

# FAMILY-CENTERED COACHING

A TOOLKIT TO  
*Transform Practice & Engage Families*



THE  
**PROSPERITY**  
AGENDA



**Dear Colleagues:**

The W.K. Kellogg Foundation (The Kellogg Foundation) is pleased to introduce the Family-Centered Coaching Toolkit, a new set of resources that supports parents and families in moving toward their goals and greater economic prosperity. Family-centered coaching offers practitioners an open-sourced set of tools to help create strong relationships and partnerships with families. A growing number of organizations in various sectors and fields are beginning to use coaching and other innovative approaches to work differently with families. To help catalyze and spread this work, the Kellogg Foundation has invested in this effort to bring the best thinking, best practices, and most effective tools and approaches together into this Family-Centered Coaching Toolkit.

At the Kellogg Foundation, we have a mission of supporting children, families, and communities as they strengthen and create conditions that propel vulnerable children to achieve success as individuals and as vital contributors to their communities and the greater society. We believe all people have the inherent capacity to effect change in their lives, in their organizations, and in their communities. In service to this mission and our values, we have been working to advance family-centered approaches, efforts that create equitable conditions and combine integrated supports for families in education, health, family economic security, and social capital. Through these approaches, we seek to break intergenerational cycles of poverty by addressing equity in employment and education, building economic stability for families, and helping all children grow and thrive.

As family-centered strategies are rapidly expanding, there is a critical need to support programs and partners in approaching their work with families holistically. Unfortunately, most coaching efforts are not truly family-centered – that is, they do not approach coaching in a whole-family way. Organizations may work with parents on parenting coaching, or on workforce/career planning, or on financial coaching. Few programs focus on coaching that takes the whole family into account. But families don't segment their lives and goals into the silos and systems that have been created. And because coaching is at the core of family-centered approaches and is one of the key places where all of the elements of what parents and children need and deserve come together, it is well worth investing in helping those working with families adopt these effective practices.

We hope that this toolkit will help spark, transform, and strengthen the ways in which we all come together to serve families more effectively and holistically across generations. The WKKF has a deep commitment to racial equality and developing leaders and engaging communities to solve their own problems, and we lean heavily on our partners' collective work around family engagement in drafting these resources. This toolkit was developed with engagement, testing by and feedback from a range of community organizations, public-sector practitioners, and parents, and has resulted in tools that honor the resiliency and diversity of families. These tools don't just focus on one aspect of a family's life, but follow, support, and celebrate the many various goals of families in transforming their lives for the better.

This toolkit is an ever-evolving resource, and we hope that you will contribute your expertise, insights, and feedback as we move forward. We know that together, committed individuals with passion and purpose can advance more effective practices for families. Together we can transform the ways in which our programs and systems respond and meet the needs of whole families.

Thank you.

**Paula Sammons**  
**Program Officer**  
**W.K. Kellogg Foundation**



**Dear Colleagues,**

Today more than ever, we need solutions that translate into real economic stability for families struggling to move up and out of poverty. Economic progress has been far too distant for communities across the country. With increasing poverty rates and economic disparity coupled with historic institutionalized bias and constraints for families, a family-centered coaching approach provides an essential and systemic shift away from “managing” families to an approach that equips them to set and achieve their own goals toward security.

Family-centered coaching allows staff to partner with people and their families holistically – that is, with their full set of strengths and goals, challenges, and systemic barriers. Regardless of the type of organization and programmatic goals, family-centered coaching changes how families are served by adopting a family-focused mindset. Family-centered coaching broadens the dynamic from the individual to inclusion of the full family, including stepparents, grandparents, and foster parents as well as family guardians and champions. It recognizes that families change over time and offers flexibility for families to guide the definitions and process.

**LAUNCHING FAMILY-CENTERED COACHING**

The Prosperity Agenda is honored to continue the work of the Center for Budget and Policy Priorities and carry family-centered coaching forward. We will continue to adapt the Family-Centered Coaching Toolkit and resources to meet the needs of the field and develop a meaningful community of learning and practice. Leveraging the expertise of Global Learning Partners, we will continue to adapt the Family-Centered Coaching Toolkit and resources to meet the needs of the field and develop a meaningful community of learning and practice.

Our long-standing commitment to break the cycle of intergenerational poverty brings a powerful purpose to our partnerships with nonprofits, employers, and government agencies. Our knowledge of the communities we serve and the challenges they face ensures that we are focused on the right problems, and that we learn about the complicated dynamics at play. By combining the power of purpose and experience with human-centered design principles, we develop pragmatic solutions that make a difference.

**FROM LEARNING TO LEADING**

Our vision for family-centered coaching is to build relationships through learning and collaboration. Success means that we have created an environment and a set of tools that can reflect your community’s values and goals. It means that we continue to coauthor a pathway alongside families. It means that learning translates into achievable leadership.

We hope you will join us on this journey to transform the way we engage and serve families in our communities through a family-centered coaching approach.

**Diana Dollar**  
**Executive Director**  
**The Prosperity Agenda**

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# INTRODUCTION

*Welcome to the Family-Centered Coaching Toolkit.* We are excited to offer a set of strategies, tools, and resources that can help programs, agencies, case managers, coaches, and others change the ways they work with families striving to reach their goals. With this set of resources, we are hoping to undo, and redo, how we approach working with families – to see families holistically, even though the funding streams and programs within which we work may not.

Whether you are front-line staff, a coach, or a case manager, and whatever type of organization you work in (e.g. workforce development, human services, early care and education) this toolkit is for you. It can guide how you work with a participant using what we call family-centered coaching.

In this practice, the focus is on who you are serving – adults with families – not on the type of organization in which you work. In this way, the toolkit can help staff, supervisors, organizations, and partners to plan for and intentionally change the way coaching is delivered to families. You may be working within your organization or choosing to partner with other organizations to support a whole-family approach. We hope this toolkit helps you to plan for and intentionally change the way coaching is delivered to families. Our companion document, *Family-Centered Coaching: Assessing Organizational Readiness and Creating Partnerships*, can also help organizations move towards a more whole-family approach to coaching.

We know that what happens within families affects how families are able to move ahead. Approaches that take into account all the concerns a family may have will help programs succeed in helping families succeed. And how organizations approach

working with families matters: using a strength-based, parent-led approach recognizes the resilience of families. Understanding the larger contexts of racism, lack of opportunity, and program silos is important for serving families effectively.

New and exciting research and front-line methods are emerging that can inform your work with families. This toolkit brings together all these pieces to offer you strategies, tools, and resources to help you coach families better.

“Coaching” is a term that many of us use, and it has come to mean many things. Across any given set of programs, coaches may be using a variety of approaches, including elements of case management, mentoring, coaching, and counseling. A key goal of this toolkit is to steer how you work with families toward a coaching philosophy that places the participant in the lead, with staff playing a critical supporting role. At the same time, there are times when other methods, such as case management or motivational interviewing, are needed to help families move to a place where coaching can be most effective. This toolkit offers a framework that incorporates multiple approaches, with goal-setting as a key technique of supporting families in making the changes they need.

# WHAT IS FAMILY-CENTERED COACHING?

At its core, family-centered coaching changes the fundamental way in which case managers, coaches, and other family-support workers engage participants. Some of the terms in this toolkit might be confusing, so it's important to define what we mean.

When we refer to a **coach**, we mean a person who works one-on-one with a participant in a collaborative process to help identify and achieve individual and family goals. This includes everyone who provides one-on-one services, including case managers, family-support workers, counselors, and others. It does not mean, however, that a coach is only using coaching to support families.



When we refer to a **participant**, we mean the person whose issues are the subject of a coaching conversation – the agent for setting and achieving family goals. Because the target audience for family-centered coaching is often parents, the terms “participant” and “parent” are used interchangeably in this guide. In addition, our definition of parent is purposefully broad. It may include grandparents, relatives, foster parents, and other caregivers who are responsible for keeping a family moving forward together.

Similarly, when we refer to **families**, we take an expansive view of intentional and created families in their many varieties. A family could include a parent and their children. It could include stepparents, grandparents, and foster parents and children. Or it may include cousins, aunts, uncles, close friends, and any other person who is considered part of the family.

The first key point is putting the participant or parent in the driver's seat of the work. Parents are their own best experts at what they need, what strengths they can draw from and build upon, and where the sticky challenges are for themselves and their families. In family-centered coaching, the participant takes the lead in identifying goals for their defined family. At the heart of this work, the coach's role is to help the participant to do this and to establish a transparent relationship with the participant. This enables coaches to support parent-driven agendas. You as a coach enter with a wide lens on how a family may be defined and the range of interests, capacities, and needs they may have. When constructed in this way, the relationship between a participant, their defined family, and the coach can be transformational for families to achieve their goals.



Parents are their own best experts at what they need, what strengths they can draw from and build upon, and where the sticky challenges are for themselves and their families.

Second, family-centered coaching focuses on the whole family instead of focusing only the interests of one person. While many organizations focus on particular aspects of a participant's life, such as financial stability or child-developmental outcomes, family-centered coaching aims to bring all aspects together to better support the family. Family-centered coaching helps you find ways to consider the whole family even if all family members aren't a part of the actual coaching sessions.

Third, family-centered coaching takes into account different perspectives on and approaches to improving outcomes for families, recognizing that families need different things at different times to move forward. Importantly, family-centered coaching is rooted in an understanding of the institutional forces that prevent families from moving forward: the long and persistent effects of systemic racism and poverty are at the root of many family challenges. A deep recognition of this is critical to supporting families living with these realities.

The family-centered coach's job is to keep the whole family in mind. Ideally, a family would have a relationship with one coach who helps to track and coordinate supports, resources, and tools that



the family needs, but we know that the systems and programs are not currently designed to support a single point of contact. Therefore, successful family-centered coaching allows for flexibility in implementation that is based on an organization's mission, structure, community resources, and the overall outcomes your organization hopes to achieve.

We have grounded this toolkit on several core principles, many of which come from successful efforts in working with families. Family-centered coaching is guided by these values and operational principles:

## FAMILY-CENTERED VALUES

<p><b>FULL- FAMILY FOCUS</b></p>	<p>Coaches address the interests of all members in a family, including children, elders, and other family members or people identified by a parent. Coaches know that families change over time, and periodically check in on who is in the family circle.</p>
<p><b>FAMILY-LED</b></p>	<p>The work of identifying and achieving a family’s goals is led by the family. The family is the agent in setting goals and direction for their lives and the lives of family members. “Family-led” means you help families recognize and own their own power and agency. You are responsive to families’ desires to coach parents and children together. It also means the family defines who is a member.</p>
<p><b>RESPECT</b></p>	<p>Coaches have deep respect for a family’s expertise and lived experience. Respect is fundamental to establishing trust in a coaching relationship.</p>
<p><b>STRENGTH-BASED</b></p>	<p>Coaches start with an understanding that all families have strengths. The family identifies their strengths, and the coach then works with families to utilize these strengths and build others.</p>
<p><b>RACIAL EQUITY AND INCLUSION</b></p>	<p>Family-centered coaching recognizes the impact of institutional racism and implicit bias within the organizations and systems working with families. Staff understands these influences in their own approaches to families, in the design and delivery of social services, and in the lives of families served, and knows that understanding these forces is critical to be effective in working with the family.</p>

## FAMILY-CENTERED OPERATIONAL PRINCIPLES

<p><b>FLUIDITY OF APPROACH</b></p>	<p>Coaches work together with parents to discern a family’s readiness for change. Based on what they learn, they may use a variety of approaches when working with parents, ultimately moving toward a goal-setting approach that supports changes the family wants. This can happen during a single meeting or over an ongoing course of working together, with the understanding that a family’s readiness for change may fluctuate over time and can be in different areas of their life.</p>
<p><b>TRANSPARENT</b></p>	<p>Coaches talk with parents about the steps of family-centered coaching, including the different roles the coach can play, such as case manager, counselor, etc., based on the parent’s stage of change and goals at any one point in time. Together, parents and coaches can discuss which role may provide the best support for a parent at that time.</p>



PEER-BASED	Coaches operate from a place of peer respect, knowing that both staff and parent have strengths and challenges that change over time, and that the relationship is collaborative.
CHOICE	Families can choose the level and type of support and tools needed over time, based on their interests and results sought. Programs are designed to provide parents access to different coaching tools at different stages in the coaching relationship, knowing that families can be at different stages with different parts of their life. Having a flexible approach to coaching recognizes that families may want different support at different times, depending on the results they are seeking to achieve.
RESPONSIVENESS	Coaching is responsive to family interests, as determined by the family. This means the coaching approach needs to be flexible. Coaches meet parents and families where they are, and are able to change hats as families identify their interests. Family-centered coaching supports coaches to move fluidly among approaches and to develop agility to do so.

## HOW IS FAMILY-CENTERED COACHING DIFFERENT FROM COMMON APPROACHES TO WORKING WITH FAMILIES?

Traditional case management has sometimes viewed the family as something to be fixed or a problem to be solved. This minimizes or forgets that every family brings strengths to the table, and that families know best what they need. Because of funding requirements or organizational mission, coaching sometimes focuses on only one aspect of a parent's life. To support families most holistically, putting parents in the lead and holding a wide view of family interests is key.

Many organizations are beginning to train staff in other ways of working with families, including coaching and goal-setting, motivational interviewing, and strength-based case-management practices. This toolkit brings together resources and approaches

based in all of these techniques as well as lessons from other promising practices. The resources also weave in evidence from a range of disciplines, such as trauma-informed care, behavior economics, and brain science, to help provide the most contemporary set of tools for working as a partner with a family.

To support families most holistically, putting parents in the lead and holding a wide view of family interests is key.

