

Goal Setting

Indiana Department of Workforce Development
Case Management Webinar



Introduction

Topics covered:

- Effective Goal Setting
- Cooperative Goal Setting
- S.M.A.R.T. Method
- Thinking Through Goals
- ACP as an Effective Goal Setting Tool

Goals

Aims or objectives towards which efforts are directed



Used to measure success



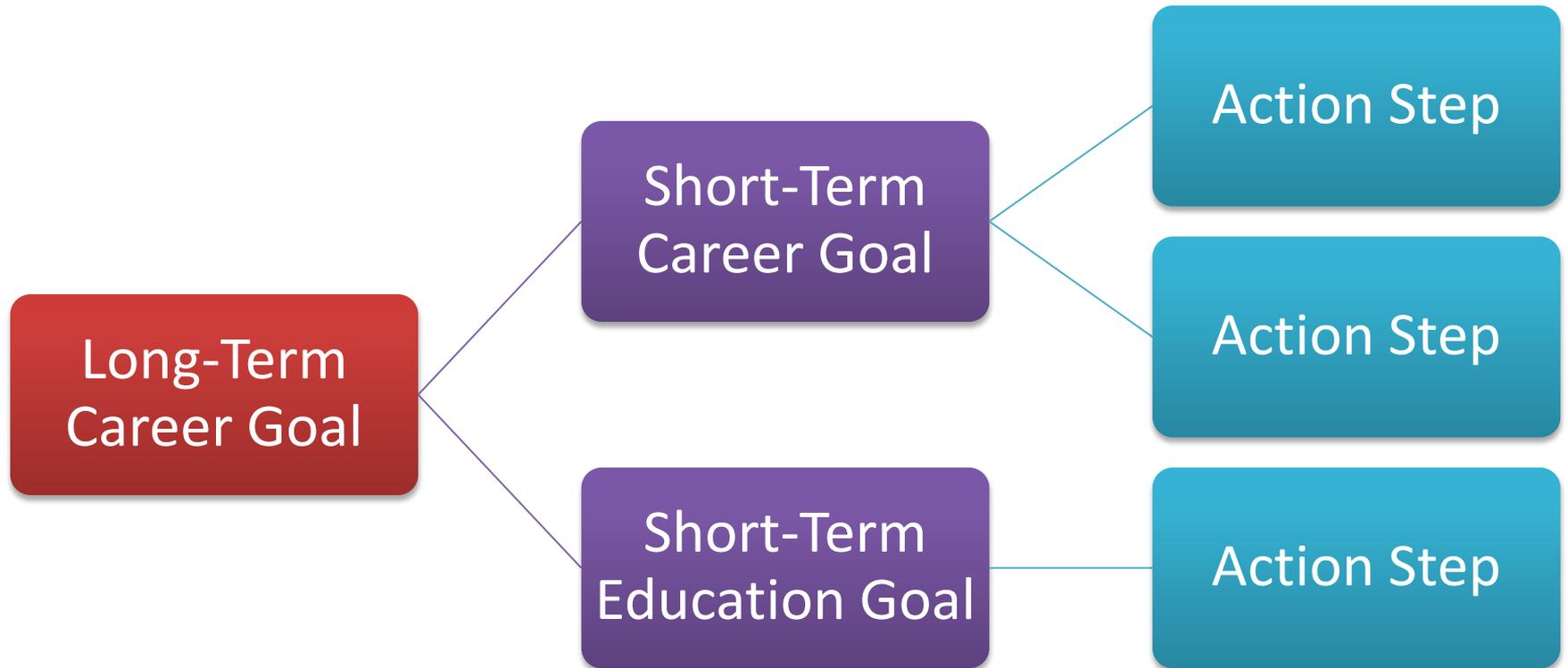
Effective goal setting allows a person to take charge of his or her own achievements and the processes to work towards them

Effective Goal Setting Results in:

- Improved performance
- Increased motivation to achieve
- Increased pride and satisfaction in achievements
- Improved self-confidence



