



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



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

Revised February 2020





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## PREFACE

Executive function skills are essential for success throughout our lives – they are foundational skills that help us focus, make decisions, set goals, control impulses, make and execute plans and revise and adjust plans and goals when necessary. While there is a long history and many resources available for building executive function skills in children, until recently, there has been little attention paid to supporting or building executive function skills in adults. (These skills are also referred to as core adult capabilities or executive skills.) The development of approaches that explicitly focus on building and supporting executive function skills for use in human service and job search programs largely has grown out of efforts by the Center on the Developing Child at Harvard University to elevate the important role that adults play in producing breakthrough outcomes for children. The Annie E. Casey Foundation, wanting to advance the development of this framework for helping adults become successful workers and parents, has funded several initiatives aimed at identifying ways in which employment and related human service programs can use executive function and self-regulation principles and concepts to improve outcomes for parents. In that vein, they have provided the funding for the development of this guide and the companion virtual training for human services staff.

In the development of this manual, we have drawn on the work of many people including: Richard Guare, neuropsychologist and applied behavioral analyst and Peg Dawson, educational psychologist, authors of the *Smart But Scattered* series; Phil Zelazo, a neuroscientist at the University of Minnesota; Lauren Kenworthy, a neuropsychologist and her colleagues at Children’s National Medical Center (Goal, Plan, Do, Check); Sarah Ward and Kristen Jacobsen, speech and language therapists at Cognitive Connections (Ready, Do, Done); Silvia Bunge, a neuroscientist at Berkley; and Gabriele Oettingen, psychology professor at New York University and author of *Rethinking Positive Thinking*.

LaDonna Pavetti, Vice President for Family Income Support at the Center on Budget and Policy Priorities has led development of the Goal, Plan, Do, Review/Revise (GPDR/R) model and the creation of this manual. Valerie Uccellani, Owner and Senior Partner at Global Learning Partners and Megan Stanley, independent consultant, acted as co-creators. Meg Logue at Global learning Partners did the design work for the manual. Michelle Derr and Jonathan McCay from Mathematica have been important thought partners in this work. In the development and multiple revisions of this guide, we have benefited from the insights from a number of partners in the field including Ramsey County Workforce Solutions (Minnesota), the County Welfare Directors’ Association of California (CalWORKs 2.0 initiative), the District 2 TANF Offices in Oregon, the Office of Economic Opportunity and the Brattleboro and Rutland TANF offices in Vermont and NADAP Career Compass in New York City (Manhattan and Brooklyn). Deb Joffe at Public Consulting Group and Terri Feely, independent consultant, provided useful feedback on an early draft.

Many of us who now see human service programs through an executive function lens owe an incredible debt to Richard (Dick) Guare who schooled many of us in how executive skills play out in every aspect of adults’ lives and offered practical solutions for how to integrate strategies to build and support those skills into human service programs.

# A NOTE TO ADMINISTRATORS ON PREPARING FOR ORGANIZATIONAL CHANGE

Redesigning employment and related human service programs using an executive function lens requires approaching service delivery in a new way. Often, the most difficult change is shifting from a compliance-oriented approach where program participants are told what they must do to a participant-driven approach where services are oriented towards helping participants identify and achieve goals that are meaningful to them. The shift away from compliance requires staff to act as coaches or facilitators rather than as compliance officers. Doing this work well also requires that program administrators and staff recognize the toll poverty, racism and other forms of oppression takes on adults' executive function and self-regulation skills.

Key steps organizations can take to create an environment that supports the shift to an executive function-informed approach to service delivery include the following:

## Organizational Issues

- Create a welcoming and calm environment.
- Streamline and simplify processes.
- Clarify how staff will describe the program to participants.
- Clarify staff expectations, especially if enforcing work requirements is a part of their responsibilities.
- Identify and address policies and/or procedures that conflict with a goal achievement approach.
- Train staff to be coaches or facilitators, not compliance officers.
- Provide ongoing support to staff as they work to build supportive relationships that activate participant motivation and commitment to change.

## Program Design Issues

- Create realistic expectations for program participants.
- Identify strategies for modifying participant tasks to reduce the demand on individuals' executive function skills.
- Put processes in place to address issues that impair executive functions such as stress, lack of connections and lack of exercise.
- Create routines within the program that help individuals to set goals and prioritize how to deploy their attentional resources to achieve them.
- Design programs to provide opportunities for participants to practice using and build their executive function skills in real-life situations.
- Reduce the toll poverty takes on individuals' executive function skills by reducing the amount of scarcity families experience by providing income support and transportation, childcare, and housing assistance to help families meet their basic needs
- Address structural racism and oppression by creating environments that support, rather than hinder, individuals' pursuit of their personal goals.



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# CHAPTER 1: INTRODUCTION

## Background

Recent advances in our understanding of the core capabilities that lead to adult success have encouraged the development of new approaches for organizing and delivering human service programs. Key components of these core capabilities are executive function and self-regulation skills – foundational skills that help us focus, make decisions, set goals, control impulses, make and execute plans and revise and adjust them when necessary. These skills begin developing early in life, but are malleable into adulthood. We draw on these skills when we set and achieve goals that are meaningful to us.

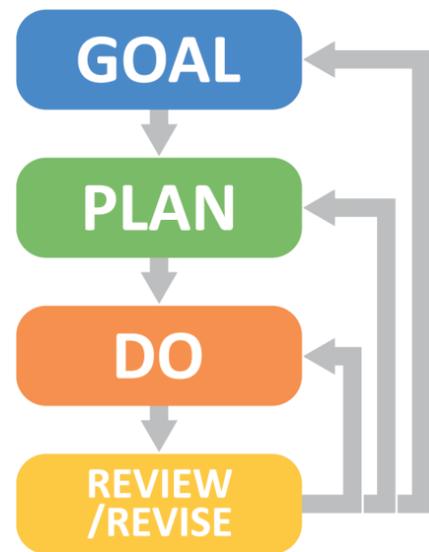
Many stress factors, like living without enough resources to make ends meet, can compromise these skills and growing up in highly stressful environments can impact their long-term development. The good news is that we can design programs to build on individuals’ strengths and compensate for weaknesses while simultaneously providing opportunities to strengthen skills over time through practice, practice and more practice.

This guide takes practical solutions developed by executive function experts for use primarily in schools and adapts them for use in employment and related human service programs focused on serving adults. We have integrated various approaches into one comprehensive adaptable multi-step framework – Goal, Plan, Do, Review and Revise (GPDR/R) that makes explicit the steps that lead to successful goal achievement.

## The Purpose of this Guide

This guide provides guidance for how human services staff can integrate the GPDR/R framework into existing programs, with a special emphasis on employment assistance programs. It is designed to introduce human services staff to science-informed practices that lead to successful goal achievement and provide concrete ideas for how to integrate those practices into existing programs. The strategies presented here can be used in individual meetings or group settings.

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. As the figure at the top of this page shows, each step builds on the last and leads to the next. For many programs, this process will seem familiar – and it is. What an executive function lens gives us is a more intentional and explicit way of guiding participants to successfully achieve their goals – and a greater recognition of the executive function skills used in each step along the way.