At its best, family-centered coaching addresses organizational program goals and the parents' goals and desired results for their children and family. Here's an example:

**A parent may have goals to buy a home, to support their child’s artistic interests, and to help an aunt with handling medical debt.**

If the coach is situated in an organization with a goal of increasing home-ownership, it might be the practice to focus solely on this goal. Yet all three of the parent’s goals are interrelated. Can the parent buy a home and still afford to support their child’s artistic interests? Does the aunt need immediate financial support to manage her medical debt, and if so, how does that affect the family’s current and future budget and choices? Without knowing the full range of family interests, many things could happen. A family might make choices that limit its ability to reach family goals in another area of life – buying the home might mean the child can’t take art classes. Or, unexpected events might pop up: having taken out a mortgage, the family might have to sell their house because the aunt’s medical debt becomes urgent in order to continue her care. Balancing organizational program goals with family goals may be a challenge, but because these goals are often interrelated, both need to be addressed in family-centered coaching. Addressing them this way also increases the chance of success of both goals.

*At key places in this toolkit, you’ll find a “Checking In” box where we ask you to stop and reflect on the content of the section. We ask questions to help you reflect on your own experiences and how this work fits with what you know to be true. These notes are just for you, and no one else.*

 **CHECKING IN**

What resonates for you in this section?

What concerns you about this approach?

What two or three things do you see here that would be helpful in your work with families?

- 1.
- 2.
- 3.

# WHAT'S IN THIS TOOLKIT AND HOW TO USE IT

We have assembled a set of tools and resources that can help implement this vision of working holistically with families to accomplish their goals. The main focus of the toolkit is on goal-setting in service of milestone achievement, because this approach is the most promising in putting parents in the driver's seat with a focus on longer-term goals. But there are other approaches that lead toward goal-setting. These approaches, including case management and readiness assessment, provide important tools at key moments for families, so they are also addressed, though more briefly. We also offer guidance on how parents and coaches can work together to decide what approach is best at which time.

## MILESTONES VS GOALS

What is the difference between goal-setting and milestone achievement? Milestones are essentially large goals – they are the big events that are often the focus of programs, such as getting a job, completing a GED, or finding an affordable apartment. These large milestones, which are often called goals in other kinds of coaching, are sometimes overwhelming to parents because they actually contain many smaller steps that together will help a parent reach the milestone. In family-centered coaching, goal-setting is the process of working with parents to set and reach small, incremental, short-term steps towards those larger milestones. In this way, the parent builds success and skill in goal-setting and moving forward toward their milestone. Ongoing goal-setting combined with developing and carrying out a plan allows families to achieve their larger overarching goal or milestone achievement.

The toolkit also incorporates information and promising practices from other coaching curricula, and incorporates strategies from the fields of racial equity and inclusion, trauma-informed care, behavioral economics, and executive skill-building. It is our aim not to give you everything there is to know about each of these, but instead to provide an overview of each field and extract practical lessons you can integrate into your work with families. At the end of this toolkit, there are more extensive resources noted in each of these areas for those who want to delve in.

The sections below outline the family-centered coaching approach in five overarching sections:

### SECTION 1: BUILDING A FAMILY-FOCUSED MINDSET

First, we acknowledge and spend significant time discussing how to change not just what we do with families, but how we engage with them. This section asks us, as front-line staff, to think through our own biases and perspectives. It asks us to shift our mindset so that regardless of the tools or methods we employ when working with families, we fundamentally center our work using a strength-based and peer-based approach.

### SECTION 2: BUILDING YOUR SKILLS FOR COACHING

Second, we outline three key ways of working with a family, based on its readiness for coaching:

**Case management.** Used when participants are facing short-term issues and need immediate help navigating systems, finding information, or addressing crises.

**Readiness assessment.** This approach uses questions to help participants more clearly define their goals and what changes they want to see in their lives.

**Goal-setting.** Increasingly seen as a promising practice to strengthen a wide range of service-provider skills that support people in setting and achieving their goals for their lives. Research and practice shows that all of us struggle to change our behavior – even when we know what we want to do – and that we benefit from the support of another in moving toward change.

We also explore how to shift between these approaches with families, and how to identify and discuss with a family what it might need at a given moment.

### SECTION 3: ADDRESSING THE WHOLE FAMILY

Across fields, such as human services, workforce development, and early care and education, work with families often overlooks keeping the whole family in mind. Because families don't operate by focusing on only one aspect of their lives at a time, bringing the whole family into focus and the many areas of life they manage is central in helping families reach any one goal, or several goals, at the same time. To help do this, we provide the "Wheel of Life" tool in this section as well as short modules on each of the seven content areas found within the wheel.







### SECTION 4: INTEGRATED LESSONS FROM OTHER DISCIPLINES

Innovations across coaching and readiness assessment and case management are emerging. Researchers and practitioners are finding new ways to optimize work with families and improve practice and outcomes. Trauma-informed care and behavioral economics are two areas where new knowledge of how to optimize behavioral change can be applied to working with families. Similarly, promising studies and practices are emerging on how the brain reacts to the persistent stress of being low-income and/or a person of color, and on executive skill-building, which provides practical ideas to help families achieve their goals.

### SECTION 5: PULLING IT ALL TOGETHER: A STEP-BY-STEP GUIDE

In this final section, we bring all the pieces together in a step-by-step guide for coaches to use when working with families. We lean heavily on existing resources, weaving in tools and tips from across a number of fields to bring you the best thinking on how to improve your work with families.

#### IT IS OUR HOPE THAT BY THE END OF THIS GUIDE, YOU'LL HAVE A FRAMEWORK AS WELL AS THE KNOWLEDGE AND SKILLS TO:

-  work with families using emerging best practices from across fields,
-  focus your view of parents and families on their strengths and resilience, rather than needs and challenges,
-  create a positive mindset for yourself in working with a family at any point in time,
-  use the best approach for each interaction or meeting with a participant, based on their stage of change,
-  use a set of questions covering a full range of issues in a family's life, and
-  adapt and address needed modifications that can support and enhance the work you do with families.

## TIPS FOR MAXIMIZING THIS TOOLKIT

As with any set of tools, the effectiveness of this toolkit for you as a coach lies in how you decide to use it. The following tips will help you get the most out of the tools and approaches.

**Practice.** Work with a colleague or a small team to practice using the tools before you work with a family, and then occasionally for a tune up. Role-play tough meetings and get feedback from your coworkers. Practice asking powerful questions. It takes time to build a level of comfort with a strength-based, family-centered approach, and practicing in a safe setting will help you be an effective coach when it really counts – with families.

**Case conferencing.** If your team is using family-centered coaching tools, hold regular case conferences to discuss the families with which you are working. This will help you strengthen your family-centered coaching practice and get support at the same time. Take the time to dig deeply into who each family is, their strengths, their goals, and the plan for coaching. Ask for feedback from your team. Have you and the family identified all their assets and interests? Are you being self-reflective before beginning the meeting about potential hidden biases or underlying assumptions you are making about the family? What suggestions do your coworkers have about your approach to an angry or frustrated participant?

**Identify your go-to tools.** After using some of the tools, identify a few that you plan to use on a regular basis in your work with families. Each coach may have a different set of tools that work for them and the families with which they work. Become deeply familiar with the tools you find to be most effective and reflect occasionally on how you are using them with families.

**Enlist your supervisor.** Family-centered coaching takes practice, time, and work. Talk with your



supervisor about trainings that you would like to take, such as trauma-informed care, or understanding racism, or motivational interviewing. On a regular basis, ask your supervisor for advice in how to work with specific families on some element of family-centered coaching in order to give them an understanding of how you are working with families.

**Reflect.** On a regular basis with your team and/or supervisor, reflect on how your approach to working with families is shifting. Note challenges and how to address them, such as extra time for the first few meetings with families, or finding a new referral source for particular needs identified by families. Most importantly, note where there are successes, perhaps in how families are reaching smaller goals more easily and building their confidence, or in how the work feels more positive with some families.



# THE FAMILY-CENTERED COACHING HUB AND OTHER RESOURCES

## ABOUT THE FAMILY-CENTERED LEARNING HUB

The Prosperity Agenda is launching a Family-Centered Coaching HUB to help facilitate shared learning and practice, both online and in-person. The HUB will grow through the regular practice and participation of coaches, trainers, supervisors, and organizational leaders as they apply the techniques and tools in the toolkit to better align culture and practice. We will encourage coaches to work with peers to lead a change in mindset through peer-based discipline: practicing powerful questions, using case conferencing to role-play, and thinking about how to use strength-based mindset. We can help facilitate this work within your team and your organization, and in connecting you with other organizations across the country.

The Prosperity Agenda will also support peer-based learning through an online platform and an annual convening where coaches can connect with peers, refresh skills, and learn about new techniques and tools from this community committed to strong outcomes for families. This learning community will provide opportunities to access resources, such as a directory of trainers, webinars, support forums, and access to new tools created by other coaches and peers. The learning community will also have access to real-time feedback loops to help facilitate continuous improvement in your work as well as improvements to the tools and practices of family-centered coaching. Through partnerships with regional practitioners and national networks, the Prosperity Agenda will further support a network of coaches as we all work together to integrate, sustain, and grow the practice of family-centered coaching.

## ORGANIZATIONAL ASSESSMENT

In addition, recognizing that coaching takes place in an organizational environment, we developed a complementary organizational assessment, which is a critical part of family-centered coaching. How an organization views parents and supports holistically working with families is essential to implementing family-centered coaching. Securing support from supervisors provides an environment for coaches to flourish and fully embrace a family-centered coaching approach. You can contact the Prosperity Agenda to get a copy of the assessment or find it on the HUB website at <http://www.theprosperityagenda.org/familycentered-coaching>.

## SUPERVISOR TOOLS TO SUPPORT FAMILY-CENTERED COACHING

Family-centered coaching first and foremost changes the fundamental way in which case managers, coaches, and other family support workers engage participants. It focuses on the whole family instead of only on the interests of one person, and takes into account different perspectives on and approaches to improving outcomes for families, recognizing that families need different things at different times to move forward.

For coaches to fully implement family-centered coaching, they need the support of their organizations – and perhaps more importantly, the support of their supervisors. Family-centered coaching requires an expanded skill set and a different approach to working with participants. Usually it also requires deeper relationships and accountability both within

organizations and across partners. To succeed in their jobs, coaches need support from supervisors to:

- structure their work toward a family-centered approach
- problem-solve and support individual family situations
- juggle between coaching families and compliance requirements that some coaches must focus on as part of their jobs
- make connections to staff and referral sources related to the Wheel of Life
- develop accountability mechanisms across staff and referral partners
- receive training in implicit bias, racial equity, motivational interviewing, and goal-setting
- gain the support of other staff and the organization as a whole.

Supervisors can mirror the family-coaching approach of line staff with families by utilizing a coaching approach with their staff. This offers the opportunity to demonstrate to staff the benefits of a strength-based coaching approach as well as offer greater understanding to supervisors of the challenges in implementing coaching, which in turn will support the work of line staff. Supervisors can work with staff using inquiry, support, goal-setting, and other tools to support staff in their daily work.

Fortunately, a stellar set of available tools already incorporate this approach. Utah's Department of Human Services recognized the benefit of training supervisors in how to coach their front-line staff and developed a comprehensive three-session training for supervisors in their Family-Focused Case Management and Coaching Materials (<http://tinyurl.com/yafn9b5m>). The supervisory training curriculum includes:

- What is coaching
  - Definition of coaching

- Coaching vs mentoring
- Coaching vs managing
- How to effectively coach
  - Building the relationship
  - Effective communication
  - Coaching process

The training includes a number of tools, including a supervisor self-assessment, an assessment of supervisory coaching styles, some clear reference graphics for easy review, and some practice scenarios.

Similarly, the University of California, Davis, has developed a training manual to support front-line staff (<http://tinyurl.com/ya9xpgr8>) to implement coaching approaches in the child welfare system. Two chapters in particular offer tools for supervisors to support staff. Chapter four focuses on capacity-building for coaches and Chapter nine discusses supervisors as coaches and offers several rating scales for supervisors and coaches to assess their skills.

Both of these tools offer supervisors in-depth information and resources to support a coaching approach to supervision that is reinforcing of the family-centered coaching approach, and that can be part of an organization's shift toward a strength-based approach in organizational culture and operations.



# SECTION 1: BUILDING A FAMILY-FOCUSED MINDSET

If you are not already using a family-centered approach, family-centered coaching may require you to make a shift. Whether you are a coach, case manager, counselor, or family-support worker, family-centered coaching requires a mindset that puts the parent at the center. It is imperative that you see the participant as resourceful and having the solutions to their challenges. Participants have developed strengths over their lifetimes and they are working hard to move their families along.

Do you view the people you are working with as resilient or do you think they need you to fix their family? Do you believe the participant has the answers to their challenges or do you view yourself as the expert? This section will help you begin to identify any biases or stereotypes that could be blocking you from seeing the participant from a strengths-based perspective.

Coaching is built on the premise that participants have the answers. This means *really believing* participants do have their own answers.

For some staff, adopting family-centered approaches may require a fundamental shift in the way you work with participants. These approaches require a change in the power dynamic and the relationship, especially if you are used to being the expert and resolving problems. To work with participants to support them to find their own solutions to

their challenges will be a different dynamic. This is true whether you are using a goal-setting, case-management, or a readiness-assessment approach.

It is important for coaches to get into a positive mindset before working with participants. You can do several things before and during a meeting with participants to support you in holding a positive mindset.

