanged wisdoms about how to build an effective plan and we've done some hard work developing detailed plans to achieve something we each care deeply about. We would do well to reach out for support as we "live into" these plans. Before we close, find one person – either in this room or reachable by text – who will actively support this plan you've crafted. Ask them now for the support you want. If you can't think of anyone or anything specific, ask me – I'm here to support you.

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BACKWARD MAPPING

Developing a Plan to Achieve My Goal

End Here   **Plan Backward**   Start Here

Resources I Need

List the materials, websites, phone numbers, or documents that you'll need for each step.

Steps to Get There

What are the steps I need to take to achieve my goal?
How long will each step take?

My Goal!

(Draw or insert picture here)

Target date for completion:

_____

Start Here   **Execute (Do) Forward**   End Here
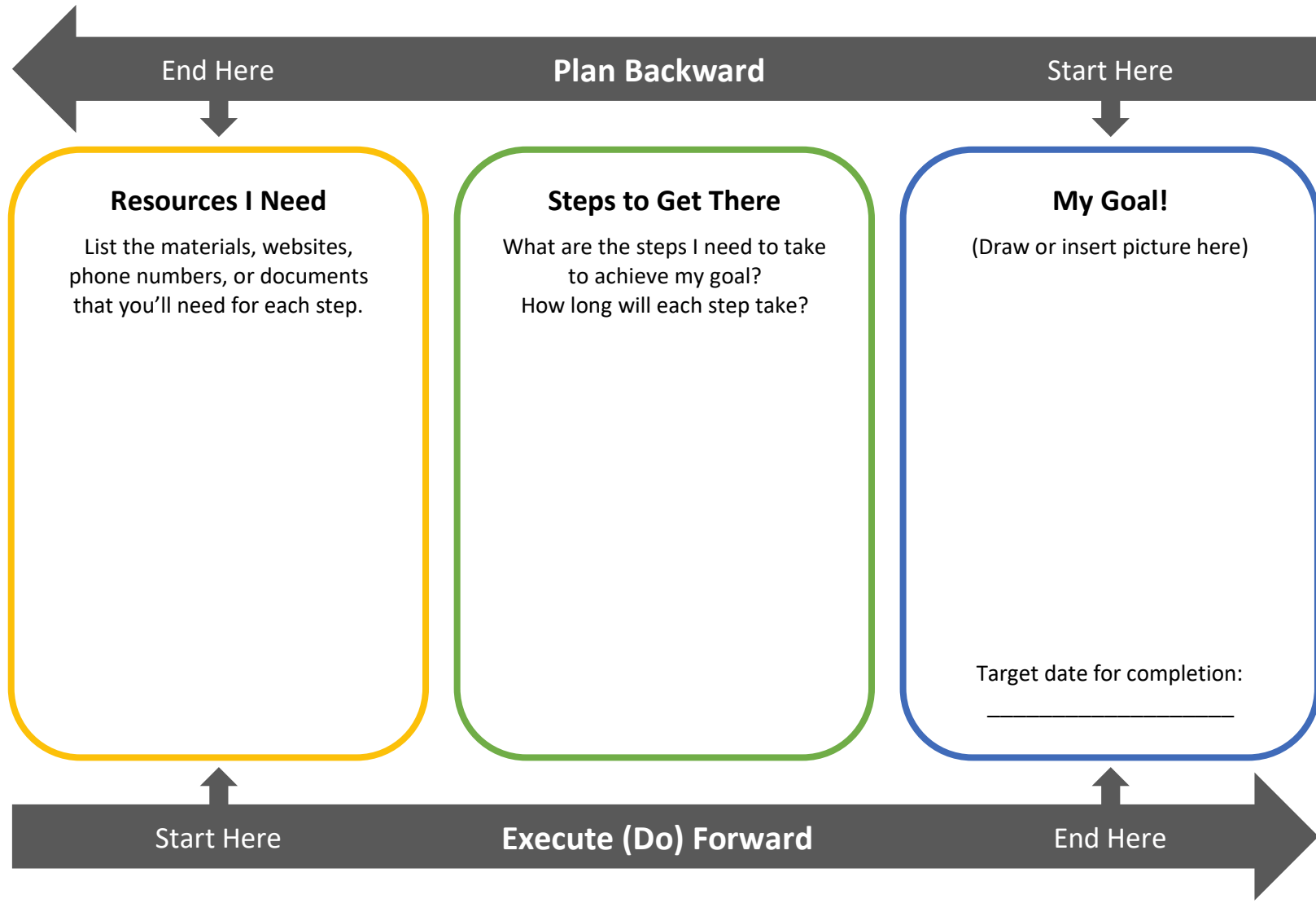
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MY ACTION PLAN (VISUAL)