## The Structure of this Guide

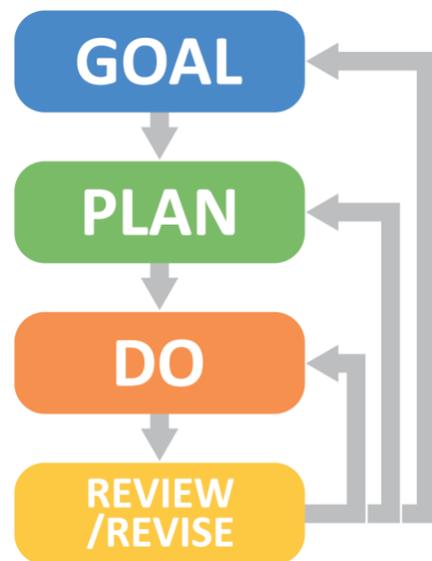
This guide is designed to provide the following: (1) background information that will help you understand the link between goal achievement and executive function skills; (2) a specific (but adaptable) approach to goal achievement that builds on what we know about the factors that increase the likelihood that individuals will successfully achieve their goals; and (3) specific tools that you can use to implement the framework. Two additional volumes provide more materials. The Group Activities Guide provides example workshops you can implement GPDR/R in group settings. A Supplementary Materials volume provides additional materials to address common issues that often arise when guiding and supporting participants through a structured goal achievement process and also provides examples of different designs for forms that support a goal achievement-oriented approach to service delivery. You can find all of the guides and an online training course at the GPDR/R website: [www.gpdrr.org](http://www.gpdrr.org).

Table 1-1 below provides a roadmap to the materials presented in the remaining chapters of this guide:

TABLE 1-1: GPDR/R GUIDE OVERVIEW	
MAIN GUIDE	
<b>CHAPTER 2</b>	Introduction and overview of GPDR/R and a description of what makes this framework different from current practice
<b>CHAPTER 3</b>	An introduction to executive function skills and why they matter for goal achievement.
<b>CHAPTER 4</b>	Guidance and key tools for implementing each component of the GPDR/R framework
COMPANION MANUALS	
<b>SUPPLEMENTARY MATERIALS</b>	A series of staff guides for addressing common challenges, alternative designs for forms and tools, and guidance for administering the Executive Skills Profile
<b>USING GPDR/R IN GROUP ACTIVITIES</b>	Examples of how GPDR/R can be applied in a group setting, including sample workshops and guidance for facilitators

## CHAPTER 2: PREVIEW: GOAL, PLAN, DO, REVIEW/ REVISE

**Goal, Plan, Do, Review and Revise (GPDR/R)** is a multi-step goal achievement framework that, *if practiced regularly and with fidelity*, will make setting and achieving goals easier – and more effective. If practiced enough, it can also help to build key executive function skills necessary for adult success. We will explore executive function skills more deeply in the next chapter, but in short, they are skills we use and need for future-oriented endeavors as well as everyday tasks that rely on planning, self-control, and monitoring skills. In addition to directly building skills, GPDR/R is designed to facilitate the development of supportive relationships and reduce stress, both of which play an important role in the development and use of executive function skills.



The steps of GPDR/R always happen in the same order:

- **Goal:** Set a goal – something we want to accomplish and is within our reach
- **Plan:** Create a roadmap and action plan for how to achieve the goal and identify obstacles and solutions
- **Do:** Put the plan into action
- **Review & Revise:** Look back and assess progress; make a new plan for moving forward or set a new goal if the current one no longer feels like the “right” one

The GRDR/R approach to goal achievement focuses on the importance of facilitating a process that helps participants:

- **look to the future** to identify something they want to accomplish that is meaningful to them – something that will motivate them to make use of the resources your program has to offer – and
- helps them to **create a path forward** that maximizes their chances of success.

Creating that path forward requires helping participants visualize the future while also assessing their current situation to identify what steps they need to take to get to where they want to go and to plan ahead for what might get in the way. It recognizes that achieving our goals is not a linear process – it takes time and there will be inevitable setbacks along the way.

GPDR/R intentionally builds on processes that employment and other human service programs already do every day, but approaches those processes differently. Key differences from regular practice include the following:

- Staff act as **facilitators, helping participants to set goals that are meaningful to them** and within their reach.

- Goals are broken down into *small steps* that are achievable within the time available.
- *Detailed action plans* identify when, where and how each task will be completed.
- *Participants* (not staff) *identify potential obstacles and strategies for overcoming them* before they occur.
- *Ongoing support* is provided when participants are putting their plans into action.
- Regular meetings are *intentional and purposeful and focus on reviewing and revising goals and plans.*

Effective implementation of GPDR/R rests on the following: (1) creating and supporting responsive relationships; (2) strengthening core life skills; and (3) reducing sources of stress. (See Table 2-1.)

**TABLE 2-1: EFFECTIVE IMPLEMENTATION OF GPDR/R**

**Create and Support Responsive Relationships**

- Start with the future, not the past. Help participants explore: What are your hopes and dreams? What can we do to help you identify and achieve them?
- Put the participant in control: they decide what matters to them, what they want to achieve
- Act as a facilitator – provide guidance; help participants identify their own priorities and solve their own challenges
- Continue to provide support when participants are putting plans into action; encourage teamwork

**Strengthen Core Life Skills**

- Embed common goal achievement processes and language across all program components; use consistently
- Model goal achievement processes whenever possible
- Provide guidance to help participants break tasks down into small steps
- Help participants develop and write down detailed action plans
- Help participants identify and develop solutions to obstacles *before they occur in the context of what they want to achieve*
- Help participants monitor their behavior and actions and make adjustments based on what they learn

**Reduce Sources of Stress**

- Provide resources to help participants meet their basic needs
- Set realistic expectations
- Celebrate every success, no matter how small
- Reduce program complexity and smooth the path to success whenever possible

## CHAPTER 3: GPDR/R + EXECUTIVE SKILLS

### Introduction

Executive function skills – also known as adult capabilities or executive skills – are a set of skills that we use to set and achieve our goals. They play a significant role in determining whether we succeed at school, parenting and work. Because goal achievement is effortful work, it places significant demands on our executive skills. We can increase the chances of successfully helping our participants achieve their goals by reducing the demands on their executive skills and building them through practice. We can reduce the demands on executive skills by modifying the environment (e.g., changing expectations so they align with individuals’ executive skill strengths and weaknesses) or by modifying tasks to make them easier (e.g., reducing the steps it takes to obtain child care, helping people to fill out complicated forms, etc.). We can also reduce the demands on executive skills by creating routines – like GPDR/R – that participants can use over and over again. Through repeated practice, routines require less and less effort – and they build skills in the process.



### Executive Skills: What They Are and Why They Matter

A growing body of research highlights the important role that executive skills play in helping adults achieve success in the workplace and at home.<sup>1</sup> They are the skills that help us to carry out day-to-day tasks and achieve life goals that are important and meaningful to us. They are the skills that help us plan, control our responses to others and situations we encounter and monitor our actions. They also are the skills that we use to remember important information and follow multi-step processes or instructions. Executive skills begin developing in early childhood and their natural development ends at about the mid-20’s. However, they can be improved through practice and use throughout adulthood – and even into old age.

This introduction is intended to highlight the important role executive skills play in goal achievement, but you do not need to become an expert on executive skills to effectively use GPDR/R. By implementing GPDR/R, you are encouraging the use of executive skills, creating an environment that recognizes how easily these skills are taxed, providing support when they are weak, and building them through practice.