## CLEAR YOUR MIND AND ELIMINATE DISTRACTIONS

As you prepare to meet with a participant, prepare to devote your entire attention on the participant. Clear your mind in preparation for the meeting. Free yourself from distractions during the coaching session. If your mind is racing, jot your thoughts down by hand or electronically. Draft your to-do list, if that is distracting you. Make note of work you want to address after the participant leaves. Having written reminders of what needs to be done will help you clear your mind and focus on the coaching. Some people find meditation or a few deep breaths help clear the mind. Build this into your preparation process if it is useful to you. Once your mind is clear, make sure you remove anything in your meeting space that may distract you during the coaching session. Turn off your computer. Silence phones.

## SELF-MANAGEMENT

Coaching is built on the premise that participants have the answers. This means really believing that participants have their own answers. Coaches may be

tempted to be the expert or problem-solver, especially when the participant seems stuck. Self-management starts with holding back your advice and opinions, and instead leading participants with questions. Eventually you will find times when it is appropriate to share valuable experience or expertise. If the experience is related to the goals the participant has set, ask permission first to offer your thoughts. If you are shifting to problem-solving, also ask permission and be clear that you are changing from your coaching hat to a counseling or case-management hat.

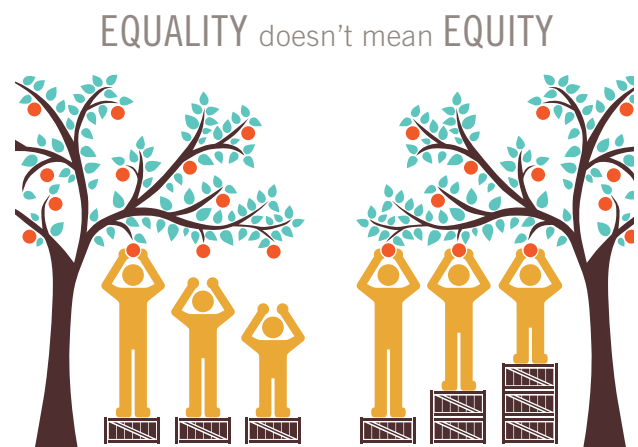
## TAKING CARE OF YOU

When you sit down with your participant, you bring all of your emotions and stresses with you. Coaching a participant can sometimes raise issues that are emotional triggers for you. If you go into a coaching session unaware of how you are feeling, issues or triggers may become amplified. For example, if you are uncomfortable when people sit close to you, be aware of this and set up your space to avoid a build-up of your discomfort during a meeting. Proactively addressing your triggers and practicing self-care is essential. One good resource to tap is *What About You? A Workbook for Those Who Work with Others* (<http://508.center4si.com/SelfCareforCareGivers.pdf>) This guide helps ensure that you are thinking about your own health and stress level, addressing issues of burnout or vicarious trauma, and how to avoid your own pitfalls while working with families. Consider enlisting the help of a coach or a therapist to work on your own emotional triggers.

## EXAMINE HIDDEN BIASES AND BE AWARE OF THE IMPACTS OF INSTITUTIONAL RACISM

Everyone, no matter their race or upbringing, has biases and stereotypes. We are wired to create

categories in our minds. Biases may be based on race or ethnicity as well as gender or economic class. When our assumptions and biases get in the way of connecting with people, or when biases are institutionalized to harm or disadvantage some people and not others, they can lead to harmful outcomes for people and communities. By clearly addressing equity and inclusion in our communities, organizational decision-making, and family-centered coaching practice, we can become consciously and actively part of the solution – equitable opportunities and outcomes for all – instead of unconsciously or passively part of the problem, where biases and inequities are perpetuated, often unintentionally.



Maine Office of Health Equity: accessed at: <http://www.maine.gov/dhhs/mecdc/health-equity/>

Family-centered coaching includes a strong emphasis on equity, so coaches must understand the impacts of three types of bias on the families they are coaching: systemic, organizational, and individual. Understanding and addressing these three types of bias is critical to effectively use this toolkit. Two are addressed here – systemic and individual – while organizational bias is discussed in the *Organizational Assessment of Family-Centered Practices* (<http://www.theprospertyagenda.org/familycentered-coaching>) that is a companion to this toolkit.

**Systemic bias**, and in particular the impacts of systemic racism, is an array of historic, contemporary, institutional, and cultural dynamics that routinely privilege white people and disadvantage people of color. Systemic bias continues to produce real inequities, barriers, and

stress for people of color. Practitioners of family-centered coaching often work with families of color, requiring awareness of how pervasive patterns of racial inequities often results in added challenges for families, both external and internal.

### EXAMINING YOUR IMPLICIT BIAS AND MORE:

Becoming aware of your own implicit bias is the first step toward being able to change. Research is still emerging on debiasing strategies. The Kirwan Institute has documented some strategies including training (such as meditation), intergroup contact (interracial exposure and cultural learning), taking the perspective of others (role playing others' perspectives), emotional expression (such as positive and approachable facial expressions), and counter-stereotypical exemplars (having role models who are people of color).

You can get a sense of your own level of implicit bias by taking the Implicit Association Test (IAT) – an online test taken by millions of people around the world, administered by Project Implicit, based at Harvard University (<https://implicit.harvard.edu/implicit/>) The IAT allows you to explore bias in more than a dozen different areas – race, gender, disability, sexuality, etc.

Implicit bias is also at the root of micro-aggressions – subtle but offensive comments or actions directed at people of color or other marginalized people, which unintentionally reinforce stereotypes (<http://tinyurl.com/mxaqv2r>).

**Implicit bias** refers to the way people unconsciously and sometimes unwillingly exhibit bias towards other individuals and groups. Many people are not aware of having implicit bias. Implicit bias should not be confused with explicit forms of bias, or racism. Explicit bias, or overt racism, involves conscious and knowing discrimination towards other individuals and groups. Implicit bias can reveal itself in different ways, such as by the words we use to express our feelings and behavior toward people of color. These unconscious mechanisms are deeply embedded in various aspects of our lives, including health care, education, and our criminal justice system. Understanding implicit bias can help free us from guilty feelings about the embedded nature of racism in our society. It can help us recognize that individually we may not be to blame, but that we are all responsible and accountable for confronting racist policies and behaviors.

SOURCE: "What is Implicit Bias?" Within Our Lifetime. <http://www.withinourlifetime.net/2014campaign/Toolkit/index.html>



External challenges may include racial discrimination in employment and housing, or limited access to high-quality educational opportunities and health services. Internal challenges may include the impacts of immediate, chronic, and cumulative stress related to systemic racism, uniquely experienced by each individual and family. Acute and chronic stress can affect daily functioning, physical and mental health, and even life expectancy.

People of color are often individually blamed for problems that are systemic. The blame is often framed as personal responsibility, motivational deficiency, or stereotypes, such as laziness, criminality, promiscuity, immorality, and other derogatory depictions. These dehumanizing assumptions and stereotypes can be held unconsciously, not only by individuals, but also by institutions and organizations, including well-intentioned social service agencies and programs. While some racial bias is explicit and intentional, much of it is unconscious (also called implicit bias) and unintentional.

An awareness of systemic racism and racial disparity statistics can provide a coach with more appreciation for the lived realities, actual challenges, and external barriers faced by many of the parents they are coaching.

**Individual bias** is related to the attitudes and behaviors of coaches of all races and backgrounds that are shaped by their own racial identities and life experiences as well as by societal and cultural influences. These experiences and influences commonly result in unconscious bias. [Within Our Lifetime Network](#), a national organization working to expand public awareness of implicit bias, offers the following:

Examining your own identities – such as race, gender, sexual orientation, ability, age, and size – can help you gain more awareness of where you are privileged or disadvantaged. Reflecting on areas where you may be disadvantaged or marginalized



can help you cultivate understanding and empathy for others who are disadvantaged. Learning about how you are advantaged can help you work with your privilege in a responsible and accountable way so that you are not unintentionally hurting others.

Counteracting racial bias involves more than awareness of racism, it also requires action that deliberately moves our practices toward racial equity. A “Racial Equity Impact Assessment Toolkit,” such as the one done by Race Forward (<http://tinyurl.com/y8t677jj>), is an example of a tool that can help you address racial equity and inclusion on the front-end of decision making in order to prevent unintended consequences later, once decisions have already been implemented. Having a racial-equity focus is critical for supporting the well-being of all families.

In conclusion, it is vital to go into a coaching session aware of any hidden biases, assumptions, or stereotypes that you may hold. It is equally important to understand the role that systemic racism plays in all of our lives, and especially in those of the families with which we work. Your willingness to examine your own possible biases is a key step in preparing for a coaching

session. Examining potential biases is not about making you feel guilty or proud, it is about discovering internal influences that could affect your interactions with your participant. The very act of discovering your hidden biases can propel you to correct for it.



## CHECKING IN

**Think about a time when you went through a challenge or a transformational change in your life. It can be something from your personal life, with your family, or in your work life.**

Did you lean on anyone to help you get through this challenging period? What were three important characteristics about the supportive person in your life?

Reflect on how and why that relationship worked. List three aspects of the relationship that seemed to help you through the challenging time.

- 1.
- 2.
- 3.

How can you bring these features to your work with families? How can your own experience of overcoming a challenge help you to think about families in a different way, with strengths and challenges?

What two or three things do I see here that would be helpful in my work with families?

## KNOW YOUR BOUNDARIES

Staff at all levels and job titles must know at what point they need to seek additional help in working with a participant because of their mental health or other challenges. This can be hard to navigate, as both coaches and therapists focus on helping participants identify goals and transform their lives. However, it's important to watch for signs of when you as a coach should refer a participant for more intensive counseling or mental health services. The guide below highlights some of the key indicators for when a mental health referral might make sense.

An active mental illness, substance abuse, or domestic violence situation may require a referral to additional supports for the participant. There are no hard rules on when and how to address these issues in a way that respects the relationship with the participant. If as a coach you begin to sense that certain topics or issues are beyond your expertise, you should bring up the idea of a referral with the participant and together decide what would be most helpful.

As we outline more fully in Appendix C: Content Modules on page 58, there are also several

simple assessments for depression, one of the most common mental health challenges that parents face. A commonly used tool is the Patient Health Questionnaire-2, which involves asking two simple questions as a first step to help determine if further consultation or referrals might be needed. The scoring for the PHQ-2 goes from 0 to 6. Roughly, anyone scoring a 3 or above should have further assessment (there is a 9-question version) and counsel. More information on the PHQ can be found at [http://www.cqaimh.org/pdf/tool\\_phq2.pdf](http://www.cqaimh.org/pdf/tool_phq2.pdf). Information on the longer version, the PHQ-9 can be found at [http://www.cqaimh.org/pdf/tool\\_phq9.pdf](http://www.cqaimh.org/pdf/tool_phq9.pdf). Remember too that many parents do not test for a depressive disorder, but still have symptoms severe enough to affect their lives and the outcomes of their children. Follow the lead of the parent in identifying what would be most helpful. More information can be found in Content Module: Health and Well-Being on page 85.

Finally, it is important to note that some states have mandatory reporting laws, especially around issues of attempted suicide, child abuse, and neglect. Research your state reporting laws prior to working with participants. If those issues arise while coaching a participant, follow your state's guidelines.

## THE PATIENT HEALTH QUESTIONNAIRE-2 (PHQ-2)

Patient Name \_\_\_\_\_

Date of Visit \_\_\_\_\_

Over the past 2 weeks, how often have you been bothered by any of the following problems?	Not at all	Several Days	More Than Half the Days	Nearly Every Day
1. Little interest or pleasure in doing things	0	1	2	3
2. Feeling down, depressed or hopeless	0	1	2	3

## TOP TEN INDICATORS FOR WHEN TO REFER PARTICIPANT TO A MENTAL HEALTH PROFESSIONAL

### If your participant:

1. is exhibiting a decline in his/her ability to experience pleasure and/or an increase in being sad, hopeless, and helpless (EXAMPLE: The participant may make comments about “why bother” or “what’s the use.”)
2. has intrusive thoughts or is unable to concentrate or focus (EXAMPLE: Your participant reports that she has many thoughts inside her head and she can’t get them to slow down.)
3. is unable to get to sleep or awakens during the night and is unable to get back to sleep, or sleeps excessively (EXAMPLE: Your participant begins talking about not being able to get to sleep or how he just wants to sleep all the time.)
4. has a change in appetite, decrease in appetite, or increase in appetite
5. is feeling guilty because others have suffered or died (EXAMPLE: Your participant reports that he feels guilty because he is alive or has not been injured.)
6. has feelings of despair or hopelessness (EXAMPLE: According to your participant, nothing in life is okay.)
7. is being hyper-alert or excessively tired (EXAMPLE: Your participant reports that it feels like she always has to be on guard.)
8. has increased irritability or outbursts of anger (EXAMPLE: Your participant becomes increasingly belligerent or argumentative with you or other people.)
9. has impulsive and risk-taking behavior (EXAMPLE: Your participant reports doing things such as going on a buying spree without thinking about the consequences of the behavior.)
10. has thoughts of death and/or suicide (EXAMPLE: Your participant makes comments that to die right now would be OK with them.)

Adapted from Financial Coaching: Helping Clients Reach Their Goals. (2011). Washington, DC: NeighborWorks America.

## SECTION 2: BUILDING YOUR SKILLS FOR COACHING

Once you have adopted a family-centered mindset, the next step is to figure out how coaches and participants can best work together at any given meeting or session. The family-focused mindset should be a fundamental underpinning, whether using goal-setting, readiness assessment, or a case-management approach.

Family-centered coaching recognizes that families are most successful when supported by a range of approaches. Different approaches are more effective at different times and for different areas of their lives. How can you better work with a parent to identify the best approach at a given moment, with the goal of moving toward setting and reaching a family's life goals?