Name _____ Today's Date _____ Review Date _____

MY GOAL

▶ STEP 1

DETAILS

When I will do it:

What I need to take with me:

Where I'll go and how I'll get there:

▶ STEP 2

DETAILS

When I will do it:

What I need to take with me:

Where I'll go and how I'll get there:

▶ STEP 3

DETAILS

When I will do it:

What I need to take with me:

Where I'll go and how I'll get there:

POTHOLES & DETOURS

WHAT MIGHT GET IN THE WAY?	HOW WILL I RESPOND?
POTHOLE	DETOUR
POTHOLE	DETOUR
POTHOLE	DETOUR

Common Tasks for Planning Exercise

DO A LOAD OF LAUNDRY

WASH THE CAR

PICK CHILD UP FROM SCHOOL

GO GROCERY SHOPPING

PICK UP A PRESCRIPTION

MAKE DINNER

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MAKING GPDR/R A HABIT

Purpose
This activity is designed to help participants get in the habit of using GPDR/R on a regular basis. It focuses on encouraging clients to set very short goals so that it simplifies and demystifies the goal-setting process. It is an ideal exercise to do with participants who have a lot going on in their lives and are unlikely to succeed at setting and achieving long-term goals. Success at achieving small, short-term goals is a way to build the skills, habits and confidence that then allows people to identify and tackle bigger and longer-term goals.

Timing and Frequency
This activity can be done at any time and with any frequency that works given the structure of your program. To help make goal-setting a habit, you could do this exercise at the end of every session. You can use it to get participants thinking about working on goals they want to achieve at home between now and the next session or goals that they'd like to focus on for the next job search group session. You can change the focus so that participants are encouraged not only to think about goals in the context of job search but in all aspects of their life. For example, at the end of a session, you could ask participants to work on identifying a goal related to their children that they can accomplish over the weekend.

Advance Preparation
This activity is short and does not need any advance preparation. You can use it as often as you'd like, including daily. The focus here is on very short-term goals so this is designed as a stand-alone activity.

Tools and Materials
You can do this activity without any tools or materials, but you have the option to use **The GPDR/R Worksheet** which is included after the instructions for the workshop.

The Activity
Invite the clients to sit back and relax for a moment – cutting out all the "noise" in their minds, bodies, or setting[1]. In this quieted space, ask them to think about the next day (from right now to 24 hours from now). (Note: You should keep the timeframe short, but you can expand it beyond 24 hours.)

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[1] You may find it helpful to do a quick mindfulness activity for 2-3 minutes. You can find adaptable ideas at
http://blog.atriushealth.org/2013/04/smart-kids-practice-mindful-eating/

1. **NAME IT.** What is one thing you would like to accomplish in this next day? There may be many things but let one of those surface to the top – whatever it is. What is that one thing that, above all else, you'd like to accomplish within the next day?

2. **CHECK IT.** How strongly do you feel about this goal: Is it something that really matters to you? Is it challenging but something you believe you can accomplish in the next day? Based on answers to these questions, adjust your goal to be something you care deeply about and feel is doable in the next day.

> **FACILITATION TIP**
>
> **Make It about Job Search.** You can adapt this activity to focus explicitly on a job search goal. Instead of asking participants to name something they want to accomplish, ask them to name one goal related to finding a job that they would like to accomplish.

3. **VISUALIZE IT.** What would this goal look like DONE? Picture everything about it. How does it feel to see the goal done?