<sup>1</sup> Center on the Developing Child at Harvard University (2016). *Building Core Capabilities for Life: The Science Behind the Skills Adults Need to Succeed in Parenting and the Workplace*. Retrieved from [www.developingchild.harvard.edu](http://www.developingchild.harvard.edu).

## What are Executive Skills?

While there isn't one standard definition of executive skills, most researchers agree they are a set of cognitive skills that help us organize and manage our resources and set and achieve goals, making them essential for adult success. As a starting point for understanding how we can use executive skills concepts and principles to enhance the work of employment and other human service programs, we consulted with Dr. Richard Guare, a neuropsychologist and certified behavior analyst who has written numerous books on executive function with his co-author, Peg Dawson.<sup>2</sup> (Guare and Dawson use the term "executive skills" rather than executive function skills in their work. Because we draw so heavily on their work, we often use their terminology in this guide.) Their work draws on years of developing and implementing practical strategies to help children, adolescents and young adults with executive skill weaknesses to successfully set and achieve their goals.

Broadly speaking, the 12 skills that are the focus of Guare and Dawson's work fall into three broad categories (See Table 3-1):

- **Planning.** Planning, organization, and time management are a set of related skills that help us to create a roadmap to get from where we are to where we want to go.
- **Self-control.** We rely on our self-control to follow the roadmap to get to where we want to go. Self-control requires consciously directing our actions and behaviors towards the future while controlling our automatic responses (such as fight or flight) which might take us off course. When we lack the resources we need to meet our basic needs, we tend to be very present-oriented, making it difficult to exert the self-control necessary to achieve future-oriented goals.
- **Monitoring.** Regularly assessing our behavior is what allows us to learn from our experiences and to make adjustments if things are not going the way we would like.

When integrating an executive skills focus into human service programs, it is important to keep the following in mind:

- All of us have executive skill strengths and weaknesses.
- Not all people who have lived in poverty have weak executive skills (and sometimes they have very strong executive function skills because living on little often requires exceptional planning and flexibility).
- Ongoing inequities based on race, ethnicity, gender, age, and social standing may tax these skills and make successful goal achievement more difficult.
- When providing guidance and support, it is important to build on strengths while simultaneously providing support to overcome the negative impact of weaknesses.

If you would like to learn more about your own executive skills and consider helping participants to identify their executive skills strengths and weaknesses, you can use the Executive Skills Profile which is included in the Supplementary Materials document.

<sup>2</sup> For example, see: Peg Dawson and Richard Guare. *The Smart but Scattered Guide to Success*. New York, New York: The Guilford Press, 2016.

**TABLE 3-1: EXECUTIVE SKILLS DEFINED**

<p><b>PLANNING AND PRIORITIZATION</b> </p> <p><b>Deciding what steps to take.</b> The ability to create a road map to reach a goal or to complete a task. It also involves being able to distinguish what is and is not important.</p>	<p><b>TASK INITIATION</b> </p> <p><b>Getting started without delay.</b> The ability to begin projects without undue procrastination, in an efficient or timely fashion.</p>	<p><b>STRESS TOLERANCE</b> </p> <p><b>Managing your stress.</b> The ability to work in stressful situations and to cope with uncertainty, change, and performance demands.</p>
<p><b>ORGANIZATION</b> </p> <p><b>Knowing where I put things.</b> The ability to create and maintain systems to keep track of information and materials.</p>	<p><b>RESPONSE INHIBITION</b> </p> <p><b>Seeing the consequence before I say or do something.</b> The capacity to think before you act – the ability to resist the urge to say or do something immediately allows us the time to evaluate a situation and how our behavior might impact it.</p>	<p><b>WORKING MEMORY</b> </p> <p><b>Remembering what I did and what I need to do.</b> 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.</p>
<p><b>TIME MANAGEMENT</b> </p> <p><b>Know about how long a task will take and what the deadline is.</b> 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.</p>	<p><b>EMOTIONAL CONTROL</b> </p> <p><b>Keeping my cool even when frustrated.</b> The ability to manage emotions in order to achieve goals, complete tasks, or control and direct behavior.</p>	<p><b>METACOGNITION</b> </p> <p><b>Evaluating how you're doing.</b> The ability to ask "How am I doing?" or "How did I do?" The ability to learn from past experiences and to build on them.</p>
<p><b>SUSTAINED ATTENTION</b> </p> <p><b>Paying attention, even when I don't feel like it.</b> The capacity to maintain attention to a situation or task in spite of distractibility, fatigue, or boredom.</p>	<p><b>GOAL-DIRECTED PERSISTENCE</b> </p> <p><b>Sticking with a goal.</b> The capacity to have a goal, follow through to the completion of that goal, and not be put off or distracted by competing interests.</p>	<p><b>FLEXIBILITY</b> </p> <p><b>Going with the flow, accepting change.</b> The ability to revise plans in the face of obstacles, setbacks, new information, or mistakes. Adapting to changing conditions.</p>

TABLE KEY:  **Planning Skills**  **Self-Control Skills**  **Monitoring Skills**

## *The Relationship between Executive Skills and Goal Achievement*

Executive skills are important because they are the skills we need to direct our behaviors to achieve our goals. By better understanding the link between executive skills and goal achievement, we can more effectively target our limited resources to activities and actions that will best support program participants in setting and achieving their goals. As Table 3-2 shows and the information provided below illustrates, we use different skills at each phase of the goal achievement process.

<b>Table 3-2: The Relationship Between Executive Skills + Goal Achievement</b>	
<b>GPDR/R Component</b>	<b>Executive Skills Most Relied Upon</b>
<b>GOAL</b>	Metacognition, working memory
<b>PLAN</b>	Planning/prioritization, organization, time management, working memory
<b>DO</b>	Task initiation, response inhibition, time management, sustained attention, working memory, flexibility, organization, persistence, stress tolerance, emotional control, cognitive flexibility
<b>REVIEW / REVISE</b>	Metacognition, working memory, flexibility

- **GOAL:** Setting goals involves evaluating current and past experiences to make plans for the future. We use working memory to remember past experiences and metacognition to evaluate those experiences. That’s what helps us to come up with goals that are meaningful – we avoid things that we don’t like and do more of what motivates us to move forward. Successfully helping a participant identify a meaningful goal requires helping them identify what matters most and what successes and strengths they can draw upon to maximize their chances of success.
  
- **PLAN:** Our planning and prioritization skills are what help us to break goals down into the small steps. We use our organization skills to gather the resources we need to complete a task and to keep them in a place where we can find them. We use time management skills to help us estimate how long a task will take and to decide when we will do it. We draw on working memory to identify what else we need to do and to remember the steps so we can prioritize them. One of the most important things we can do when working with participants is to help them break big goals down into small steps that allow them to experience success from the very beginning of the process.