Sometimes it isn't possible to start with goal-setting. A family may need immediate case-management support to find housing, or may benefit from a deep set of questions to help uncover where a parent is ready for change. Sometimes that change cannot yet happen for a range of reasons, which may be personal or systemic or both.

Case management and the readiness assessment are approaches that help you and the family move towards goal-setting and acting on changing their lives, and that also recognize that sometimes families need other kinds of discussion and work before moving into goal-setting. We know that because change is not linear, families will benefit from the use of case management, readiness assessment, and goal-setting approaches at different times. A family may start with a goal of finding a job but then lose their apartment. Then the parent and coach may decide to hold off on pursuing that job goal and move into case management mode to solve the housing issues. Or a family member starts with the goal of becoming a nurse, but after many meetings hasn't taken the steps discussed during the

coaching sessions. Then together the family and coach may decide to step back and assess readiness for change using motivational interviewing to help identify what is going on for the parent. Identifying which approach to use when is one of the central elements of family-centered coaching.

As you use these approaches, it is critical that you talk with the parent about the different roles you might play, depending on what the participant would find most useful. This transparency and collaboration with parents provides choice and helps put parents in control of how they work toward their goals and manage their lives and families.

The approaches highlighted in this toolkit are goal-setting towards milestone achievement, readiness assessment, and case management. While there are many other approaches to engage with families, such as mentoring, counseling, solution-focused therapy, and family-support services, this toolkit focuses on these three because they are most readily applied and used by coaches and providers across different fields.

### ASSESSING APPROACH BY UNDERSTANDING STAGES OF CHANGE

Family-centered coaching is informed by where a parent is in their lives. All of us go through a series of steps when making a change in our lives, however large or small. New research about human behavior has illuminated our own stages of change. These stages help identify and understand the steps we all move through to make life changes. They can help you and the parent understand whether a parent



is feeling uncertain about making a change, and can help identify how best to support the parent in moving toward action.

### Identifying which approach to use when is one of the central elements of family-centered coaching.

Most parents want to make changes but there are often long-standing institutional forces, including systemic racism, that impact and prevent families and communities from moving ahead. For example, a parent might be ready to get a job but cannot pursue that goal because the family lacks childcare, or is homeless and has curfews at their emergency housing. Similarly, a parent might want to improve their child's performance in school, but because the poorly funded school has few supports, it is very

challenging to support the child in moving toward that goal.

There is no judgment related to where in the stages of change a parent identifies. Understanding a parent's stage of change is important "because change can be difficult, resistance normal. Understanding the stages of change will help you know where the parent is in the change process and how to coach parents."<sup>1</sup>

As a coach, you know that a parent may be at different stages of change in different areas of their lives. For example, a parent's readiness for work may be different from their readiness to change their parenting skills. Use the stages of change as a guide for how the parent feels about making a change in those two areas as an indicator of readiness for goal-setting. You can then use different approaches with the parent based on different content topics and readiness for goal-setting.

<sup>1</sup> The Prosperity Agenda. (2015) Career and Life Coaching Toolkit: The Career Readiness Project. [www.theprospertyagenda.org](http://www.theprospertyagenda.org)



## CHECKING IN

**Think about a behavior change you've recently tried: quit smoking, lose weight, exercise more, spend more time with your children, etc.**

Can you identify what stage of change you're in?

If you've been stalled in making progress toward the change, what might you find most helpful in moving forward?

What has been helpful in making changes in the past?

## HOW TO USE THE STAGES OF CHANGE TO ASSESS FOR READINESS FOR GOAL-SETTING

Table 1 outlines different stages of change related to the topic and/or goal a participant has identified as a priority. The second column, “Parent’s Perspective,” provides examples of what language a parent might use during a meeting that would signal their readiness for change on a particular topic.

Once you have better sense of where a participant is in the stages of change, you can map that stage to a particular coaching approach.

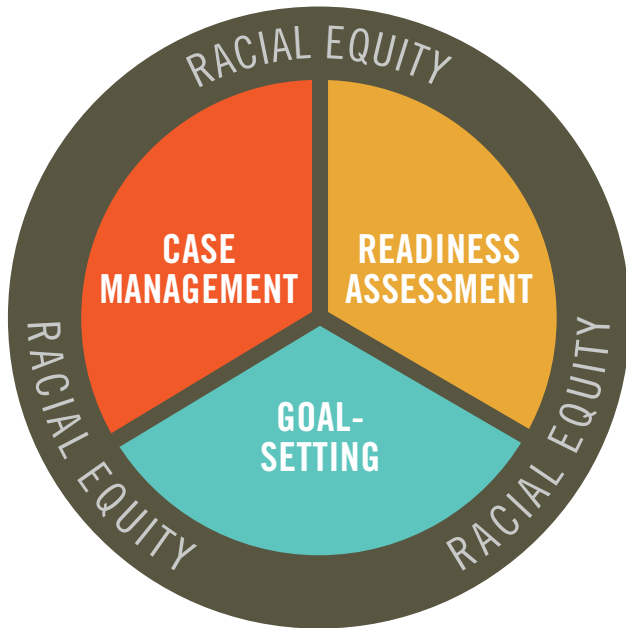
## THE APPROACH WHEEL

Now that we’ve discussed stages of change, we’ll review how you can use case management, readiness assessment, and goal-setting as approaches in your day-to-day work with families. We’ve developed an “Approach Wheel” that puts the three areas together.

**TABLE 1:** STAGES OF CHANGE

STAGE OF CHANGE	PARENT’S PERSPECTIVE	SUGGESTED APPROACH
NOT READY FOR CHANGE	<i>“I need x”</i> <i>“I can’t think about change.”</i>	<b>CASE MANAGEMENT</b>
PRE-CONTEMPLATION	<i>“Change what?”</i> <i>“I won’t.” “I can’t.”</i>	<b>READINESS ASSESSMENT</b>
CONTEMPLATION	<i>“Change? Maybe.”</i> <i>“I might.” “I may.”</i>	
PREPARATION	<i>“Yes. But how?”</i> <i>“I will.”</i>	
ACTION	<i>“I’m ready.” “Let’s do it.”</i> <i>“I am.”</i>	<b>GOAL-SETTING</b>
MAINTENANCE	<i>“How do I keep it going?”</i> <i>“I still am.”</i>	
RELAPSE/RECYCLE	<i>“If I slip, what can I do?”</i> <i>“I’m not sure.”</i>	<b>READINESS ASSESSMENT</b>

## THE APPROACH WHEEL



### WHAT ROLE CAN YOU PLAY TO BE MOST RESPONSIVE TO A PARENT'S STAGE OF CHANGE?

When a parent is sitting with you, it can be challenging to know how to work with them in a way that will best support them in obtaining the results they want for their family. The Approach Wheel is a guide for identifying how to work with a parent at any point in time and for recognizing that the approach needed may change, both during a single coaching session and over the course of the coaching relationship. This fluidity is a hallmark of family-centered coaching.

For example, for a parent who has begun to take concrete steps toward making a change, but now expresses ambivalence about making the change or seems stuck, you may suggest switching from a goal-setting role to readiness for assessment. Until the parent is clear and any concern is resolved, the parent will likely not be able to benefit from a goal-setting approach. When the parent is ready to move forward, you and the parent can shift

back to the goal-setting approach. It is important to keep in mind that family members may be in different places at any one point, and the coach may need to respond to different family goals with different approaches.

The underpinnings of the three areas within the Approach Wheel are outlined below, followed by a guide on how to switch among these three as needed.

### WHEN TO ENGAGE IN CASE MANAGEMENT

In many social services organizations, case management is often the default approach to working with families. It can often be transactional, such as when a participant needs a resource or service, or comes to the agency for something particular or to address an immediate need. It is usually a staff-driven process for actively addressing issues that arise in parents' lives, often identifying and coordinating services from both inside and outside an agency.

Case management is helpful when staff are responsive to participants, follow through on referrals, and help families get the support they need quickly and efficiently.

In case management, the coach is frequently the driver – determining timelines and providing services within the constraints of the system. However, these tasks can still be done with a coaching mindset and call on the strengths and capabilities of families. Case management is helpful when staff are responsive to participants, follow

through on referrals, and help families get the support they need quickly and efficiently. Case management can be unhelpful when families get little access to knowledgeable staff or where expectations are unclear, processes are duplicative and onerous, and are often designed to make it difficult for families to get a service or support. Families sometimes talk about the feelings they get when they work with some case managers – a lack of respect, being looked down on, or making them feel bad about asking for help.

In a case-management situation, a parent taking the lead means:

- asking a parent if they would like you to share information or access to specific resources. The parent decides if and when they are ready to receive that information.
- checking in with a parent for understanding by asking, “Do I have that correct?”

**During the course of meeting with a coach, a parent may have a health crisis that necessitates the coach switching from a goal-setting approach to a case-management approach.** This will help resolve the immediate health crisis by laying out options for a parent, and is made with the understanding that the parent makes the final decision as to how to handle the crisis. Once the crisis is resolved, the coach and parent re-assess the parent’s readiness to move forward on the original set of goals. They then can move to either readiness assessment or actively working on goals the parent has set out through goal-setting. When the coach is transitioning to another role, it is helpful to be transparent about the change with the parent.

- discussing options together, but the parent is one who makes the decision about which to pursue.

Little work on goal-setting or self-reflective observations on one’s own behavior can be done when a person or a family member is in crisis. These may be important times when a coach has information, relationships, or the ability to direct services to a family’s identified needs.

When the parent and coach agree that strengths-based case management should be used to overcome a particular challenge, or that addressing crisis issues might be needed to guide a person toward readiness for goal-setting, then this is family-centered case management. Here’s an example:

## WHEN TO ENGAGE IN READINESS ASSESSMENT USING MOTIVATIONAL INTERVIEWING

A second approach, readiness assessment, is being used successfully with participants across the country to help families move ahead. Often, the tools found in motivational interviewing can help participants explore their desired goals and what might be getting in the way of taking action toward the results. Motivational interviewing is a specific technique for which there are numerous trainings around the country. This link offers a resource on motivational interviewing: <http://tinyurl.com/y82kj3qh>, and the Center on Budget and Policy Priorities has a helpful pocket guide (<http://tinyurl.com/y9p9ubrg>). Our intent here is to offer an overview.

Seen through a racial equity and inclusion lens, the name of this work might imply that people are not motivated and are simply unwilling to change.

However, the intent of motivational interviewing is to uncover the factors that may be keeping a parent from taking action, with an awareness that their inaction may be due to external forces such as institutional racism, discrimination against low-income populations, or biases found throughout our culture and systems. You can use a set of questions that will help them reflect on how they are feeling and thinking about changes in their lives.

As we note in the previous section, two of the stages of change, pre-contemplation and contemplation, involve parents expressing uncertainty or doubt about making changes. All of us have doubts or at times are unclear about where and when we want to move ahead.

The intent of motivational interviewing is to uncover the factors that may be keeping a parent from taking action.

Motivational interviewing before the goal-setting stage frames a set of questions that can be helpful. In some cases, the uncertainty around change may be due to fear of change, to not being aware of options, or to forces outside a participant's control. Motivational interviewing enables the coach to enter into a learning conversation with the parent to identify the source of ambivalence without judgment. This process allows a parent to move forward and take steps toward achieving the change that will positively affect the well-being of their family.

Through motivational interviewing, a coach seeks to meet participants where they are. Coaches empathize and understand participants' perspective and help them recognize their own ambivalence and/or the

structural constraints that may be obstructing their forward movement. By asking open-ended questions, listening, exploring options, and remaining open, the coach seeks to help parents discover their interest in considering and making a change in their life. This leads to readiness for goal-setting.

## WHEN TO ENGAGE IN GOAL-SETTING

When participants are ready to make changes in their life for themselves and their family, they are likely ready for a set of conversations using tools for goal-setting. They are ready to discuss how to support their family around achieving these goals. This approach is used when a parent is in the preparation, action, or maintenance stage of change.

At these stages, the parent does not express ambivalence about making a change and is ready to take concrete steps toward the change. Goal-setting is results-based. If at any point the parent begins to express ambivalence, or is stuck, then it may help to engage in readiness assessment using motivational interviewing – unless the reason for being stuck is driven by a crisis, which may require case management.

In the goal-setting approach, a coach partners with the parent to identify and take steps to reach results that support family well-being. In family-centered coaching, the parent, not the coach, sets the agenda and direction of the coaching, and the coach guides the process. A parent may have several areas of their life in which they would like to make changes and it is up to them to set the priorities. When using this approach, a coach partners with a parent to develop an individualized plan to achieve a milestone that is broken down into a series of smaller goals and steps, tailored to the parent's interests and skills and tracked over time. This plan is flexible, with the timing and pacing set by the parent.



Starting with immediate, small goals that build to larger ones, which we call milestones, helps parents to see immediate results and build goal-setting muscle through success. For example, a milestone may be to get a job. A short-term immediate goal may be developing a resume. Even this can be broken down into smaller goals, such as writing down skills from past jobs or used in their home life and setting up a meeting with the coach to develop a resume. The research on executive-function skills and behavioral change shows that experiencing quick success in meeting goals helps build momentum to keep moving forward toward a larger goal – the milestone. For more information in this toolkit on executive skills, see Section 4: Integrated Lessons from Other Disciplines on page 32.

A goal-setting approach also entails providing scaffolded services. This means working with parents to strengthen or develop planning skills by providing opportunities for them to practice these skills during and between coaching sessions. This process helps parents identify their strengths and understand the transferability of their skills between their home lives, work, and their goal-setting work with a coach. For example, parents use planning skills as they juggle making breakfast, getting children to school on time, and taking public transportation to work or appointments. This is just one example of how you can guide parents to draw upon the transferable skills they use on a daily basis and apply them toward taking steps toward their goals.