4. **WRITE IT/DRAW IT.** Write down your goal. Draw it if you'd like. Take the picture in your mind and put it on paper. It doesn't need to be a good drawing- don't let that get in the way. This is for you. Draw your goal done. Put in as much detail as you have in your mind – everything that matters to you – no more, no less.

5. **FEEL IT.** Step back and check what it feels like to see your goal. Is this something that really matters to you?

6. **PLAN IT.** Now, think about what steps you need to take to achieve the goal and any resources you need to have on hand to complete the steps and write them down. Finally, think about one thing that could get in the way and come up with something you can do to overcome it.

7. **SHARE IT.** When you've got a picture of a goal that you care deeply about, and feel that you can achieve in the next day, take a moment to share it with one other person (or with the full group). Name what the goal is – and why this goal matters to you. Hold onto your words or picture – you may carry it with you or post it somewhere as the day progresses.

8. **DO IT.** Get ready to do it! Think about when and where you'll do the plan. Write it down.

9. **REVIEW IT.** Pick a time when and a person with whom you can share your accomplishment. When you talk with them, share how it went and talk about what you learned about yourself.

10. **REVISE IT.** If you don't accomplish what you hoped to accomplish it, take what you learned to heart and try again.

RESUME WORKSHOP: Telling Your Story to Future Employers

Purpose
This workshop uses GPDR/R as a structure for a resume-writing workshop. It aims first and foremost to support participants as they create or refine a resume.

Throughout the process you will model GPDR/R **verbally and in writing** – by telling and showing your own goals and plans for the workshop. In this way, participants both hear and see the full goal achievement process in action.

Finally, the workshop aims to reinforce the routine of setting concrete, short term goals, and following through with that goal until achieved.

Timing and Frequency
This workshop also has two parts, of est. two hours each. The parts can be separated in time by anywhere between one day or two weeks.

Materials and Advance Preparation

CHARTS
- A chart showing the **overview of the workshop**: parts one and two. (See below.)
- Titled charts that you'll complete during the workshop:
    - Goals for Our Resumes

HANDOUTS
- A handout with **Tips for Resume-Writing**. (We do not provide this as we imagine you already have one!)
- **Two examples of strong resumes.** (Again, we do not provide this as we imagine you have many. We suggest you select examples that participants can relate to, and which – despite potential challenges – do a good job of telling someone's personal story.)

TOOLS
- **The GPDR/R Worksheet:** This tool is a place for participants to write down their GPD on Workshop Day One, and their R/R on Workshop Day

OTHER
- Lots of blank paper for drafts, and a bank of computers for a small group of participants to use in workshop part two to enter their resume electronically. (Note: We realize that staff may do this for all or some participants in your program, so adapt accordingly.)

RESUME WORKSHOP	Overview	
DAY ONE	**DAY TWO**
Objectives	
In part one, you will: • Draft or Update a Personal Resume	In part two you will: • Refine your resume and (optional) create an electronic version to share with future employers
Agenda	
10 min. | Getting Started 20 min. | Your Vision of a Good Resume 20 min. | Resume Tips and Examples 60 min. | Create a New Resume (with support) 10 min. | Closing Reflections and Preparation	10 min. | Opening Check-in 45 min. | Finalizing and Getting Feedback 45 min. | Creating Electronic Versions (switch small groups) 20 min. | Closing Exchange

TELLING YOUR STORY TO FUTURE EMPLOYERS | Workshop Day One

Note: Text in *italics* offer suggested language that you can adapt throughout the workshop; text in regular type provides any necessary explanations.

20 min. | Workshop Goal and Plan

GOAL

- *Welcome to the first session of a two-part workshop titled "Telling Your Story to Future Employers." Some people call this our "resume" workshop but we lke this title because we think about your resume as your personal story, told in a way that is of interest to people who might hire you. Our **goal** is that, by the end of this two-part workshop, each of you will have a complete electronic, up-to-date resume that tells your personal story.*

- *You might think that is a lot to accomplish in the time we have, but I'm confident that, together, we can achieve this goal.*

- *What is one personal goal you have for this workshop?* (Hear for everyone and note these on a **chart**: **"Goals for our Resumes"**)

PLAN

*Here is our **plan** for how we will work together for each of you to complete a resume.*

Show the **chart: Workshop Overview** and talk participants through it, with enough detail that they understand the flow.