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- **DO:** Executing a plan draws on many executive skills, most of which involve practicing self-control to direct our behavior in a purposeful way. Task initiation allows us to get started on a task (even if it is unpleasant). Time management allows us to wisely use the time we have available. Response inhibition allows us to avoid distractions and stay focused on the task at hand. Sustained attention helps us to stick with a task until it is complete. Goal-directed persistence helps us to complete each step along the way until we've reached our goal and to stick with the goal even when the going gets rough. Stress management helps us to not get too overwhelmed when faced with competing demands and to proactively identify ways to reduce the stress in our lives. Emotional control help us to keep our emotions in check. When we encounter stumbling blocks, it is cognitive flexibility that allows us to problem-solve to keep us on track. Much of the responsibility for doing a plan lies with the participant, but providing reminders and support and encouragement can do a lot to help them stay focused on what they are trying to accomplish.
  - **REVIEW & REVISE:** When reviewing our progress towards a goal, we once again draw on working memory and metacognition skills which help us to remember what we did (or didn't do) and why and assess what did and didn't work. When revising a goal, we also draw on cognitive flexibility as that is the skill that allows us to abandon goals that are too hard or no longer meaningful to us and come up with new goals – or to develop a new plan if the previous one didn't produce the results we wanted. We also draw heavily on metacognition because we are digging deeper into what matters to us and using it to plan for the future. We often don't take the time to review with participants what they accomplished and to help them decide what they want their next steps to be, but it is a critical step in the goal achievement process.

## Context Matters: How Living in Poverty Impacts Executive Skills

The development of and our ability to access and use our executive skills are influenced by the context in which we live our lives. The impact of poverty on adults' executive skills begins in early childhood and continues into adulthood. Understanding how poverty impacts the development and use of executive skills provides important insights into why goal achievement can be so challenging for many human service program participants and helps to identify why using an executive-function informed approach to goal setting may lead to better outcomes. Here are four avenues through which poverty can impact executive skills:

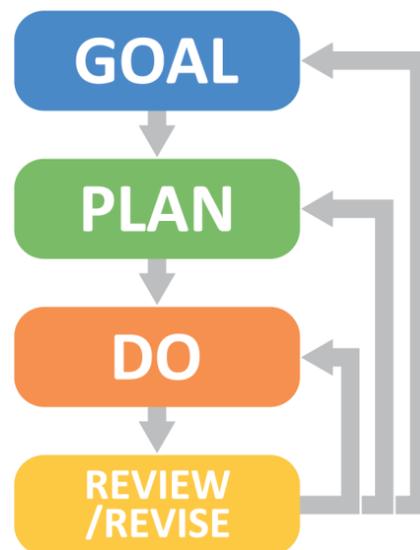
- **Exposure to high levels of stress in childhood.** Children living in poverty are exposed to high levels of stress caused by not having enough to eat, not having a stable place to live, or being exposed to violence, for example. When children experience too much ongoing stress – commonly referred to as toxic stress—it changes their brain architecture which impairs the development of executive skills. This, in turn, can have a lifelong impact on their health and economic outcomes as adults.
- **Living under conditions of scarcity – the “bandwidth” tax.** Living without enough resources to make ends meet – under conditions of chronic scarcity—imposes a “bandwidth tax” which reduces the cognitive resources individuals have available to devote to activities aimed at achieving long-term goals. Sendil Mullainathan and Eldar Shafir, authors of *Scarcity: Why Having Too Little Means So Much*,<sup>3</sup> note that when people live in a state of chronic scarcity, they have a tendency to “tunnel” which causes them to focus on the here and now. This reduces individuals' capacity to think logically, solve novel problems, and process information. It also diminishes their ability to evaluate options to make high quality decisions and impairs their self-control which can cause them to act impulsively.
- **Increased exposure to racism, and oppression that compromise executive skills.** Racism and oppression place undue burdens on individuals that compromise their ability to maximize their full potential. On a day-to-day basis, living in poverty puts individuals at greater risk of experiencing situational factors that impair their executive skills.
- **Added complexity of accomplishing common adult tasks.** Limited transportation and child care options, constantly changing work hours and schedules, unstable pay, and complicated processes for obtaining and maintaining public benefits all require highly developed executive skills. It takes much greater planning, organization and time management skills if you have to get your kids to daycare and yourself to work via public transportation than via a car, for example.

<sup>3</sup> Sendil Mullainathan and Eldar Shafir. *Scarcity: Why Having Too Little Means So Much*. New York, New York: Time Books, Henry Holt & Company, LLC. 2013

## CHAPTER 4: PUTTING GPDR/R INTO PRACTICE

### Introduction

GPDR/R is an approach, not a program, which means that it can be integrated into any human service program. But, putting GPDR/R into practice requires that we do our work differently. In particular, it requires that we let participants drive the process and that staff take on the role of facilitator – helping participants to identify what matters to them and helping them to see how they can use the program resources to reach (or come closer to reaching) their goals. In piloting this work, staff reported that, when asked what their goals were, participants often responded by saying that no one had ever asked them that before. Doing this work requires more listening and less telling people what to do.



In this chapter, we provide key concepts for implementing each component of GPDR/R effectively. At the end of this chapter, we include resources you and participants can use to remind yourself of the core concepts for each of the steps of GPDR/R and an example of forms you can use to integrate GPDR/R into your day-to-day work. More detailed tips and additional examples of forms can be found in the companion Supplementary Materials document.

### GOAL: Looking to the Future

Goal setting is at the heart of many employment and human service programs. It is the process of identifying something we want to achieve so that our actions can be directed to that aim. Setting goals anchors us to the future, building the motivation that gives meaning and purpose to each of the steps we need to take to get where we want to go. In short, goals are what give direction to our actions – and to our lives.

Human service workers play a key role in creating relationships that activate client motivation and the commitment to change. Program staff act as facilitators, guiding program participants through a process of self discovery, resisting at every turn the urge to set goals for participants and to tell them how to achieve them.

#### YOUR ROLE AS A FACILITATOR

- Guide participants to a heartfelt, achievable goal
- Guide participants to imagine what success looks and feels like

## Key Concepts for Effective Goal Setting

Setting goals is about imagining what we want our future to be. To that end, effective goal-setting is a mixture of both science and art. The science tells us the best way to identify goals that we have the greatest chance of achieving: they must be meaningful and achievable. But, every individual is different. The art of goal setting is about helping people to get to a meaningful goal that is challenging, but feasible. It is about figuring out how to help participants look to the future and find something that matters enough to motivate them to put out the effort required to achieve it.

Here is a summary of the characteristics of goals that have the greatest chance of being achieved:

- **Personally meaningful and motivating.** When we come up with our own goals, we are more likely to be motivated to stick with them to the end. If they are not meaningful to us, we will abandon them when the going gets rough. To build motivation, we need to look into the future and imagine how we will *feel* when we achieve our goal.
- **Within our control.** Even though we can only control so much in our lives, often we set goals that are outside of our control – and encourage others to do the same. For example, “get a job” is dependent on things like our skills and experience, the economy and where we live. An *in-our-control* employment-related goal would be something like “apply to five jobs at nursing homes I can reach by public transportation.”
- **Challenging, but feasible.** If goals are too easy, they are not motivating enough for us to stick with them. If they are too hard, we abandon them out of frustration.
- **Specific.** We are more likely to achieve our goals if they are specific, which means that we have a clear target for which we are aiming. “I want to get a job” is a vague goal. “I want to apply to five jobs within 15 minutes of my house by the end of the month” is a specific goal.

### PLAN: Creating a Roadmap for Change

Human services staff can help participants become really good planners – a critical skill that is at the core of successful goal achievement. A well-crafted, detailed plan works as a self-control device; research shows that individuals are much more likely to follow through with a task (which often means ignoring competing demands) if they have written down the details and have identified and thought through how they will respond to obstacles *before* they occur. Staff can simplify the planning process by thinking through the steps ahead of time for common tasks.