Goal Setting



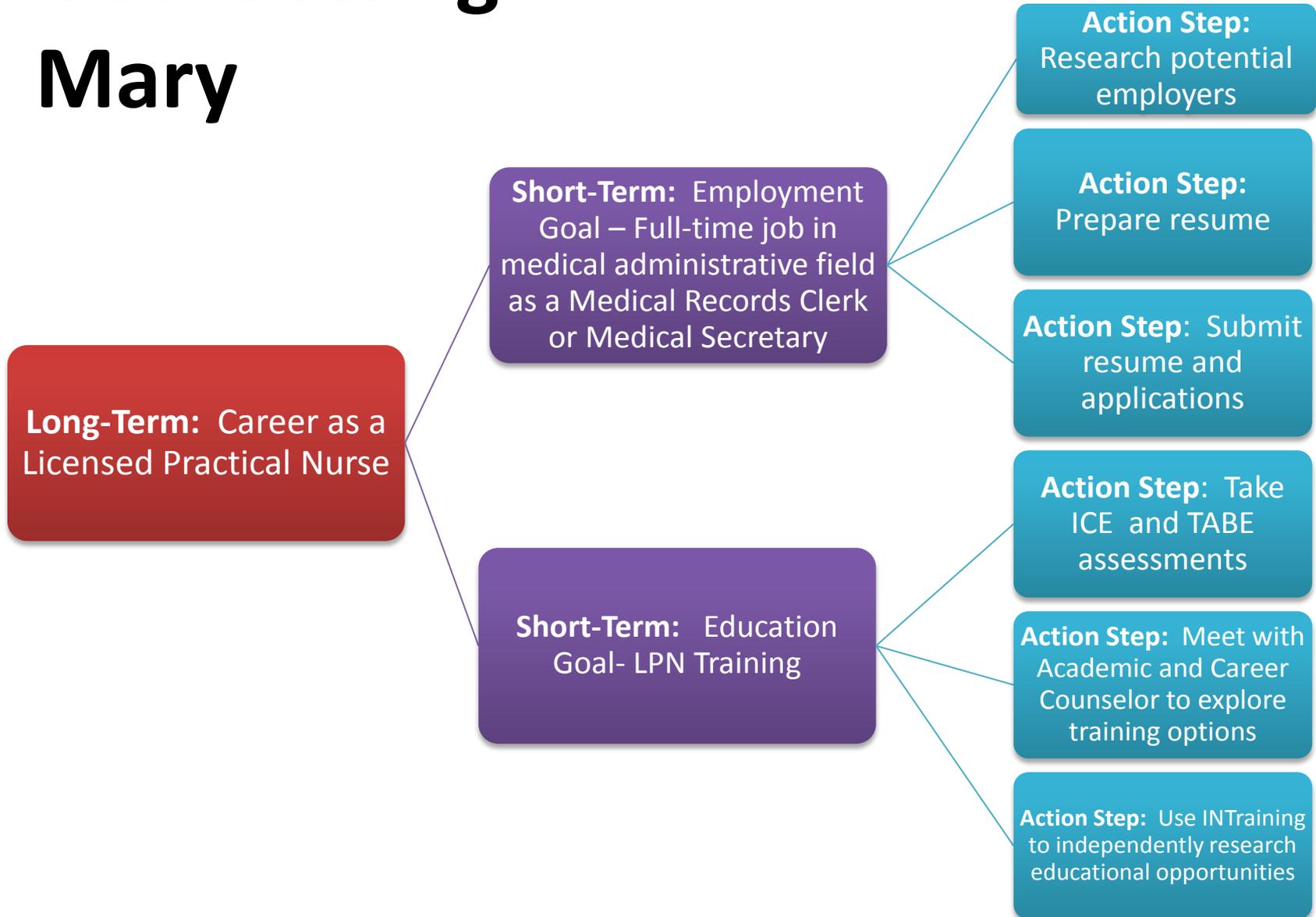
**Goal
setting is
not a
static
process.**



Case Study

Mary is a 38-year-old mother of 3 children. She is interested returning to the workplace after 12 years of being a home maker. She has experience in the administrative field, working as a receptionist before she had children. She has her high school diploma and attended some college classes. She is interested in pursuing a career in which she “can help people” and would like to pursue training to become a Licensed Practical Nurse. She is interested in obtaining employment immediately and plans to work while in training.

Goal Setting- Mary



Cooperative Planning and Strength-Based Philosophy

- Partner with customer
- Identify current skills and previous successes to develop positive rapport centered on customer abilities
- Customer is immediately engaged in goal setting process
- Encourage customers to see themselves as agents of their own success



S.M.A.R.T. GOALS



S - Specific

M - Measurable

A - Attainable

R - Realistic

T - Tangible

S - SPECIFIC

- Specify the who, what, when, where, why and how
- Provide as much detail as possible
- Both Case Manager and customer should agree on the desired outcome and when it should be achieved

***SPECIFIC GOALS GIVE CUSTOMERS
A TARGET AND HELP FOCUS EFFORT.***



M - MEASURABLE

- Clear concrete measurables - how much, how many or what the achievement will look like
- Goal should be stated so success can be evaluated
- Set timeline for the goal, but allow for flexibility.