As we go, I'll check in with all of you to see if we need to make any adjustments to the plan I just outlined. Plans help us to have a roadmap of where we are going but there are often twists and turns in the road so we need to be flexible and change our path if the one we're on isn't working!

What questions or requests do you have about our plan before we begin?

MODELING TIP
At the start of the workshop, explain that each person's goal for this workshop might be slightly different. For example, if someone has never had a resume, they may want to figure out what to include in their resume. Or, if someone is looking for a particular kind of job, they may want to tailor a resume to appeal to that kind of employer.

DO

10 min. | Your Vision of a Good Resume

- **Explain:** *One useful way to think about a resume is that it tells your story. You'll want to tell that story in a way that is accurate, and that highlights your potential for a future employer. Remember, you don't only include paid work experience on a resume but anything that you've done in your life that you believe makes you some am employer would want to hire.*
- **Ask:**
    - *Who would like to share their thoughts on what makes for a good resume?*
    - *What questions do you have about your own resume that you would like to get clear about today?*

20 min. | Resume Tips and Examples

- *As the first step in our plan, we'll review a handout: Tips for Resume-Writing, then we'll look at one or two examples of a strong resume.*
- Distribute the handout and ask what people find most helpful here. Field questions.
- Show one example resume and ask: *What do you find especially strong about this resume? If you were looking for someone to hire, why might you interview this person?*

60 min. | Create a New Resume

Explain; *At this point in our plan, each of you will outline your new or updated resume. The resources we'll need are all available. These include:*

- *Tips for resume writing- and an example to use as a guide;*
- *Blank paper and pencils*
- *Me! (I'll walk around to provide input and guidance. Call me over anytime you want.)* Note: *We're not going to use computers yet today. We'll do that in part two of the workshop.*

What other resources would be helpful for you to accomplish the goal of drafting a new resume?

10 min. | Closing Reflections and Preparation

To wrap up today, let's review by hearing from everyone.

- *What parts of your draft resume are you most proud of? What concerns you?*
- Remind yourself of your personal goal for this resume. *How are you feeling? What additional support do you want?*

Now, let's take a quick look at our plan for part two of this workshop. [Review overview of part two.] How does this look to you?

Before leaving, let's each set a goal to achieve before we get together again. For example, I'm going to give written feedback to each of you on your draft resumes. I'll do that tomorrow morning during my desk time, and turn off my phone so I'm sure to get it done!

Distribute the tool: **GPDR/R Worksheet**. *Using the worksheet, write down one goal you have for now until we meet again. For example, you may want to find out one piece of information for your resume, or contact one person to be a reference.*

As you complete the first part of your GPDR/R worksheet, share it with one other person. I'll walk around and hear them all. Have a great evening!

MODELING TIP
The Closing Reflection of this workshop is a good point to review/revise. But, you can also do this with individuals at any point throughout the workshop. For example: *I'd like to review how things are going for you and make changes as we see fit.* • *What have you discovered so far about creating a resume?* • *How are you feeling about your resume?* • *What's one way you'd like to strengthen it?*

MODELING TIP
As you use GPDR/R yourself, and model it for participants, you'll likely discover that "revise" will lead you back to the top – to a new "goal"! That's very useful, and a great thing to point out to participants. For example, imagine that you have piloted the resume workshop #1 a few times and reviewed the results. You notice that the less confident participants underplay themselves in their resumes. You want to do something about this. So, when presenting the goal to the next cohort, you explain: *In facilitating this workshop over time, I've noticed that some of us are reluctant to highlight our own strengths. My new goal for this workshop is for all of us to leave with a strong resume that captures all our strengths! In turn, I've revised my plan a bit. We'll form pairs and help each other 'draw out' our strengths to include in the resume. How does this sound?*

TELLING YOUR STORY TO FUTURE EMPLOYERS | Workshop Day Two

Note: Text in *italics* offer suggested language that you can adapt throughout the workshop; text in regular type provides any necessary explanations.