#### YOUR ROLE AS A FACILITATOR

- Model and teach how to develop an effective plan
- Help participants to write down the details: what, when, where, how, what to take
- Practice planning as often as possible
- Help participants identify obstacles and solutions
- Develop ready-made plans for common tasks

## Key Concepts for Effective Planning

The task of creating a roadmap to reach a goal, making decisions about what is most important, estimating how long each step will take, thinking ahead about what could go wrong requires a lot of effort. A good plan can significantly reduce the demand on a participant's executive skills thereby increasing the chance that they will complete the plan.

Key to helping participants develop strong planning skills is developing a systematic approach to planning and using it over and over again. Participants who experience a repeated process are more likely to use it on their own. Key concepts for effective planning include the following:

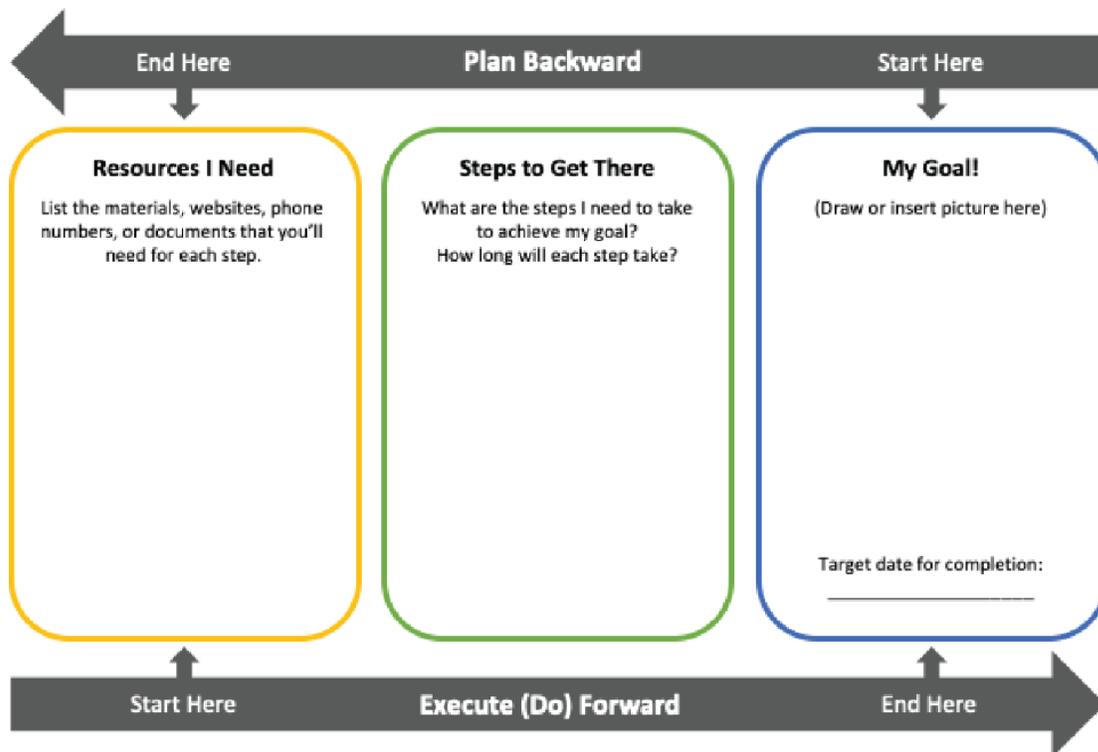
- **Start with the goal.** Meaningful goals are what motivate us to take the steps necessary to achieve them, but planning is what makes them real. When making plans it is important to show how each step links to the goal. A key role for staff is helping participants see how program resources (and requirements) can help them reach their goal.
- **Break bigger goals into small, manageable steps.** Achieving long-term goals can seem like an impossibility. One way to make them not seem so far off and complicated is to break them down into small, concrete steps. The ideal is for a participant to be working on no more than three steps at any given time.
- **Identify the resources needed to complete the plan.** Effective plans not only identify the steps we need to take, but also the resources we need to be successful. For example, to apply for subsidized child care, program participants need a copy of their child's birth certificate. Making sure they have the birth certificate before they complete the application can save time and avoid frustration.
- **Focus on the details.** Effective plans not only identify next steps, but also include the details of how those steps will be completed, including how long it will take, when and where it will be done, how to get there, and what resources to take. Plans also are more effective when they are written down.
- **Identify what might get in the way and what to do to stay on track.** Any number of things can get in the way of us successfully achieving our goals. Research shows that if we identify those things ahead of time and come up with a plan for what we will do if they get in our way, they are far less likely to derail us.
- **Create ready-made plans for common tasks** to reduce the planning burden on participants. This immediately reduces the cognitive demands on a participant, freeing up limited resources to complete tasks that can help propel them forward.
- **Complete some steps together.** This can cut down on the burden for the participants, while also giving them a model of how to get started on tasks that may be difficult for them.

## Three Steps for Creating Effective Plans

### Step 1: Break Big Goals into Small Steps

Backward mapping is a process you can use with participants to help them break big goals down into smaller steps. It is called backward mapping because you start with the goal as the end point and work backward to figure out how to get there. The two key components to backward mapping are identifying the steps to achieve the goal and identifying the resources (e.g., documents) the participant needs to complete the steps.

You plan backward and execute forward. (More detailed instructions for doing backward mapping and an example can be found in the Supplementary Materials document.)



### Step 2: Make the Plan Actionable

Making a plan actionable involves creating a detailed action plan for the steps that will be completed in a specified time period (e.g., the next week or month). Good planning also involves walking through the action plan with the participant, having them visualize the steps and identifying when/where/how they will complete them. It is important that staff works through the plan *with* the participant, but does not do the planning *for* them. At the end of this chapter, you will find an example of a form you can use with participants to develop detailed action plans. Additional examples of forms can be found in the Supplementary Materials volume.

### Step 3: Identify Obstacles and Strategies for Addressing Them

An important part of developing an effective plan is anticipating obstacles and developing contingency plans to address them. This puts responding to obstacles on “auto pilot” rather than crisis response. It’s also important to note what constraints are within a participant’s control and what supports the program can provide, with a focus on compensating for executive skills that might be weak. A useful way to prepare to address obstacles that might get in the way is to develop If, then plans. **If** [obstacle], **then** I will [action].

### DO: Put the Plan into Action

Executing the plan for our goal is when we move from *intention* to *action*, and it is when participants often have the least amount of direct support – and the greatest chance to fail. Programs can set participants up for success by creating detailed plans, thinking through potential obstacles and strategies for addressing them, and rehearsing plans before they are put into practice. The responsibility for “doing” the plan rests primarily

#### YOUR ROLE AS A FACILITATOR

- Create realistic expectations
- Simplify tasks to make them easier
- Teach participants to set reminders
- Anticipate obstacles
- Rehearse difficult situations
- Provide time to teach and practice skills needed to successfully execute plans

with the participant, but you can still help to increase the chances of success. Doing the plan is all about self-control – it is about directing one’s behavior towards achieving one’s goals – and that means not getting derailed by all the things that can easily distract us from staying focused on what we are trying to achieve.