## USING THE APPROACH WHEEL

The Approach Wheel helps illustrate these three different approaches to working with families, depending on where they are in their lives and their readiness for change at a given moment. As noted earlier, at the core of family centered coaching is your ability to move fluidly and intentionally among the

approaches, with the intent of moving toward goal-setting. As you move among the roles associated with the various approaches, it is always with an eye on meeting the parent where they are and in partnership with the parent, who is the one taking the lead.

## WHAT DOES IT MEAN TO BE FLUID IN THE USE OF APPROACHES?

Fluidity will look different, depending on how an organization chooses to implement family-centered coaching. In some cases, the three approaches may be spread among several different staff positions, such as a coach, a case manager, and a clinical counselor, at one agency. If this is the case, then strong internal coordination is necessary so that a parent's transition from working with one staff



**TABLE 2:** STAGES OF CHANGE AND FAMILY-CENTERED COACHING APPROACHES

	<b>CASE MANAGEMENT</b>	<b>READINESS ASSESSMENT USING MOTIVATIONAL INTERVIEWING</b>	<b>GOAL-SETTING</b>
<b>WHAT IS IT?</b>	Addresses a specific issue, service need, or response that can be opened or closed over a period of time. It may take the form of crisis intervention.	A coach and parent engage in a learning conversation to identify what is in the way of a parent moving forward.	Regular, parent-driven sessions with parent or family member using a results-based conversation and action plan.
<b>WHEN TO USE IT? (STAGES OF CHANGE)</b>	When parent is experiencing a crisis that needs to be resolved before moving forward on goals.	When parents are expressing a feeling of being stuck or unsure as to readiness to take steps toward their desired result. (pre-contemplation and early contemplation)	When the parent does not express ambivalence about making a change and is ready to take concrete steps toward the change. (preparation, action, or maintenance)
<b>WHO TAKES THE LEAD?</b>	Coach becomes the driver, responsible for meeting timelines and providing services within the constraints of the system.	The coach asks open-ended questions, listens, explores options, and remains open, seeking to help the parent discover what might be impeding them from considering and making a change in their life.	Parent / family driven.
<b>WHEN TO TRANSITION TO ANOTHER APPROACH?</b>	Once the crisis is resolved, the coach and parent re-assesses the parent's stage of change relative to the original goal and parent moves to either readiness assessment or actively working on goals.	Once the parent has identified any obstacles, confirmed their willingness and desire to prepare for a change, and has tentatively committed to a plan.	If at any point the parent begins to express ambivalence or has stalled repeatedly, then the coach switches to readiness assessment, or, in a crisis, switches to case management.

person to another is smooth and seamless, and that staff are clear on their roles. At a minimum, all staff should be aware of the concepts within the three approaches so that they can recognize what – and who – might be needed at a given moment.

In other settings, a coach may be expected to use all three approaches when working with a parent and to move among them as needed. In this case, it is essential that a coach have a clear understanding of when and why they are moving among the approaches. In both cases, communicating and consulting with the parent about the approach is critical in supporting transparency, so that a parent knows when a coach shifts their role.

## IDENTIFYING YOUR ROLE AND AREAS FOR PARTNERSHIP

The Approach Wheel is intended to help you identify your role in the delivery of various family-centered coaching approaches. It can also help clarify and make transparent your role, both within the organization and with the parent. Being clear and intentional about your role and the roles of others you may partner with inside or outside of your organization helps everyone know the boundaries of their work. This in turn helps you deliver effective services to families, and helps identify areas for collaboration and coordination with other staff and/or resources, whether internal or external. Table 2 explains in more detail the crosswalk between stages of change and the different approaches you can use.

## WHAT DOES FAMILY-CENTERED COACHING LOOK LIKE IN A COMPLIANCE SETTING?

Many coaches work in programs supported by funding that requires parental participation or

other kinds of actions in order to receive services or benefits. Coaches are required to work with parents to ensure compliance with the requirements of the program. For example:

- Temporary Assistance for Needy Families (TANF) has work-participation requirements in order for families to receive monthly benefits
- Supplemental Nutrition Assistance Program (SNAP) benefits hinge on a work requirement in those states that have not been granted a waiver from the federal government
- public housing requires reporting of increases in household income.

Workforce Innovation Opportunity Act (WIOA), Head Start, childcare, home-visiting, fuel assistance, and other programs can be less compliance-focused. They often require documentation for eligibility purposes but have fewer sanctions after families enroll for failure to complete an activity or report information.

In those programs that do have requirements, it can seem difficult to take a peer-based, transparent, parent-takes-the-lead approach to working with families. It can particularly affect trust, which is at the core of a coaching relationship, and even more so when a family not meeting requirements may mean a loss of benefits.


## TIPS FOR COACHING IN A COMPLIANCE SETTING

- Supervisors can work with their team to discuss the areas in which there are compliance requirements related to the specific funding stream or program. One method is to create a list of those requirements and use a coaching approach to discuss how to approach them, while recognizing that at the core they are compliance issues.

- Many coaches and organizations use a client agreement form when they start working with new clients. This agreement outlines what the client can assume they'll get from the coach and organization and what they will be required to do in return. Sometimes these agreements cover issues of trust and respect, and describe some of the different roles the coach might play, such as case management, motivational interviewing, and goal-setting. They might also list the requirements of the program and talk about the compliance required to be a part of the organization or services. Using an agreement like the example below sets explicit expectations around compliance conversations up front, offers an explanation of why the compliance work is important to the family, and explains how the compliance and coaching work will be a part of the overall relationship. The agreement helps to make the compliance work transparent

to the participant and avoids surprises when compliance conversations need to occur.

- Identify what information given by parents in coaching sessions outside of compliance must be recorded in files or databases, and whether there is a means to hold separate information on family-focused coaching. Be as specific as possible in determining which information is essential for compliance and which information is helpful for coaching but not directly related to compliance.
- Discuss in your team how to structure your meetings and work with parents. Test out some approaches with parents and ask for their feedback. Coaches in several organizations using the family-centered coaching tools noted that they start with the compliance conversation first, so that there are no surprises later in the meeting after a parent may feel they have communicated information that might affect their eligibility. Transitioning after discussing compliance issues to a goal-setting coaching role may result in the parent revealing a bit less, but it will mean that the parent feels more in the driver's seat of the information they share. In addition, if they need to do work to meet compliance issues, keep in mind it may affect their ability to work on other goals.
- Coaches using the family-centered coaching tools suggest being explicit about this work, saying, for example, "before we start reviewing goals, we have a few compliance details we need to get out of the way" so that it is transparent to the parent that this work needs to be done to keep their benefits and supports. Being transparent with parents about the multiple roles you are playing can be helpful. Let them know that there are some parts of your job that require you to work on compliance issues that are separate from goal-



**Women 2 Work Participant Agreement**

I, \_\_\_\_\_, agree to participate in and receive services from Goodwill Women 2 Work and that all information provided at intake is truthful.

I confirm my marital and familial status fits the following eligibility requirements:

- Single/Never Married, Divorced or Widowed
- At least one child 8 years old or younger enrolled at or receiving childcare services from one of the Women 2 Work referral schools/centers

I agree to be proactive and collaborate with the Women 2 Work Coordinator by:

- Attending scheduled meetings
- Setting and meeting short-term goals
- Developing and following long-term plans
- Following up on all referrals
- Maintaining consistent contact via phone and/or email

I commit to taking active steps towards economic and professional growth by:

- Enrolling in a career training program
- Obtaining and maintaining full time employment upon completing career training

The Women 2 Work Coordinator will support and encourage Participants throughout the course of the program and help to provide a clear career path as well as strategies for advancement in wages and benefits. The Women 2 Work Coordinator agrees to respect and maintain the highest level of confidentiality by not sharing personal information unless authorized by the Participant. Shared information will not be released to third-party entities for solicitation of a product or service.

I agree that the success of the Coordinator/Participant relationship is based on my actions and willingness to work toward my goals. I read this agreement and understand that failure to comply will result in my dismissal from the Goodwill Women 2 Work program and no longer receiving services.

Participant Signature: \_\_\_\_\_ Date: \_\_\_\_\_

setting and moving toward family goals, and that they have to be a part of your relationship with them. Inform the parent of exactly which information you need to record for compliance so that they are aware of those boundaries.

- Finally, coaches suggest being intentional in your transitions between compliance and goal-setting on family goals. You can note in your conversation that you have completed the required discussion on compliance,

and that you will now transition to goal-setting with them. At that point, you might also be determining with the parent if case management, motivational interviewing, or goal-setting is the best activity for the remainder of the session. An example of a coach's compliance meeting with a parent who might not be meeting their work participation requirements under TANF helps to illustrate:

*Before we dive into the goal-setting part of our conversation, we need to talk about the program requirement that you participate in a work activity for 30 hours a week. In the last two weeks you have only participated in a total of 20 hours. Part of my job is to make sure that every participant in the program meets the state's requirements for program participation. Based on the requirements of TANF in our state, you will lose your benefits if you continue at that number of hours each week. Let's talk about how I can support you in meeting your work requirements. We can do some problem-solving and goal-setting on this compliance issue. I recognize it may not be one of your family goals, and I also recognize that if we don't address it I'm not doing the job I am supposed to and you may lose benefits that support your family. Is it OK if we talk about what's going on? I will need to record that we had a conversation and to record your plan for increasing your hours, and I'll need to record at least one reason why it's been hard to reach your requirements, but I won't have to record all of them. Would that be OK?*



# SECTION 3: ADDRESSING THE WHOLE FAMILY

All families have a range of interests they want to pursue across many aspects of life. Interests may be different for each family member, and they will vary over time. The family-centered Wheel of Life provides a means for parents to take the lead by self-assessing seven key life areas for their families, and then prioritizing the area(s) in which they would like to make changes. The Wheel of Life complements the Approach Wheel, and together they form the basis of family-centered coaching.

For each area of the Wheel of Life, there is a content module. In this section, we briefly outline how to use the content modules and provide links to each module. The Wheel of Life can be used with the participant to identify both core strengths and needs, and to assess where families want to focus.

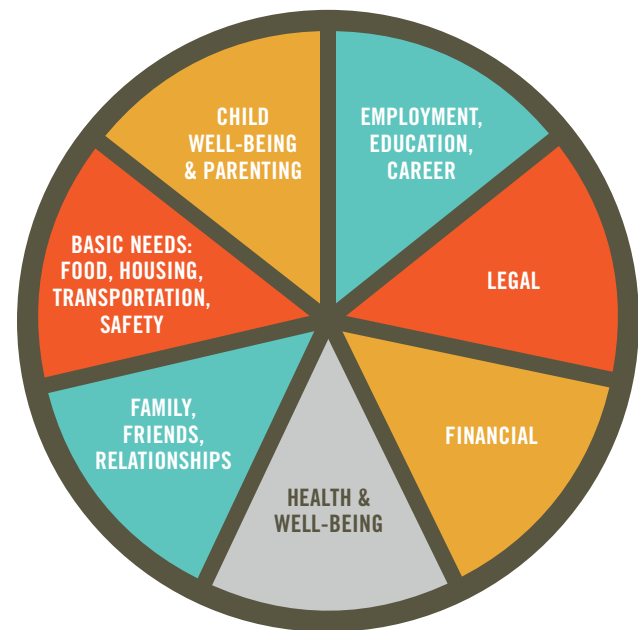
## HOW TO USE THE CONTENT MODULES

The content module for each of the seven topics provides guidance and information on the following:

- why this topic is important
- general tips and advice for coaching on this topic, including how to incorporate a family focus
- powerful questions and other family-centered inquiries
- resources to identify in your community
- general tools and resources related to the topic

Guidance and materials were chosen based on their:

## THE WHEEL OF LIFE



- support of the principles of family-centered coaching
- success in use by organizations working with similar populations and goals
- accessibility and affordability – non-proprietary resources available at no cost
- ease of use for coaching

In preparing to work with families using these content modules, it is key to have culturally competent staff who can interact with a parent in their own language and who know the culture. In addition, as coaches prepare to meet with a parent, they can refer to the coaching resource *Everyday Strategies for Working With Families*, which lists the top 10 things a coach can do to address the impact of stress and trauma on families.

## EVERYDAY STRATEGIES FOR WORKING WITH FAMILIES

Eliminating hassle factors that may affect parent participation is an important environmental modification to be implemented, where possible. These include distance to the location of the coaching meeting, length of forms that parents complete, convenience of hours, requirements for parents to participate in the program, etc.

Knowing that institutional racism, implicit bias, poverty, and inequality result in many families experiencing trauma and toxic stress on a daily basis, you can take action as a coach to help reduce the impact of this stress and trauma when meeting with a parent or family member. Based on the insight into best and promising practices from behavioral economics, trauma-informed care, and executive-skills building, here are 10 things you can do every day:

1. Provide a comfortable, safe, and private space to meet.
2. Ensure that the physical environment reflects and honors the diverse groups in the community.
3. Prepare yourself before every meeting to be a calm presence.
4. Break action items into small, manageable steps.
5. Develop short timelines for completing small steps to support parents in experiencing success early and consistently.
6. Provide choices for parents whenever possible, including when and where to meet, and how they would like to receive services and referrals.
7. Help parents identify ways to set reminders for themselves.

8. Stay positive and build on parents' strengths.
9. Make decisions together.
10. Make information clear, culturally relevant, and easy to read so that it is easy to act on.