10 min. | Opening Check-In

GOAL

*Welcome to the second session of our two-part workshop titled "Telling Your Story to Future Employers." Our **goal** is that, by the end of today, each of you will have a complete resume that tells your personal story in a way that you feel represents you – and your potential – to future employers.*

Distribute everyone's draft resumes with your (encouraging) feedback. Walk around and check in with each person.

Invite everyone to review the **My GPDR/R Worksheet** that they completed during part one of this workshop. As a group, talk them through the review and revise questions. Invite a few volunteers to share:

- *What's something you really want to accomplish in this second part of the resume workshop?*
- *How can we all support you in that?*

PLAN

*Here is our **plan** for today.* Show the **chart: workshop part two overview** and talk participants through it, with enough detail that they understand the flow.

We will use the following resources to complete this part of the workshop:

(1) Our tips and example/s from day one;
(2) Your draft resumes – with feedback from me;
(3) The computers.

As always, I'll check in with all of you to see if we need to make any adjustments to the plan I just outlined.

<table>
<tr><td align="center">**MODELING TIP**</td></tr>
</table>

As you go through the workshop, you may want to consult the group on revising your plan. For example:

> *A number of you seem to be having trouble figuring out how to include volunteer work on your resume. Would it be helpful if we talk about that as a group before we continue? If we do that, we'd need to revise our current plan by trimming the time for our next task by 5 or 10 minutes. What are your thoughts?*

You may also demonsrate how you work around roadblocks to pursue the goal. For example, assume the computers are down the day you planned to have everyone type their resume in the computer:

- *The computers are down so we need to revise our plan for the day. Our goal is to have everyone leave here with a completed resume. Any thoughts on what we should do?*
- *Should we:*
  - *Reschedule the workshop?*
  - *Finish the resumes on paper, take a snapshot and have staff type them up?*
  - *Have everyone go to the library in their neighborhood to use computers there?*

By being transparent about each step of the process, you are helping participants internalize this comprehensive way of thinking about pursuing life's goals.

DO

45 min. | Finalizing and Getting Feedback

Split the group into two. Explain:

- *Group 1 will go to the computer to start to enter their resume;*
- *Group 2 will continue to work on completing their resume*

Later, we will switch groups and Group 1 will get feedback from me on the electronic version of their resume and Group 2 will enter their resume into the computer.

45 min. | Creating Electronic Versions

Switch groups and continue as above. Perodically remind the group of the plan and the time remaining. Ask who feels like they need a support and give lots of encouragement along the way.

If someone is stuck, coach them through the process of taking a break, getting ideas from others, etc.

20 min. | Closing Exchange and Appreciation

- Watch the time so everyone is at an okay stopping point near the end of the workshop.

- Sit in a circle if possible and congratulate everyone on where they've come in this process.

- *Imagine that you have a resume in hand that tells your story for future employers. Imagine that you are ready to send it out – or hand deliver it. Imagine what that feels like.*

- Give a clean copy of the tool GPDR/R worksheet so that participants can use it to set a new goal related to their resume. Their goal can be anything they come up with -- perhaps to complete final touches on the resume - or to ask a friend to review it – or to distribute it to potential employers. Whatever goal they have can do in the top part of the tool – and use the rest, as you have practiced together – to guide them along the path of achieving that new goal!

GPDR/R Worksheet

GOAL • Meaningful • Doable • Little bit challenging	

PLAN • WHAT I'll do • DATE and TIME • WHERE & HOW I'll get there • WHAT I need to take with me	**To Do #1**	**To Do #2**	**To Do #3**

• Plan ahead for things that might get in the way:	**If** **Then**, I will

DO • My supports • Reminders • Stay focused • Check in • Reward for success	

REVIEW/REVISE • What went well • Problems • What I learned • What next?	