### Key Concepts for Supporting Participants as They “Do” Their Plan

The “Do” phase of the GPDR/R framework asks people to draw on many of their executive skills and also is the step with the least direct support. While staff often are not with participants when they are executing their plans, there are several concepts programs can keep in mind:

- **Design programs to minimize the burden on participants.** Programs can be redesigned to make tasks easier (fewer steps, centralized locations, etc.) and reduce the demand on participants’ time, resources, and mental energy (having meetings in the same place each time on a regular schedule).
- **Provide direct support.** Programs can help participants identify areas where they are most concerned about not being able to successfully complete their plan and provide direct support and encouragement in overcoming those. For example, if a participant often struggles with remembering to get to meetings on time and that is an integral part of his/her plan, staff may provide reminders about the meeting or help set up automatic reminders in an app on a participant’s phone.

- **Recognize the importance and power of “small steps.”** We often expect participants to accomplish complex tasks (e.g., participating in work activities for 20 or 30 hours per week) immediately, even while recognizing that they are unlikely to succeed. For individuals who are in crisis or who are facing several challenging situations simultaneously, the best path to long-term success may start with small steps that reduce stress and build the confidence and skills to take on bigger, more challenging tasks down the road.
- **Build participant capabilities.** Since many programs are time-limited, it is important to model and teach skills to participants in a supportive environment, so that when they leave they have built the capabilities they need to set goals and execute plans.
- **Provide opportunities to practice.** Executive skills are built through practice, over time. Programs can design their programs to provide participants opportunities to practice skills. Group workshops and ongoing activities like work experience or subsidized employment provide ideal opportunities for participants to practice executive skills.

At the end of this chapter, we provide a guide that you can use to support participants in five key areas as they do their plans. Some of these strategies aim to provide direct support while participants are doing their plans while others suggest additional ways you can help build participant capabilities before they begin or while they are doing their plans. The five areas and the executive skills represented by each are:

- **Remembering what needs to get done** – working memory
- **Getting started and sticking with it until its done** – task initiation, goal-directed persistence
- **Managing time and staying organized** – organization, time management
- **Managing stress** – stress tolerance and emotional control
- **Avoiding distractions and competing demands** – response inhibition

## REVIEW & REVISE: Looking Back, Moving Forward

Achieving goals is an iterative process. It is not uncommon for us to set our sights on a goal and then decide it’s not the right goal after all. Similarly, our plans don’t always work as expected. It is for this very reason that review and revise are included as explicit steps in the goal achievement process. By including them from the beginning, changes become a regular part of the process and are less likely to be viewed as failures.

### YOUR ROLE AS A FACILITATOR

- Provide an environment that supports changing goals and plans as often as necessary
- Focus on the positive, but recognize when participants’ actions fall short of expectations
- Make reviewing and revising goals and plans routine
- Build in time to regularly assess progress
- Encourage self-reflection



Though reviewing and revising plans often happens during the same meeting, they are separate processes that deserve their own time and attention. When we take a step back to review our progress and to think about what worked well and what we could do differently, we are building critical skills to use throughout the goal achievement process. When we reflect on what we accomplished (or didn't), we develop a better understanding of ourselves which allows us to build on our strengths and develop more effective strategies for overcoming our weaknesses. It is not enough to simply review how we did, we need to use what we learned to keep moving towards something that matters deeply to us. The more you encourage participants to review their progress and make changes when needed, the more likely it is to become a process they do regularly on their own.

### ***Key Strategies for Guiding the Review Process***

We often don't feel we have the time to pause and review what we or our participants accomplished, but it is critical to help us guide participants towards success and to help our participants to assess their own circumstances, actions and behaviors. General "review" questions you can use include the following:

- *Tell me how [the week] went.*
- *What is something that you accomplished that you are especially proud of? What helped you to be successful?*
- *What is something you wanted to accomplish but didn't? What got in the way?*
- *What is one or two key things you learned about yourself that you'd like to keep in mind moving forward?*

### ***Key Strategies for Revising Goals and Plans***

The revise process is critical for helping participants to stay motivated and to keep momentum going. In facilitating the revise process, you will use the information you gathered during the review conversation to help guide the participant to the next step which will depend on what the participant accomplished and whether they remain committed to their original goal (or have accomplished it and are ready to move on to a new goal).

Depending on what you uncover during the review process, the revise step could take one of three paths:

- ***Development of updated action steps.*** If an individual successfully executed their action plan, you want to help them identify the next steps they need to take to make progress towards their goal. This might mean identifying what the next steps are to continue to make progress, or continuing what they are currently working on. In both cases, you are building off of an existing plan that is working as intended.
- ***Development of a new plan.*** If an individual wasn't successful in completing their action plan but they want to stay with their current goal, you want to work with them on developing a new plan. Do they need to take an alternative approach? Do they need



to break tasks down into even smaller steps? Do they need more support or a different kind of support?

- **Identification of a new goal.** Through the review, a participant may also come to the realization that the goal is too challenging, not meaningful enough, or not feasible. In this case, you want to work with them to come up with a new goal, then restart the GPDR/R process. A participant may also reach their goal. In that case, you want to encourage them to set a new goal, possibly one that may be a bit more challenging.

Questions you can use to guide the “revise” conversation include the following;

- *Given what you’ve accomplished and what you’ve learned about your strengths and limitations, how are you feeling about the goal you set for yourself? Does it still feel meaningful to you and within your reach?*
- *What would you like to do next? (Additional prompts: Would you like to come up with a new goal? Go back to your plan and revise it? Move on to the next step on your plan?)*

Once you’ve figured out the direction the participant would like to take, you simply repeat that part of the GPDR/R process and move forward from there.

## CONCLUSION

Practice is key to building executive function skills. The GPDR/R framework is designed to be used in every interaction with participants – repetition is key to building new skills and new habits. By regularly reviewing and using the process, you are helping program participants to identify and achieve their goals while simultaneously building skills that they can use at home and at work. If you work with participants in groups, we suggest you look at the supplementary document that focuses on using GPDR/R in group activities. Groups provide an excellent opportunity to teach GPDR/R to participants and to use it for common tasks like creating a resume that are often taught in a group setting.



# STAFF AND PARTICIPANT MATERIALS FOR IMPLEMENTING GPDR/R





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## GPDR/R Staff Guide

GOAL	
Key Concepts or Steps	<p><b>Characteristics of goals with high likelihood of success</b></p> <ul style="list-style-type: none"> <li>• Personally meaningful and motivating (e.g., why is the goal important to me?)</li> <li>• Within our control</li> <li>• Challenging, but within reach</li> <li>• Specific and achievable within a realistic timeframe</li> </ul>
Conversation Starters	<ul style="list-style-type: none"> <li>• What are your hopes and dreams for the future?</li> <li>• Think about the next month. What is one thing you'd like to do that would make you feel happy – something that is important to you?</li> <li>• What is one thing that you would MOST like to accomplish in the next month?</li> <li>• What matters deeply to you that you could see yourself working towards in the next month?</li> <li>• What keeps you motivated even when things get hard?</li> </ul>
PLAN	
Key Concepts or Steps	<p><b>Step 1: Break the goal down into small steps</b></p> <ul style="list-style-type: none"> <li>• Identify the steps to get to the goal, being as detailed as possible</li> <li>• Identify the resources needed to complete the steps</li> </ul> <p><b>Step 2: Select steps to work on and make a detailed plan for doing them</b></p> <ul style="list-style-type: none"> <li>• Identify the details: what, when, where, how to get there, what to take</li> </ul> <p><b>Step 3: Identify what might get in the way and what to do to stay on track</b></p> <ul style="list-style-type: none"> <li>• Identify obstacles – what might get in the way of success (potholes)</li> <li>• Identify strategies to overcome the obstacles (detours)</li> </ul>
Conversation Starters	<ul style="list-style-type: none"> <li>• Let's work backward and think about what steps you need to take to get where you want to go. What resources will you need?</li> <li>• Let's map out an action plan for steps you can take before our next meeting. Which of the steps would you like to focus on?</li> <li>• For each step, let's talk about what it will take to complete it and write down the plan: Where do you have to go? How will you get there? How long will it take? When will you do it? What do you need to take with you?</li> <li>• Imagine doing your plan. What might get in the way? What can you do if that happens?</li> <li>• How will you reward yourself when you are done?</li> </ul>