Listed below are links to the seven modules:

- [Content Module: Child Well-Being And Parenting](#)
- [Content Module: Employment, Education, and Career](#)
- [Content Module: Legal](#)
- [Content Module: Financial](#)
- [Content Module: Health and Well-Being](#)
- [Content Module: Family, Friends, Relationships](#)
- [Content Module: Basic Needs: Food, Housing, Transportation, Safety](#)

In addition to the guidance and resources for each of the seven topics, this toolkit provides a template for developing a local resource guide for family-centered coaching. This template allows you to include resources for basic needs, education and training providers, childcare, and legal services. You can also include any other resources essential in supporting parents as they move toward their goals. A unique feature of the template is its use of photos of contact staff at referral agencies and pictures of the outside of buildings participants may visit. The template design makes locating and accessing services from different agencies more seamless and familiar to parents by providing them with easy-to-use information. This helps ensure more transparency, coordination, and continuity of support across different social service resources.

# SECTION 4: INTEGRATED LESSONS FROM OTHER DISCIPLINES

## LESSONS ON BEHAVIOR CHANGE FROM TRAUMA-INFORMED CARE, EXECUTIVE SKILLS, AND BEHAVIORAL ECONOMICS

Recent research and practice in working with low-income families offers significant insights and new tools for families seeking to make changes and the coaches supporting them. This section offers lessons from three related disciplines that are very useful in work with families: trauma-informed care, executive-skill development, and behavioral economics. These disciplines set important context

for how people operate in the world, and provide tips for how to make change easier.

All of us are constantly making decisions, big and small, good and bad. People with fewer resources are constantly forced to do more with less. Recent research shows that people with fewer resources have much higher stress levels because of the constant juggling and need to keep a family afloat. Added to this are the underlying and pervasive stressors of systemic racism and poverty, creating an ongoing high level of stress that affects decision-making. Stress results in people focusing more narrowly on the current problem through a process called “tunneling,” which makes it hard to focus beyond the crisis at hand.

Given these realities for low-income people, this section seeks to address ways that you can help reduce this trauma and stress on families so they can move forward more readily toward achieving their goals. The three lenses offered in this section provide insights into best and promising practices on how to optimize and support families in making changes in their lives. These lenses recognize that institutional racism, implicit bias, poverty, and inequality cause many families to experience trauma and toxic stress on a daily basis.

## TRAUMA-INFORMED CARE

### WHAT IS TRAUMA-INFORMED CARE?

While trauma is often thought of as the effect on an individual due to a specific event or incidence related to violence, abuse, neglect, war, or disaster,





### TWO SUITCASES: AN ANALOGY FOR THE IMPACT OF SCARCITY

FROM "POVERTY INTERRUPTED, APPLYING BEHAVIORAL SCIENCE TO THE CONTEXT OF CHRONIC SCARCITY," BY IDEAS42

"Poverty is an especially pernicious form of scarcity because it effectively puts families in a double bind: everyday tasks are more costly, and at the same time, the consequences of mistakes or misfortunes are more severe because families have no cushion to fall back on when an unexpected shock or minor error throws off their tenuous equilibrium. Though simplification

and streamlining can moderate chronic poverty's bandwidth tax by reducing the costs associated with accessing needed resources, these strategies may not address the second major tax on cognitive capacity—the absence of slack, or extra reserves of a resource (e.g. time or money) that families can draw on in case of emergency.

To understand the implications of living without slack, we turn to a metaphor, originally conceived by Eldar Shafir and Sendhil Mullainathan, that features two suitcases.<sup>1</sup> One is large and roomy, with plenty of space for clothing, toiletries, and any other potentially useful items. The other is small and compact, and fitting even the basics inside is a challenge. Packing the first suitcase is a breeze: it's quick work because it doesn't require the packer to make many mentally taxing decisions. Not sure whether you'll need a coat? Throw it in just in case. Can't decide between two pairs of shoes? Grab them both. The second suitcase is more challenging: its smaller size requires you to make tradeoffs. Because space is so limited, you can't bring along anything inessential. You need to accurately predict what you'll need and take the time and effort to pack all of those items (or at least those that fit!) inside the suitcase like pieces in a game of Tetris. When you're forced to pack so leanly, unforeseen events cause problems you are unprepared to address. Should the weather be different than the forecast predicted, or should you stain one of your few shirts, you're out of luck.

This is a rather light metaphor for the very serious ways in which a lack of slack both levies a cognitive tax and leaves families vulnerable to relatively minor shocks. Living in poverty is similar to having a too-small suitcase in the sense that there's no extra "space." Income may barely cover expenses, or fail to cover them all, and there may be little to no emergency savings tucked away... Without slack, slight changes in income or expenses are likely to throw even a very carefully packed suitcase into disarray and leave families scrambling to put things back in place for months or even years."

<sup>1</sup> From "Poverty Interrupted, Applying Behavioral Science to the Context of Chronic Scarcity," pp 29-30, [ideas42, 2015 at www.ideas42.org](http://ideas42.org).

that definition fails to take into account the trauma experienced due to institutional racism and poverty. The McSilver Institute for Poverty Policy and Research states that “the trauma of racism refers to the cumulative negative impact of racism on the lives of people of color. Encompassing the emotional, psychological, health, economic, and social effects of multigenerational and historical trauma, trauma of racism relates to the damaging effects of ongoing societal and intra-social-group racial micro aggressions, internalized racism, overt racist experiences, discrimination, and oppression within the lives of people of color.”<sup>2</sup>

### EFFECTS OF TRAUMA INCLUDE:

IMPAIRMENT OF MEMORY, CONCENTRATION, NEW LEARNING, AND FOCUS;
CORRELATION TO HEALTH ISSUES, SUCH AS HEART DISEASE, OBESITY, ADDICTION, AND CANCER;
IMPACTS ON INDIVIDUAL'S ABILITY TO TRUST, COPE, AND FORM HEALTHY RELATIONSHIPS;
DISRUPTION OF EMOTION IDENTIFICATION, ABILITY TO SELF-SOOTHE, OR CONTROL EXPRESSION OF EMOTIONS; AND
SHAPING OF A PERSON'S BELIEFS ABOUT SELF AND OTHERS, INCLUDING ONE'S ABILITY TO HOPE AND ONE'S OUTLOOK ON LIFE.

Family-centered coaching seeks to develop trauma-informed care approaches and practices that recognize the trauma of racism and poverty experienced by individuals or families in addition to the trauma due to specific events.

The term trauma-informed care may be problematic to some people because it could seem to say people

are stuck or not resilient. The word trauma indicates that external, negative forces are at play – things that are beyond a person's control – and this is the context that trauma-informed care attempts to set. We do not judge a child with a broken leg, or a soldier returning from war. They have experienced trauma that shapes their life experiences. Trauma-informed care works to recognize this context in communities and offers guidance both organizationally and for staff in how to best support families who are experiencing trauma, or may have experienced trauma in the past. The goal of the trauma-informed care approach is to ensure that service systems recognize and respond to the unique needs of trauma survivors.

### WHY IS TRAUMA-INFORMED CARE IMPORTANT TO FAMILY-CENTERED COACHING?

To be most effective, family-centered services must be delivered in a way that is responsive to the impacts of trauma on individuals and families, and that recognizes the trauma families often experience living in disenfranchised communities. Systemic racism and living with a low income create stress and trauma on a daily basis. Organizations and coaches should prioritize creating a trauma-informed care approach regardless of who they are serving. Five principles can help you begin to create a trauma-informed environment and approach to working with families:

1. **Safety:** creating areas that are calm and comfortable
2. **Choice:** providing a parent with options
3. **Empowerment:** noticing capabilities in a parent
4. **Collaboration:** making decisions together
5. **Trustworthiness:** providing clear and consistent information

<sup>2</sup> The McSilver Institute for Poverty Policy and Research, New York University Silver School of Social Work, 2015.



These principles mirror and support those of family-centered coaching. The coaching relationship cannot be built and sustained without parents feeling safe, valued, and in control.

Additional no-cost resources for becoming a trauma informed organization, include:

1. Michigan Department of Health and Human Services' Guide for Becoming Trauma Informed (<http://tinyurl.com/y8va62qc>)
2. A Summary of models and principles from the Substance Abuse and Mental Health Services Administration (<http://tinyurl.com/ybmxekyr>)
3. An infographic on Trauma Informed Care (<http://tinyurl.com/ybpmjxzw>)

## EXECUTIVE SKILLS

### WHAT ARE EXECUTIVE SKILLS?

Executive skills help people set goals to achieve the results they desire. All of us have differing strengths and challenges related to our executive skills. While these skills have a neurological basis and develop most strongly prenatally and into our mid-twenties,

new research shows that we can build executive skills throughout our lives. Our ability to use our executive skills can be diminished by stress and scarcity.

Understanding how executive skills can support or make more difficult each of us reaching our goals is important. As noted by Richard Guare, author of *Smart but Scattered: The Revolutionary "Executive Skills" Approach to Helping Kids Reach Their Potential*, "There is no one skill or cluster of skills that is necessarily better than another. For each of us, the 'best' skills are the ones that allow us to most effectively manage the challenges of the daily living and work situations that we either have chosen or find ourselves in."

Parents and children apply these skills in their daily lives to stay organized and to plan out the day or week. Parents use executive skills to think about and regulate what they are going to say to a child or boss before they say it. We use executive skills when we deciding to get off Instagram or Facebook and start working on a task that we've been avoiding.

The ability to successfully develop and use executive skills is affected by stress, scarcity, and poverty, among other factors. For adults, executive skills are often diminished by stress and fatigue, which, for many of the participants we work with, comes with the daily task of living in disenfranchised communities.

### EXECUTIVE SKILLS CAN BE BROKEN DOWN INTO THREE BROAD CATEGORIES, EACH WITH SPECIFIC SUB SKILLS:

#### 1. HOW WE ORGANIZE AND PLAN THINGS

- organization
- time management
- planning and prioritization

#### 2. HOW WE REACT TO THINGS

- response inhibition
- flexibility
- emotional control
- stress tolerance
- metacognition

#### 3. HOW WE GET THINGS DONE

- task initiation
- sustained attention
- goal-directed persistence
- working memory

## WHY ARE EXECUTIVE SKILLS IMPORTANT FOR FAMILY-CENTERED COACHING?

Understanding a parent's executive skills helps you as a coach know how to help parents use the strong skills they already have and compensate for their weaker skills when reaching for their family goals. Similarly, assessing your own executive skills helps you know your strengths and challenges as a coach, and enables you to find ways to apply your executive skills in supporting families. One powerful way to create a peer relationship with parents is to share your executive-skills profile with them so that together you can discuss and share your strengths and challenges. When a parent understands that everyone has strengths and challenges, it helps you enter into a more equal and respectful partnership.

For a fuller description and a webinar series on executive skills, including how to administer and use the Adult Executive Skills Profile assessment, see:

- Building Better Programs - Executive Skills and Coaching Introduction: <http://tinyurl.com/y8p93p3m>
- Building Better Programs - Webinar Series: <http://tinyurl.com/yblz9bbe>
- Crittenton Women's Union - Using Brain Science to Design new Pathways Out of Poverty: <http://tinyurl.com/y8afan5o>

## BEHAVIORAL ECONOMICS

### WHAT IS BEHAVIORAL ECONOMICS?

Why do we do things we do? Why do we continue to smoke despite research telling us it is harmful? Why do we reach for the extra sweets when we are stressed? Behavioral economics helps explain why we behave the way we do, and uses science to

improve how programs support families in setting and reaching goals.

Behavioral economics also acknowledges that poverty is a context in which so many families live, and which has a greater influence on what we do than our individual traits or actions. A leading non-profit organization in this arena, ideas42, suggests we “fix the context, not the person.” The lack of access to resources and opportunities and the stress created by poverty produces a bandwidth tax on parents – literally putting a strain on a person's cognitive abilities and reducing the ability of individuals to make quality decisions. Indeed, “the behaviors and decisions we may observe among people living with low incomes tell us much more about the condition of poverty itself than about the motives, skills, or character of the people experiencing it.”<sup>3</sup>

A goal of behavioral economics is to respond to the way people are instead of how we think they should be. And it offers a whole range of strategies for individuals, programs, and systems to become more effective in our lives and communities. It offers ways to encourage behavior change, supporting us in making those changes we want to make but sometimes find so hard to do.

### WHY IS IT IMPORTANT TO WEAVE BEHAVIORAL ECONOMICS INTO FAMILY-CENTERED COACHING?

Behavioral economics can help make the road toward goals easier for families, and help programs effectively support families in reaching those goals. Using some basic design principles, organizations and coaches can make it easier to find information, and help families make choices and take steps toward their goals.

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3 “Poverty Interrupted: Applying Behavioral Science to the Context of Scarcity,” ideas42, 2015

Here are some examples of strategies that behavioral economics uses to support family-centered coaching:

**Reduce the cognitive burden on families.** Make information clear, culturally relevant, and easy to read so that it is easy to act on. Break critical and complex steps into smaller, manageable pieces when coaching. For example, a goal of finding a job is made easier when the first step is identify and call three employers with job openings.

**Reduce hassle factors.** Put all critical information, such as coaching dates, phone numbers, and transportation options, in one place so that people don't have to search for them. Use texting and video chat (for example, Facetime, Skype, and Google Hangout) coaching for follow-up appointments in order to avoid long bus rides for appointments. Travel to a location near the family you are coaching so it is easier for them to get to you.

**Opt out.** Develop ways that families automatically benefit from services unless they exercise the choice to opt out. For example, as families sign up for coaching, they might automatically receive text message reminders, unless they opt out of electronic notifications. It's more likely they will get the text messages, which in turn means they are more likely to show up for appointments.