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STAFF GUIDES:

FACILITATION AND LEARNING-CENTERED APPROACHES

SUMMARY OF STAFF GUIDES

Five Adult Learning Principles

Summary: Adults learn in their own unique ways. This guide provides five adult learning principles you can use to help participants learn what they want/need to learn.

Facilitation Tips

Summary: Successfully implementing GPDR/R requires assuming the role of a facilitator which may be quite different from the way you currently do your work. Some of us have been trained tell people what they must do and to give them lots of advice on how to fix all the issues they face. Effective facilitation requires us to free ourselves of this mindset and adopt a new one. This guide provides tips on how to be an effective facilitator.

The Role of Facilitation | Inviting Connections

Summary: Creating supportive relationships is a core principle underlying the GPDR/R framework. This guide provides an overview of how you can use your role as a facilitator to help invite connections with participants and build supportive relationships that will provide a strong foundation for implementing the GPDR/R framework.

You can find additional information in Global Learning Partner's shareable resources. They suggest starting with the resource on How a Learning-Centered Approach Differs.

FIVE ADULT LEARNING PRINCIPLES

GPDR/R builds on an approach that we call "learning-centered." This approach **shifts the focus from teaching to learning**. In short, it asks us to think less about what we want to teach or tell people, and more about how we can support them to learn what they want / need to learn. The shift is subtle but powerful. You are probably already using many elements of a "learning-centered" approach without necessarily calling it that!

At the heart of the approach are five core principles. An acronym helps keep these principles top-of-mind: **REACH** | **R**elevant, **E**ngaging, **A**ctionable, **C**lear, and **H**olistic. Below are a few words on each principle, and their relevance in the GPDR/R context.

An Introduction to REACH™ and Its Relevance to GPDR/R

RELEVANT • A relevant participant meeting (individual or group) focuses only on what matters most to participants right now. A relevant meeting uses language and images that participants can relate to. A relevant meeting doesn't include content that doesn't matter to the majority of the learners at this point in their journey.

ENGAGING • In an engaging meeting, participants are not just expected to complete forms or passively listen to a lot of information. Instead, they have ample opportunity to share their own priorities, challenges, and insights.

ACTIONABLE • Effective teaching supports people to take action (i.e., goes beyond "taking in" information to actually "taking action" with that information).

CLEAR • An effective meeting uses language, examples, and directions that are extremely easy for the user to take in, and work with. Plain language and visuals are used throughout.

HOLISTIC • The teaching addresses the learners' head (ideas / thinking), heart (feelings / emotions), and hands (abilities / actions).

REACH™ was developed by and is a registered trademark of Global Learning Partners. You can find additional resources, including more on facilitating group workshops at www.globallearningpartners.com.

Global Learning Partners

FACILITATION TIPS

In this guide, we introduce you to three core facilitation skills -- followed by a series of practical suggestions for facilitators. GPDR/R will be most impactful in the hands of thoughtful facilitation. How you lead the learning in the moment—brings GPDR/R to life. We hope that the core facilitation skills mentioned here resonate with you -- and that the suggestions serve as a reminder of all the effective ways you facilitate learning. As you read this section, reflect:

- *What do you see as your greatest strengths as a facilitator?*

- *What is one thing you really appreciate about your own facilitation approach that is not mentioned here?*

Three Core Facilitation Skills

Listening | It sounds obvious, but listening is one of the most difficult facilitation skills. Authentic listening requires an open heart and focused attention, and that is hard when we are thinking about the clock or the next thing we want to say! Listening involves hearing each person's unique contribution, rather than assuming you know what people will say. *Does your body communicate that you are listening? Do your questions communicate genuine interest and curiosity in what a learner has just said? Do your words demonstrate that they were heard?*

Waiting | All facilitators ask questions. But many also answer their own questions! Typically, when there is silence in a room, facilitators say something to fill the space. But waiting is important. As a facilitator, give people time to THINK before they talk. Waiting creates safety—learners come to know that you will wait for them and it is okay!

Affirming | Participants can feel uncomfortable and unimportant when their comments or questions are met with silence. Affirmation let's people know that their input is truly valued. Affirmation can come in many forms – do it in a way that feels natural for you. Voices are like oxygen to a dialogue approach to learning. They are required for survival! Be especially attentive to affirmation early on in the conversation; learners will be keenly aware of how you receive their first comments.