## DO

Key Concepts or Steps	<ul style="list-style-type: none"> <li>● “Doing” the plan rests primarily with the participant.</li> <li>● Ways to support the participant to do their plan:             <ul style="list-style-type: none"> <li>○ Do one or two steps of the plan <i>with</i> the participant</li> <li>○ Call or send text or e-mail reminders before each step</li> <li>○ Help participants identify someone to do the plan with them</li> <li>○ Ask the participant to check in with you</li> <li>○ Help put the action plan into a calendar or task list</li> </ul> </li> </ul>
Conversation Starters	<ul style="list-style-type: none"> <li>● Let’s do one step to get you started on your plan before you leave.</li> <li>● How can I support you as you do the rest of your plan?</li> <li>● Would you like me to call, text or e-mail you as a reminder?</li> <li>● Let’s create a reminder system to help you put your plan into action.</li> <li>● It can be hard to do this alone: who might be able to help you?</li> </ul>

## REVIEW / REVISE

Key Concepts or Steps	<p><b>Key Concepts</b></p> <ul style="list-style-type: none"> <li>● We learn by doing</li> <li>● Goals and plans change</li> <li>● Success and setbacks contribute to learning about what matters to us and what our strengths and weaknesses are</li> <li>● When plans fail: try smaller steps, more (or different) support, an alternative approach or identifying a more meaningful goal</li> </ul> <p><b>Step 1: Review of previous plan to assess progress</b></p> <p><b>Step 2: identify where to go next</b></p> <ul style="list-style-type: none"> <li>● If plan successfully completed: development of updated action steps.</li> <li>● If plan not successfully completed: development of a new plan or identification of a new goal</li> </ul>
Conversation Starters	<p><b>Review</b></p> <ul style="list-style-type: none"> <li>● Tell me about your week. What were your major accomplishments? What went according to plan? What strengths did you draw upon?</li> <li>● What got in your way? How did you respond?</li> <li>● What do you wish you had done differently?</li> <li>● What did you learn about yourself?</li> </ul> <p><b>Revise</b></p> <ul style="list-style-type: none"> <li>● How are you feeling about your goal? Does it still feel like something you want to pursue?</li> <li>● What step would you like to take next?</li> <li>● What would help you to move forward?</li> <li>● How can I support you in coming up with a new plan or goal?</li> </ul>

## My Guide to Using GPDR/R

<b>GOAL</b>	<ul style="list-style-type: none"> <li>• Aim for something you truly care about</li> <li>• Consider something that is challenging but within reach</li> <li>• Be specific about what you want to accomplish and by when you'd like to accomplish it</li> <li>• Think about why the goal is important to you</li> <li>• Imagine what it would feel like to achieve the goal</li> </ul>
<b>PLAN</b>	<ul style="list-style-type: none"> <li>• List the steps to get to your goal</li> <li>• Figure out what resources you need to complete the steps</li> <li>• Pick the steps you'll start with (aim for three)</li> <li>• List the details: when (date and time); where; how you'll get there</li> <li>• Identify obstacles – what might get in the way of success (you can think of these as potholes or bumps in the road)</li> <li>• Come up with a plan to overcome the obstacles (detours)</li> </ul>
<b>DO</b>	<ul style="list-style-type: none"> <li>• Share your plan with someone you trust and ask them to check in with you</li> <li>• 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</li> <li>• When you're feeling discouraged, remind yourself why the goal matters to you</li> <li>• Think about what will help you avoid distractions</li> <li>• Check in with your worker if you're having trouble doing your plan</li> </ul>
<b>REVIEW/ REVISE</b>	<ul style="list-style-type: none"> <li>• Review your progress: What did you accomplish? What went according to plan? What strengths did you draw upon? What didn't go so well?</li> <li>• Think about what you learned: What do you wish you had done differently? What did you learn about yourself?</li> <li>• 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.</li> <li>• Come up with next steps: Continue with your current plan or come up with a new one – don't forget the details!</li> </ul>

## GPDR/R Worksheet

<p style="text-align: center; font-weight: bold; font-size: 1.2em;">GOAL</p> <ul style="list-style-type: none"> <li>Meaningful</li> <li>Doable</li> <li>Little bit challenging</li> </ul>			
<p style="text-align: center; font-weight: bold; font-size: 1.2em;">PLAN</p> <ul style="list-style-type: none"> <li>WHAT I'll do</li> <li>DATE and TIME</li> <li>WHERE &amp; HOW I'll get there</li> <li>WHAT I need to take with me</li> </ul>	<p style="font-weight: bold; font-size: 1.1em;">To Do #1</p>	<p style="font-weight: bold; font-size: 1.1em;">To Do #2</p>	<p style="font-weight: bold; font-size: 1.1em;">To Do #3</p>
<ul style="list-style-type: none"> <li>Plan ahead for things that might get in the way:</li> </ul>	<p><b>If</b></p> <p><b>Then, I will</b></p>		
<p style="text-align: center; font-weight: bold; font-size: 1.2em;">DO</p> <ul style="list-style-type: none"> <li>My supports</li> <li>Reminders</li> <li>Stay focused</li> <li>Check in</li> <li>My reward for success</li> </ul>			
<p style="text-align: center; font-weight: bold; font-size: 1.2em;">REVIEW/REVISE</p> <ul style="list-style-type: none"> <li>What went well</li> <li>Problems</li> <li>What I learned</li> <li>What next?</li> </ul>			

## SUPPORT STRATEGIES AS PARTICIPANTS “DO” THEIR PLAN (1)

### Remembering What Needs to Get Done

- **Provide regular reminders.** In addition to participants’ own reminder systems, you can support them by sending reminders – through phone calls, text messages, e-mails or letters. Sending reminders will also send a signal that you are there to support them as they work to achieve their goals.
- **Walk through the action plan at the end of the planning session-** By walking through the plan at the end of the session, you can make sure that the participant is clear about what they need to do and you can take one last opportunity to address any concerns and/or identify strategies to remove barriers that might get in the way. Check to make sure that the participant has the resources they need to do the plan, they know how to get started, the time commitment is reasonable and they feel confident they can complete the plan.
- **Encourage participants to post their goal in a prominent place.** One way to keep a focus on those goals is to ask participants to post them in a prominent place. Another is to revisit them in every interaction you have with a participant.