## ENVIRONMENTAL MODIFICATIONS

One aspect of the emerging practices from these three lenses are the modifications that can help you to improve your coaching approach and the environment of your program and organization. Environmental modifications are essentially anything that makes it easier for us to live our daily lives and reach our goals. Many aspects of behavioral economics, such as opting out of services rather than opting in, are examples of environmental



modifications: you don't have to decide to receive the service, it happens automatically. Other examples of environmental modifications include:

**Modifications at home:** Work with families to make it easier to move through a given day. Create checklists for kids of what they need to do each morning to get out the door to school. Identify with parents a place near their front door where they can put all the essentials they need when they leave home.

**Program modifications:** Redesign programs to make them easier for families to access and participate in. Reduce the number of steps a participant needs to go through to become enrolled in a program. Locate services in one place so parents don't have to travel. Break down program activities into small steps and make them clear and easy to follow. Use texting to remind families of appointments.

**Technology modifications:** Identify ways that technology can make parents' lives easier. Set reminders on phones for important tasks. Numerous phone apps help keep track of spending

and to-do lists. Others, such as Woopmylife (<http://woopmylife.org>), which is being tested in public agencies, help set and track progress toward goals.

Many more strategies are offered by ideas42 and others:

- ideas42: [www.ideas42.org](http://www.ideas42.org)
- MDRC: <http://tinyurl.com/jauaz33>
- Prosperity Now (formerly CFED): <http://tinyurl.com/ybbg5tym>



## CHECKING IN

**Everyone has strengths and weaknesses when it comes to executive skills. We learn how to build them and how to adapt for weaknesses, and accommodate around our own skills.**

Think about one particular executive function skill where you excel. Do you remember when you first realized it was a strength? How does this skill help you as a family member? How does it help you in your work life?

Now think about an executive function skill where you are a bit weak. How does it affect you as a family member? How does it affect you at work? What tools or tricks do you rely on to help compensate for the weakness? (Think about technologies, cues, and ways you might avoid leaning on this skill.)



# SECTION 5: PULLING IT ALL TOGETHER – A STEP-BY-STEP GUIDE

## THE FAMILY-CENTERED COACHING PROCESS: GUIDING STEPS

Family-centered coaching focuses on the whole family instead of only on the needs of one person. It also focuses on the interconnected needs a family may have. Family-centered coaching uses a range of approaches to help families meet their goals.

As you work with families, keep in mind the 10 principles and values outlined in the section called What is Family-Centered Coaching. Remember that working with families is dynamic and fluid; it is not a rote process. However, following the framework and general steps we've laid out will help you lead the conversations.

The actual engagement process can be broken into steps. Family-centered coaching incorporates elements from several coaching models, including general coaching using goal-setting, financial coaching, and child welfare coaching. It also brings in lessons learned and applied from motivational interviewing and strong case-management practices. It weaves in best practices from trauma-informed care, behavioral economics, and executive-skill building.

Following are six steps to working with parents using a family-centered approach. At the end of each step, we list both tools to use with parents and resources for coaches. The tools are meant to be shared and used with parents. The coach resources can be used in several different ways to support: the initial training of staff and partners in family-centered coaching; ongoing training and

assessment of a family-centered coaching approach across a program and/or partnership; and a coach's preparedness to practice family-centered coaching on a daily basis. You may not need or want to use every tool every time with a parent. Rather, this toolkit provides you with a set of tools and resources upon which you can draw to support yourself and parents as they move toward their goals. These tools can be found at the end of each Step in the following section and are also located on The Prosperity Agenda's Hub.







## STEP 1: PREPARE FOR THE MEETING

Before each parent meeting, it is essential to prepare yourself to coach from a family-focused mindset. You want to approach each meeting affirming that the parent you are partnering with is resourceful and has the solutions to their challenges. Take a few minutes before each meeting to review the suggestions from the “Ready to Coach Today Checklist” tool. These list quick and easy things you can do to focus your attention on the parent sitting in front of you. Here are a few examples:

- Is your mind racing? Quickly note your thoughts on a piece of paper.
- Are you distracted by what you need to do for work today? Draft a quick to-do-list.
- Unsure of what you want to accomplish in the meeting? Write down one key objective, such as, “listen more and talk less,” or “learn what kind of support the parent wants.”
- Calm your mind by practicing mindfulness. Take 10 slow deep breaths in and out.
- Eliminate distractions by turning off your computer and cell phone.

Set the stage by providing a welcoming space for the parent to enter into an equal partnership with you. Try to have a private and welcoming meeting space that is respectful of diverse cultures. If needed, identify a child-friendly space for children to play so you can meet privately with the parent.

These preparation tips are ways to practice self-care, which is essential to overall well-being even when we’re often not in the habit of making or prioritizing time for them. As you build the relationship, you may want to share how and why you do these preparations.

### COMMENTS FROM COACHES WHO PILOTED THE READY TO COACH TODAY CHECKLIST IN STEP 1:

*“This tool provided a great reminder of what we need to do as caseworkers/coaches to be fully prepared and present when working with our clientele. It opened the conversation about what we do before beginning an appointment to make sure we are fully ready to focus on our client’s needs.”*

*“We have deadlines and are running around meeting outcomes. This tool helps coaches get into a coaching mentality and pickup on the cues of the client, such as body language, as we get more into the family-centered coaching mentality.”*



## TOOLS + RESOURCES

### COACH RESOURCES:

- Ready to Coach Today Checklist
- Everyday Strategies for Working With Families

Go online to view or download **Step 1: Instructions, Tools, and Resources** at <http://tinyurl.com/ycdt2llt>



## STEP 2: BUILD THE RELATIONSHIP

The first time you meet with a parent is the beginning of creating a relationship with them. Relationship-building is an ongoing process. Family-centered coaching takes a strengths-based approach and puts the parent in the driver's seat for determining what result he or she wants to achieve through coaching. It empowers you to use the coaching process in a way that will move the parent toward their desired results. You and the parent are equal partners in the coaching process, but you each have distinct roles: the parent sets the agenda and you guide the process.

When meeting for the first time, be on time to greet the parent and walk them to your meeting space. Ask the parent, "What brings you here today?" The answer will help identify if a parent is in a crisis that needs to be addressed before either of you can focus on building the relationship. If the parent is not in crisis, explain the family-centered coaching process. Show them the family-centered coaching graphic, which shows the six steps of family-centered coaching, and note that it is a means for working together to support achievement of the family's goals. Some programs incorporating family-centered coaching into their work may decide to use some of their existing nomenclature for internal consistency, but be sure to describe the program's participant process using family-centered coaching descriptors.

Review the role of the parent and coach in each step to emphasize that this an equal partnership in which each of you is accountable to the other. As you review the graphic road map, discuss and decide together if there are other expectations for both you and the parent. Sharing the road map makes the family-centered coaching process transparent,

effectively setting the table for establishing an equal partnership in which both you and the parent are full participants. Explain that this first meeting provides an opportunity for parents to identify some initial goals they have for themselves and their family.

In the first meeting you will also want to discuss how often you will meet, preferred communication methods, and any challenges such as transportation, limited time for sessions, etc. Together decide how these challenges will be addressed.

### GETTING TO KNOW YOU: "WHO IS IN MY FAMILY?" AND "MY HOPES AND DREAMS"

A key question on where to begin is asking the participant to identify who is in their family. As stated earlier, family-centered coaching takes an expansive view of intentional and created families in their many varieties. This could be a mother and her children, or a father and his children. A family could include parents, grandparents, and children, foster children, cousins, aunts, uncles, close friends – any person who is considered part of the family. There is no right or wrong way to define family, and who is in the family may change over time.

Other family members usually won't join an actual coaching session, yet their interests within a family are key to helping the whole family move ahead. You can help parents identify who they include in their family in many ways. A good way to start is to acknowledge that there is no one definition of who is in a family, and that it's important for the parent to say who they would include in their circle

## SAMPLE QUESTIONS TO BUILD THE RELATIONSHIP

- Tell me about yourself and your family.
- What are your hopes and dreams for your life and for your family?
- What are you most proud of?
- If our work together were to have a positive impact in your life, what would that look like?
- How do you prefer to communicate with me (meetings, phone calls, texts)?
- How will we know if the coaching relationship is successful?
- How will I know when you are stuck?

of family. Then, either through questions or by using a drawing to illustrate relationships (see the “Who Is in My Family?” tool), the parent can think about their definition of their family.

Questions in this initial conversation could include:

- “If you were to identify the people who you consider to be in your core family, who would they be?”
- “Who plays a role in the day-to-day operations of your home life?”
- “Who else might be thought of as family by others, and do you want to include them in your family circle?”

Next, you will want to learn more about a parent’s hopes and dreams for themselves and their family. Since this is about developing a transformational

relationship with a participant, you begin by asking them about themselves. Start with their strengths and acknowledge the resilience and expertise they bring to this relationship. Use the “My Hopes and Dreams” tool to ask the parent to share their answers. Listen for and reflect out loud the strengths of the parent and the family. Ask the parent to talk about where the family has been successful. This conversation prepares both you and the parent to talk about areas where they want to change and grow, and begins to move your work together to Step 3.

Another part of building the coach-parent relationship is by periodically checking in with each other about how well your process together is working and whether any adjustments are needed. Decide on a regular time to check-in on how the relationship is going. This could be once a month or longer, depending on the nature of your work together. This check-in becomes part of your mutual accountability and recognizes that you are both active participants in making the relationship successful. Here are some questions you and the parent can continue to ask yourselves over time:

- How is the coaching relationship working?
- Are there ways we can improve the coaching relationship?
- What is working well?
- What are obstacles or potential obstacles we need to address?
- What do we need to change in order to make the relationship better?

### COMMENTS FROM COACHES WHO USED THE TOOL *MY HOPES AND DREAMS*.

*“Using this tool made setting goals more relevant. Most of my participants struggle with goal-setting, but using My Hopes and Dreams was easy for them to relate to.”*

### COMMENTS FROM COACHES WHO USED THE TOOL *WHO IS IN MY FAMILY?*

*“This tool was great to use with a client, as it helped her see who is in her court and her support system. It also helped to illustrate where she wants to improve relationships and where some relationships may need to be taken out of their circles, as they can be toxic. It was easy to use and the client enjoyed trying it out.”*

*“Introducing the tool to families, especially those in crisis, to illustrate their actual working support system was helpful.”*



## TOOLS + RESOURCES

### PARENT TOOLS:

- Who Is in My Family?
- My Hopes and Dreams

### COACH RESOURCES

- Family-Centered Coaching
- Step-by-Step Guide to Family-Centered Coaching With Parents
- Becoming an Active Listener

Go online to view or download

**Step 2: Instructions, Tools, and**

**Resources** at <http://tinyurl.com/ycdt2llt>



## STEP 3: FOCUS OUR WORK

If you are in an organization with the flexibility to work with families on a broad range of areas and skills, use the Wheel of Life to begin to help parents identify and prioritize where to focus. Or if you sit within a particular organization, such as a workforce training program or an early-childhood setting, where your focus is on only a few aspects of family life, you can use the Wheel of Life to identify what else might be a priority for the participant. This is especially important because the non-discussed areas of life are often a factor in whether or not the work of your organization with the parent is successful.

The Wheel of Life can be used with parents as a means to open a discussion. The seven sections of the Wheel of Life shown on page 30 represent key areas of family life that need to be addressed and balanced.

The Wheel of Life is one model for focusing the work and identifying parent interests and initial goals, though others are used effectively by practitioners across fields. Whether you use the Wheel of Life or another tool, the goal is to open a dialogue with the parent to acknowledge that they are the experts on their family and the source of their own solutions, and to explore the many dimensions of life that support and challenge parents and families.

Sharing a holistic assessment tool provides an opportunity for the parent to identify their satisfaction with each area in their life. By using a simple rating scale, such as in the Wheel of Life tool, of 1 (very unsatisfied) to 5 (very satisfied) the parent develops a framework for looking at their life. Keep in mind, this process helps parents identify strengths in each area as well as places they would

like to work on. Ask parents to elaborate on how they or their family succeeded in an area. Celebrate the strengths and successes of the parent and family. Even in areas where parents have indicated a need for work, ask them to describe what has worked in that area. As a coach, you can help shine light on strengths the parent may not have been aware of.

For each area of your Wheel of Life, you can ask guiding questions:

- If you were to set a goal to improve one or two sections, what section(s) would you focus on and what would the goal(s) be? Would these be the goals of other family members as well?
- Take a moment to imagine the goal. What does it look like, feel like? What would be different? What would it feel like for your family?
- What would a level 5 look or feel like in this section? What might it look or feel like to other family members? If there is a difference, why might that be?
- How will you know if you've reached a 5?
- In comparison to the 5, how do you rate your current satisfaction? How do you think other family members would rate this area?
- In looking at areas that you rated higher, how can you apply your strengths to areas where you want to improve?

As you and the parent discuss their successes and the levels of satisfaction for each area, you can guide the conversation by asking:

- What might be some opportunities you could use to start moving toward this goal?



- What obstacles might you encounter as you work toward this goal?
- How might you overcome the obstacle(s)? How might your family help in overcoming those obstacles?
- If you were to set a plan right now to begin to work toward the goal, what is one step you could take today or tomorrow?