***MESURABLE GOALS ALLOW CUSTOMERS
TO MAKE OBJECTIVE DETERMINATIONS OF
SUCCESS AND KEEP GOALS IN PERSPECTIVE***



A - ATTAINABLE

- Avoid over or under-estimating what can be accomplished
- Should provide challenge to strive for
- All action steps should be well planned and achievable

***ATTAINABLE GOALS RESULT IN
INCREASED MOTIVATION***



R - REALISTIC



- Personally meaningful
- Should correspond with customer's experience, education, skills, values, interests and personal traits
- Must take into account assessments, regional job market data and other relevant information

REALISTIC GOALS SHOULD BE REASONABLY ATTAINABLE WITHIN A REASONABLE AMOUNT OF TIME.

T - TANGIBLE

- Able to be experienced through at least one of the senses- see, hear, touch, taste, smell
- Not feelings, but real experienced changes

***TANGIBLE GOALS ENSURE OUTCOMES
CAN BE OBJECTIVELY MEASURED.***



EXAMPLE

I will get a job in the healthcare field where I can help people.



Is this goal S.M.A.R.T?

What kind of position in health care?

What is the timeline for measuring achievement?

Are there current employment opportunities in this field?



REVISED GOAL-

I will obtain employment as a Medical Records Clerk in a hospital or assisted living facility by the end of the month.

EXAMPLE

I will do my best to get some interviews with a few employers.



Is this goal S.M.A.R.T.?

What is meant by “do my best”?

How many interviews and what employers will be targeted?

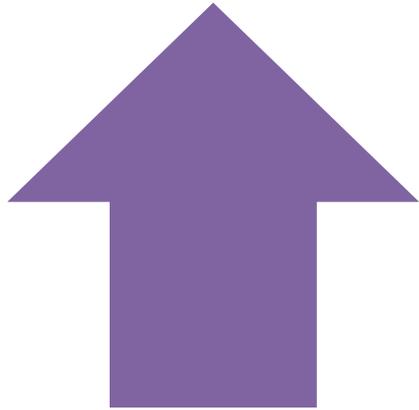
What is the timeline to achieve this goal?



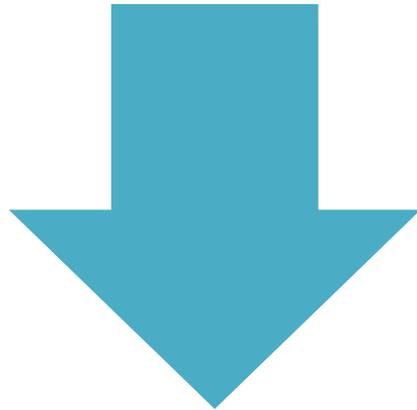
REVISED GOAL-

I will go on five interviews with employers in the medical field that are hiring administrative support in the next 4 weeks.

Difficulties in Goal Setting



Setting goals
too high



Setting goals
too low

Know Your Role in Goal Setting

Customer's Role

Identify Goals and Strategies

Articulate Goals and Action Steps

Decision Maker

Case Manager Role

Support and Motivate Customer

Monitor Customer Progress

Guide Customer in Making Realistic and Informed
Decisions

Thinking Through Goals

Open-ended questions help customers focus on how they will achieve their **long**-term goals through **short**-term goals that lead to:

- Motivation and follow-through
- Increased accountability
- Ownership of the goal
- Problem-solving skills
- **ACHIEVEMENT**



Thinking Through Goals

Possible open-ended questions include:

- ✓ What skills do you need to achieve this?
- ✓ What information and knowledge do you need?
- ✓ What resources do you need?
- ✓ What can block your progress?
- ✓ Can you see a better way of doing things?