Practical Suggestions

- Assume a **listening posture**. Sometimes our posture, including having a computer screen or even a desk between you and the participant, creates a distance between you and the participant that is often unnecessary. Think about what position you would most want someone to be in if you were going to have a heartfelt conversation with someone.

- Make it a **conversation** between equals. For example, if you share a story about your own hopes and dreams, tell a true story and keep it short. Modeling what you hope the participant will do will ease their comfort of sharing things that are important to them with you.

FACILITATION TIPS (CONT.)

- Teach with **confidence and credibility**. Adults know immediately if a facilitator is ill-prepared in a process they are leading or lacks first-hand knowledge about a topic. If you don't know the answer to a question, it's okay to say you don't know and you'll find out. This is good facilitation.

- Ask **open questions**, rather than only closed questions, throughout the interaction. Open questions invite people's own ideas and reactions, whereas closed questions have right/ wrong or yes/ no answers. For example, a closed question would be: *Are you ready to sign the form saying you understand the program rules and you are committed to following them?* An open question would be: *Which of the program rules do you think might be most difficult for you and why?*

- Refer to the **participant's previous comments and stories** whenever the opportunity presents itself. For example, earlier, I recall that you mentioned how important your sister is to you; how might she be supportive of you and your plans over the next two weeks?

- Encourage **dialogue and debate**. Wait at least five seconds after asking a question (longer if it is a tough question). Acknowledge divergent points of view, and the courage it takes to bring them forward, even if you disagree. For example, you might say "Thank you for saying what's on your mind and heart. It's a sign that we're creating a safe space here, and that's important to us."

You can find more facilitation tips in the "Facilitation" section of Global Learning Partners' Shareable Resources. We suggest beginning with the resources: 10 Tips for Effective Facilitation and Ensuring Safety in Your Learning Events.

THE ROLE OF FACILITATION | INVITING CONNECTIONS

If we go back to its Latin root, the word "facilitate" means "to make easy." As facilitators, we "make it easy" for people to connect with themselves, with each other, and with the content of the learning. The graphic below is a helpful image to keep in mind when checking both the effectiveness of our work as facilitators. As you consider how to integrate GPDR/R into your work, consider how your approach facilitates participants' connections to themselves, to others, and to the content.

Learning by Inviting Connections
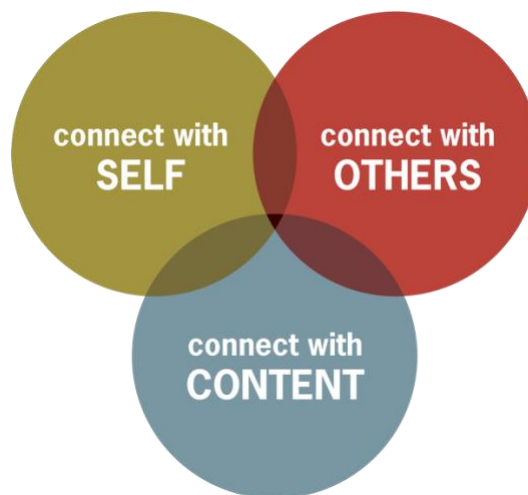
Connect with SELF. Learners need to reflect on their existing knowledge or experience. They need to compare what is being offered to what they already do – and decide if they like it. Whether adult learners show it or not, they are internally weighing what they hear and see, checking for themselves whether they believe it is right and true, and seeing how it feels.

Connect with OTHERS. Learners need to share their stories, experiences, thoughts and questions with other learners. They need to hear what others think and debate it. It is through the pushing and pulling that learners can sometimes discover new meaning and understanding for themselves. It is by holding up a mirror that clarity is sometimes found.

Connect with the CONTENT. Learners need time to examine new content. They need to decide how they feel about it and how it compares to what they already know. If they are learning a skill, they need try it out. Learning is in the doing and deciding, and this takes time.

Source: **Global Learning Partners** (www.globallearningpartners.com)