### Getting Started and Sticking With It Until It’s Done

- **Provide lots of encouragement and feedback.** Job search, applying for benefits, finding child care and related tasks are often stressful. Rejections, or silence, from employers come far more often than job offers. Applications are often long and ask the same questions over and over. It is critical to provide positive encouragement and feedback as often as possible. Recognition for progress or sticking with a task after multiple setbacks are the kinds of situations that are worthy of positive recognition.
- **Encourage teamwork.** The lack of social connections takes a toll on a participants’ ability to use their executive skills to achieve their goals. Taking an active role in encouraging participants to work in pairs or small groups has many benefits. It can reduce social isolation. It adds a positive dimension (i.e., spending time with someone who is on a similar path) to tasks that might be unpleasant or challenging to complete. It also provides a built-in positive peer-focused accountability system.
- **Provide opportunities to practice.** Practice with support can increase participants’ confidence about being able to complete a task. One example is to have participants conduct an independent job search one day a week (ideally on a day other than Monday or Friday) during the structured portion of a job search program. For example, in a 4-week job search program, you might dedicate every Thursday to independent job search. You could then use Wednesday to help participants decide the details of where, when and with whom they will conduct their job search and then use Friday to review how they did. Repeating this every week will help participants to anticipate the kind of problems they might encounter when they shift to looking for jobs on their own and to come up with solutions to address them.

## SUPPORT STRATEGIES AS PARTICIPANTS “DO” THEIR PLAN (2)

### Managing Stress

- **Introduce participants to stress management techniques.** Participants who are living with inadequate resources are under extreme stress which hijacks their attentional resources to focus on their goals. One way to help participants increase their chances of being able to focus on their goals is to help them come up with strategies to reduce stress in their lives. Mindfulness, which takes little time, is one effective strategy that can be implemented in job search programs at little to no cost. Apps like *Calm* can be downloaded for free and offer short mindfulness practices.
- **Help participants reduce their scarcity by ensuring they are receiving all the benefits and supports available to them.** When participants are struggling to meet their basic needs, they are under an incredible amount of stress. Helping them to access the resources can alleviate some of their stress, leaving more cognitive resources to focus on longer-term goals.

### Managing Time and Staying Organized

- **Help participants develop their own reminder systems.** Reminders can help to keep unpleasant or tedious tasks on a participant’s radar screen. You can help participants with smartphones to set up a reminder system using their electronic devices. For those without smartphones, you can help them develop a pen and paper system, using a combination of a weekly or monthly calendar and daily to-do lists.
- **Model and/or teach effective time management.** One way to help participants become better at time management is to explicitly model it in everything you do – and to explicitly teach it if you have the time to do so. In a group setting, modeling means assigning times to tasks that you may do during the day and assessing along the way and sharing with participants whether you allocated too much or too little time to the task.

### Avoiding Distractions and Competing Demands

- **Help participants identify what supports them in a positive way and what derails them.** One way to help participants achieve better self-control is to help them avoid situations that make it difficult for them to exert self-control, including socializing with people who push their buttons or don’t support their efforts to achieve their goals. Another is to encourage them to schedule the tasks they most want to get done at the point in the day where they are least likely to be distracted, for example, immediately after dropping kids off at school.
- **Encourage participants to create a daily plan the night before.** Often the best strategy for avoiding distractions is to plan ahead. Encouraging participants to create a plan every evening for the next day can help them to stay focused.



## ADDITIONAL MATERIALS AVAILABLE IN THE SUPPLEMENTARY MATERIALS VOLUME

### THE ROLE OF FACILITATION: INVITING CONNECTIONS

**Summary:** This resource provides a short introduction on how to think about what it means to be a facilitator. It focuses on thinking about how your work facilitates participants' connections to themselves, to others, and to any content you are delivering to them.

### GOAL STORMING

**Summary:** Participants can use this tool to brainstorm anything they hope or desire to achieve in a given time frame. The program can decide the timeframe (shorter is better) and how to set the focus (whether wishes can be broad or whether they are related to employment, education, etc.). After brainstorming, you can guide participants to select the goal that is most meaningful and challenging but within their reach. This tool is intended to facilitate the process of helping participants get to a meaningful goal. Sticky notes or small pieces of paper can work just as well as (or better) than this form to get participants thinking about their future goals. The advantage of sticky notes or small pieces of paper is that participants won't feel compelled to fill every box. They also can be prioritized more easily if participants have more than one goal.

### TIPS FOR EFFECTIVE GOAL SETTING

**Summary:** This guide provides tips for how to be effective in helping participants to set a goal. You can use this guide as a checklist when working with a participant to identify a goal.

### LIFE AREAS

**Summary:** This tool is intended to facilitate the process of helping participants get to a meaningful goal. Sometimes participants have a hard time thinking of a goal they would like to achieve. This tool identifies different aspects of participants' lives to help spur their thinking. In addition to using it when participants can't think of a goal, you can also use it if you want to encourage participants to think broadly about their goals. You can use the tool with or without the prompts at the bottom. (We added the prompts to provide additional assistance to participants who get stuck finding a goal even when the life areas are identified.) This tool can be used with the Goal Storming tool.

### TROUBLE SHOOTING WHEN GOALS AREN'T EASILY IDENTIFIED

**Summary:** This guide provides tips for how to address different situations that might arise when helping participants set a goal.

### BACKWARD MAPPING

**Summary:** This guide provides detailed instructions on how to do backward mapping and provides an example.

### APPS TO HELP PARTICIPANTS STAY ON TRACK

**Summary:** Even with the most detailed plans, it can be hard to turn our intentions into actions. While facilitators can give reminders and support along the way, it's sometimes helpful to have some apps handy on your phone/tablet/computer that keep participants going when it's time to put that plan into action. This is a list to get you started.

### MY GOAL SUCCESS PLAN

**Summary:** This is an alternative form that you could use to help guide participants through the GDPR/R process.

### MY ACTION PLAN (TRADITIONAL)

**Summary:** This tool provides a form that participants can use to write down their goal and why it's important to them and then list the detailed steps they will take within the specified period of time (including when and where to complete each step, what resources they need to complete the step). It also includes a section where participants can identify potential obstacles and solutions to them. (At the suggestion of staff who have piloted these materials, we use potholes and detours to refer to obstacles and solutions.) This form (or a variant of it) may be able to replace current individual responsibility or family development plans. A participant will take this form with them and you will want to keep a copy of it in your records to review and update at each encounter with a participant.

### MY ACTION PLAN (VISUAL)

**Summary:** This tool is a visual version of My Action Plan. It is designed to be used with the Potholes and Detours tool. The Visual Action Plan offers participants a visual representation of the steps they will take to achieve their goal. It contains the exact same information as the top portion of My Action Plan and is used in the same way. A participant can be encouraged to place in a prominent place to help visualize their goal.

### POTHOLES & DETOURS

**Summary:** This tool helps participants think through potential "potholes" – obstacles that may cause them to get off track – and the "detours" – actions they can take – to stay on path to their goal. This form can replace the bottom portion of My Action Plan if you think the visual representation and the language of potholes and detours will resonate better with participants.

### EXECUTIVE SKILLS PROFILE

**Summary:** The executive skills profile is intended to help coaches and participants focus on what skills a participant already has, and what could be improved upon to promote self-sufficiency. Administering this profile can help you get a clearer picture of a participant's skills, help them to select a job or career path that is a good fit with their profile and help to set priorities for how to best provide support and promote skill development. If used effectively, the executive skills profile has the potential to enhance individual goal attainment, and overall program outcomes.



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