Strategies for Effective Goal Setting

Use long-term plans to set short-term goals

Goals should be prioritized

Coach customers using factual information

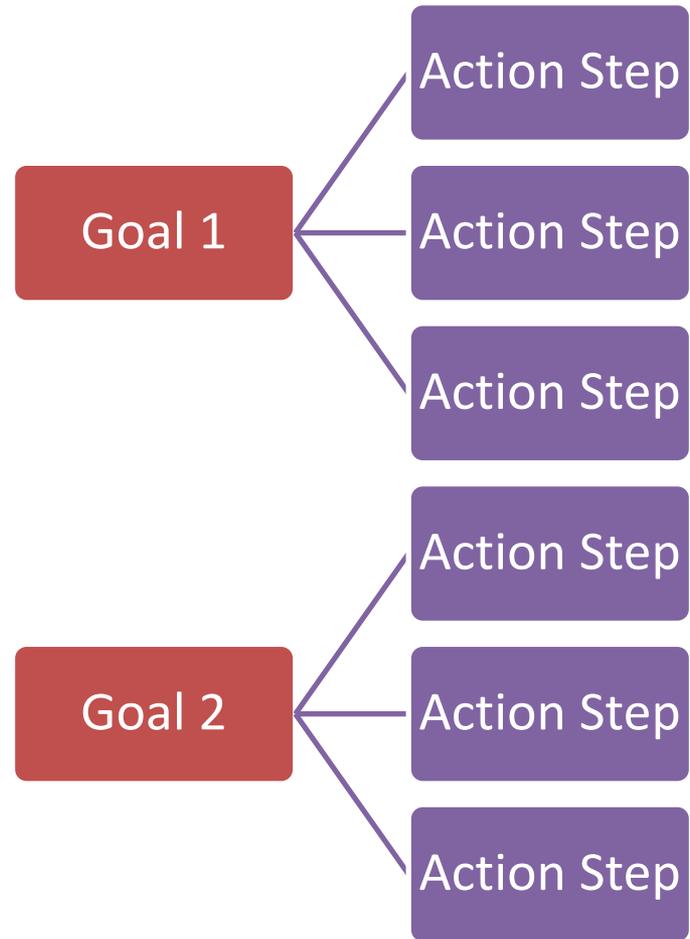
Write out goals

All goals should be adaptable and realistic

Academic and Career Plan (ACP)

- Provides an effective tool to use while goal setting with customers
 - Structure and motivational tool
- Goals documented should be focused on directly impacting employment and training
- Useful to develop long-term and short-term goals and action steps
- Can be used to track progress

ACP and Goal Setting



ACP and Goal Setting

Employment
Goals

Action Plan

ACP- Employment Goals

- Important to ensure long-term and short-term employment goals are specific, measurable, attainable, realistic and tangible
- Case Managers should use effective communication techniques, including *reflection statements* and *open-ended questioning* to ensure the customer articulates clear and concrete goals

ACP Employment Goals- Mary

Long Term Employment Goal:

I will obtain a full-time position where I am able to help people working as a Licensed Practical Nurse within 5 years.

Short Term Employment Goal:

To obtain an administrative position in the healthcare field in the next 2 months where I can use my current skills while pursuing the education needed to become an L.P.N.

Notes:

Customer must secure childcare and afterschool care for her children.

ACP- Action Plan

- Resolving all identified needs and barriers should be addressed in the identified goals and action plan in order to reach employment goal
- It will be important for the case manager to use the Strength-Based/empowering approach when working with customers
- All Action Plans should be as detailed as possible.

ACP Action Plan - Mary

Date Set: 3/8/12

Goal Type: Self Sufficiency Goal

Description:

In order to prepare to start a full time position in the Healthcare Administrative (Medical Records Clerk/ Medical Receptionist), I must find secure childcare and afterschool care for my 3 children

Action Step:

- 1- Research childcare options available in a 10 mile radius.
- 2- Visit facilities and take tour to observe teachers, children and environment.
- 3- Make a decision which childcare option is best- distance, hours and environment.
- 4- Research any funding assistance or childcare subsidy available.
- 5- Enroll children.

Status: Set but attainment pending

Planned Date of Attainment: 4/15/12

ACP Action Plan - Mary

Date Set: 3/8/12

Goal Type: Career Goal

Description:

I will gain full time employment in the healthcare administration field as Medical Records Clerk or Medical Receptionist in the next 6 weeks.

Action Step:

- 1- Attend resume and interviewing workshops at the WorkOne center in the next week.
- 2-Update resume with current experience by the end of next week.
- 3- Research current employment opportunities using newspapers, online resources and speaking with BSRs three times/week.
- 4- Submit at least 10 resumes to employers who are actively hiring every week.

Status: Set but attainment pending

Planned Date of Attainment: 4/19/12

Setting Goals in the WorkOne Center

The Case Manager must provide guidance ensure all goals adhere to the S.M.A.R.T. method

Setting effective goals will motivate and empower the customer

By creating and focusing on cooperative goals and action steps, the likelihood of customer success is increased

Questions?



Training Reference, Reflections and Exercises

Effective Goal Setting	Section: Beyond the Basics- Page 42 Section: Effective Communication- Page 70
Cooperative Goal Setting	Section: Beyond the Basics- Page 45 Section: Effective Communication - Page70-71
S.M.A.R.T. Goals	Section: Beyond the Basics- Pages 42-45 Section: Effective Communication-Pages 71-75
Online Materials	http://in.gov/dwd/WorkOneProfessionalDevelopment.html