### COMMENTS FROM COACHES WHO USED THE WHEEL OF LIFE TOOL.

*“This tool is very easy to use. It is great in that first couple of meetings to help figure out what we should be focusing on first. The parent was able to fill it out quite easily and it helped spark a conversation we may not have had otherwise.”*

*“This tool helped my participant shift their perspective about their day-to-day situations. Instead of the over-response to a situation, they have been able to look at the whole picture and not become overwhelmed.”*

*“LOVE THIS tool! I make a habit of letting parents totally customize their sections.”*

*“We’ve made this tool part of our enrollment packet so that the parents can identify where they are at the start of the program. We will have them fill it out again at another point while in the program so they can compare the two or possibly three evaluations. It helped them identify what they would like to work on and helped us identify areas where we can help. It also creates talking points for coaching sessions.”*

Once the parent has identified two or three areas they would like to begin working on with you, ask them what they would like to address first. Addressing each area one at a time can make the coaching conversations more focused and manageable. As you are coaching, be sure to be explicit in asking about, and noting which, if any of the next steps relate to other family members. Ask the parent to identify how moving forward on the area helps the overall family as well as the parent’s well-being. Ask the parent what other family members may think about these next steps and how best to engage them in helping to reach those goals.



## TOOLS + RESOURCES

### PARENT TOOLS:

- The Wheel of Life

### COACH RESOURCES:

- Content Modules
- Template for Developing a Local Resource Guide

Go online to view or download

### Step 3: Instructions, Tools, and

Resources at <http://tinyurl.com/ycdt2llt>



## STEP 4: ASSESS WHAT ROLE TO PLAY

As you engage in conversation with a parent using the Wheel of Life tool in Step 3, you are starting the process of assessing their readiness for goal-setting by setting a clear goal and making a plan to achieve it. Step 4 helps move the process along, making it clear to the parent if they are ready for change. While you discuss areas on the Wheel of Life or other assessment tools, listen for signs of a parent's readiness to move toward goal-setting and planning for a particular area. Very broadly, you'll want to think about three questions and how the answers align with the three approaches in the Approach Wheel:

1. Are they in crisis? (**case management**)
2. Are they still exploring a solution and how they feel about making a change? (**readiness assessment**)
3. Are they clear on their goal and ready to move forward on action steps? (**goal-setting**)

While these are not definitive questions for determining which approach to use, these questions can help discern a parent's readiness for goal-setting. The goal is to move toward coaching on whole-family interests. Plus, a parent's readiness for goal-setting aligns with their readiness for change. As you listen to the parent discuss areas on the Wheel of Life, you can begin to map what the parent says to the stages of change. "What Approach Do I Use?" is a helpful tool for matching language used by the parent with the associated stage of change.

As mentioned earlier in this toolkit, fluidity is a hallmark of family-centered coaching. For example,

### SAMPLE QUESTIONS FOR GOAL-SETTING

- What do you want for yourself?
- What do you want for your family?
- What is your desired outcome?
- If you got it, what would you have?
- How will you know when you have reached it?

this means that when working with a parent in one area on the Wheel of Life, you may start with a case-management approach, while in another area the parent may be ready for goal-setting. If you start with case management in one area, once the issue is resolved, you can check in with the parent to see how they are now feeling about readiness to make a change in the area. If there is still doubt or uncertainty, that then points toward assessing for readiness using motivational interviewing to explore why they are uncertain and to understand what the parents needs to feel ready to move forward toward goal-setting. In other cases, after the resolution of a crisis through case management, a parent may be ready to move directly to goal-setting.

One way to be transparent about moving among the approaches is to discuss with the parent the three different roles you can play as you work together. The avenues you can take are:

- providing your knowledge and access to services to address specific information and/or resources that can be shared when using a case-management approach
- engaging in a learning conversation to explore and resolve doubt and uncertainty when using motivational interviewing
- guiding a goal-setting and planning process when using a goal-setting approach

See the parent tool “Roles a Coach Can Play” for more information. By sharing this tool with parents, you are practicing transparency and providing them choice and support in determining what is most helpful to them in moving toward a higher level of satisfaction in their family life. Being transparent helps keep the parent as the driver of the agenda and maintain a peer-based approach. The parent and coach are in partnership, with each clear on their role and their accountability. This transparency models for parents how and when they can use these approaches when working together as a family to solve problems. It also provides an opportunity for parents to practice self-advocacy by identifying and stating how a coach can best help them. Self-advocacy can also inform their other relationships, including those with other service providers.

One program in which parents meet with several staff for the delivery of overall coaching services uses the Roles a Coach Can Play tool as part of their staff training to help everyone know how to more clearly talk with parents about their roles and how to communicate with parents during the transition among staff. It serves as a way for staff to have transparent conversations with parents.

Together, think about how each identified area affects the other areas. Addressing a crisis in one area may remove an obstacle to moving forward in another area. For example, if a parent experiences a crisis because a childcare provider closes unexpectedly, then resolving the childcare issue may allow the parent to

move forward in a job search. As you work with a parent over time, the areas on which he or she wants to focus may shift, depending on the interests of the family and any issues that arise.

For those areas where a parent’s stage of change indicates they are ready to set goals and make a plan, you and the parent can move to a goal-setting approach, as described in Step 5: Plan, Do, Review.

Many of the coach resources are useful for both initial and ongoing staff training. As one program staff

#### COMMENT FROM A COACH WHO USED THE TOOL *ROLES A COACH CAN PLAY*

*“When I got the tool and shared it with parents, they seemed to feel empowered, knowing that they had all these services for their use. A key note is highlighting the idea that the parent is in the driver’s seat.”*



## TOOLS + RESOURCES

### PARENT TOOLS:

- Roles a Coach Can Play

### COACH RESOURCES:

- The Six Family-Centered Coaching Steps: Roles of Parent and Coach
- What Approach Do I Use? Assessing Readiness for Change
- Transitioning Among the Approaches
- Family-Focused Powerful Questions

Go online to view or download

**Step 4: Instructions, Tools, and Resources** at <http://tinyurl.com/ycdt2llt>

commented on the resource *What Approach Do I Use? Assessing Readiness for Change*, “This was a great conversation for our team to help determine when we wear which hat within our organization. Looking at this tool was a great reminder that we often need to adapt to our client’s needs.”

The “Family-Focused Powerful Questions” tool is useful both for trainings and as a tool for coaches to consult before a meeting with a parent. Coaches can hone their facility with this tool by practicing asking each other powerful questions.



## STEP 5: PLAN, DO, REVIEW

In the previous steps, you started the process of building the relationship, getting to know the parent's current situation and what they hope to achieve, and determining readiness for goal-setting by assessing the stage of change. When a parent is ready for goal-setting in a particular area, you and the parent now move into Step 5 and focus on the goal-setting process. As noted earlier, this process includes identifying a milestone, or larger goal, and then setting a smaller goal(s), making a plan for how to reach that goal, and carrying out the plan. By setting smaller, quickly achievable goals that lead to the milestone, a parent builds goal-setting muscle and develops forward momentum with each smaller success.

Step 5 is when the parent makes a specific plan to reach a goal. At this step, the parent refines their goal in a specific area and makes a concrete plan for how to achieve it. View the parent with an opportunity lens and approach them from a strength-based perspective. Understand that the parent is whole and complete already. The parent is an expert in their own life and able to achieve the results they desire.

As their coach, you help parents focus on building on their strengths and in creating a compelling vision for what they hope to achieve in life. As parents articulate goals to you, work with them to use the strategy of Plan, Do, Review as a means to move forward on their goal. Below are the key components:

- Develop a family goal statement
- **PLAN:** together brainstorm answers to:
  - **What can you do? What will you do?** The more specific the parent can be as to what this is, the easier it will be to take action.

### SAMPLE QUESTIONS TO PLAN NEXT STEPS

- What opportunities exist?
- Which steps come next?
- Which strategy will you take?
- What will you do to reach your goal, and by when?
- What concrete steps can you take now?
- What obstacles might get in the way?
- How will you overcome those challenges?
- How can you get support from family, friends, and others to achieve your plan?
- Will this plan get you to your goal?

#### - **What role can family members play?**

Encourage the parent to enlist the support of family members and to think about how to approach those members for assistance. This is an opportunity to refer to the tool, *Who Is in My Family?*

- **Who will carry out the steps (parent, family members)?** There may be a series of small steps, some taken by the parent and others by family members.



- **When will it be done?** You and the parent may want to set timelines for each of the small steps and then an all-done date for completing all steps. This way the parent can see movement and success along the way.
- **Where will it be done?** Are there things to do in the home? At the workplace? At school?
- **DO:** This is when the parent and family carry out the steps outlined in the plan.
- **REVIEW:** Together, in a subsequent coaching session, discuss the successes and unexpected outcomes.
  - How did it go? Did things happen according to the plan?
  - How did the plan affect the family? Were steps missed?
  - Did things happen on time?
  - If the plan was achieved, then celebrate that and continue with the plan, making adjustments as needed.
  - If the plan was not achieved, what needs to change? What family support might be needed?
  - What support or resource can you as the coach provide?

To develop the plan steps, the parent generates ideas that can help move them toward their desired result. You can help the parent to first generate ideas by asking powerful questions that evoke solutions from the parent. Allow the parent to reflect and gain greater insight on what is possible. Brainstorming is a technique that can be used during this step to facilitate the parent coming up with new approaches. Provide an objective safe place for them to think out-of-the-box. During this phase, you will encourage the parent to come up with as many

strategies as possible and then assess which strategy, or combination of strategies, may work best. Work toward narrowing the options, then ask the parent to decide which strategy to pursue.

As you begin to work with parents, they will identify a step, or series of steps, that they need to take to progress and achieve their intended result. Breaking the larger step down into smaller steps allows you and the parent to decide which of the steps can be completed between meetings and which ones may need more time. Start with a small step that can be achieved in a short time frame, such as one week. Then build upon the success with the small step to identify another small step toward the larger goal. This helps build momentum and persistence toward their goal.

Coaches have found the use of Plan, Do, Review a useful tool for keeping the parent in the driver's seat. As one coach noted when working with a parent, "When we used this tool, they realized that their priorities were not immediate and decided to change their priority to focus on something they could take action on fairly soon and that was more attainable." In another example, a mother had listed travel as a priority on her Wheel of Life. However, when she went to complete the Plan, Do, Review tool, she decided to rearrange her priorities. Regarding the use of this tool, the coach said, "This was nice, because it allows the parents to make that assessment of what's most important, and not the coach."

Together, map out a timeline for achieving each of the steps in the plan. Work with the parent to think about any potential obstacles that they may encounter at each step. Your role as a coach is to provide support and to make sure that the parent has the resources and support they need for each step. You can also develop a plan to address the anticipated obstacle.

Lessons from the executive skills field suggest there is value in having the parent succeed in smaller initial steps in a shorter timeframe. For example, a

parent may have a goal to help their child succeed in school. An initial step might be to schedule a meeting with the teacher. The steps under this can be: write a list of questions to ask the teacher, draft an email asking the teacher for a meeting, review the email with the coach, identify times the parent can meet with the teacher, and send the email to the teacher. As steps are completed and momentum is gained, steps can be made that reach further into the future. The executive-skills field also suggests scaffolding the coach's help so that it is slowly pulled back as parents demonstrate increased skills in reaching results.



## TOOLS + RESOURCES

### FAMILY TOOLS:

- Plan, Do, Review

### COACH RESOURCES:

- How to Have Effective Brainstorming Sessions

Go online to view or download

**Step 5: Instructions, Tools, and**

**Resources** at <http://tinyurl.com/ycdt2llt>



## STEP 6: PLAN FOR SUPPORT AND ACCOUNTABILITY

The final step in the process is creating a mechanism that holds both the coach and parent accountable for their roles in the coaching relationship. Together the parent and coach should determine what process of accountability will work for them. There are several ways a parent can build in accountability. For example, a parent may decide to give you an update at the next coaching session. Others may call, text, or email you when they accomplish a task. Accountability helps keep the parent on track with their plan and with implementing their next steps. Accountability also gives structure to the ongoing coaching.

Developing support also develops accountability. Help parents develop a support plan that includes others, such as family members, friends, and coworkers. The plan can identify who can support them and how. This also lessens the focus on the coach as the sole support and helps parents develop their personal networks. Some of the questions you may ask parents to help them develop a support plan are: Who can support you (family, friends, others)? What specific form of support can they provide? How will you ask them for support?

Remember that accountability is not about judging, scolding, or blaming. If a parent doesn't complete the task they committed to, this is an opportunity for you to explore what hindered them. Perhaps the parent needs more support to complete the task, or perhaps it turned out to be the wrong task, or wrong timing, or the task needs to be broken into smaller steps. Or perhaps unforeseen circumstances arose beyond the parent's control. Accountability

### SAMPLE QUESTIONS TO CREATE A MECHANISM FOR SUPPORT AND ACCOUNTABILITY

- What will you do?
- When will you do it?
- How will I know?

simply is a process to help parents have a structure for achieving what they committed to do. If a parent does not achieve the steps they had hoped to achieve, the coach can turn this into a learning opportunity. Explore with the parent what worked. What did not work? What would you do differently next time? What do we need to change here so you can succeed? What can I do to support you?

As the coach, you are accountable to the parent, some of the ways in which are listed below:

- Respond in a timely manner to phone calls, texts, emails, or other forms of agreed-upon communication. Decide together if you will respond within 24 hours, the next work day, or some other time period. Discuss if there are occasions when the parent may need a quicker response and how the parent will communicate that to you.
- Provide resources and information requested by the parent in the timeframe noted in the plan in Step 5.

- Provide a safe and welcoming space for each meeting.
- Participate in a discussion on how the coaching relationship is going.
- Ensure that the parent knows who to contact in case of a crisis situation.

Step 6 is also an opportunity for you and the parent to establish accountability for revisiting how the coaching relationship in general is working, as noted in Step 2: Build the Relationship.



## TOOLS + RESOURCES

### FAMILY TOOLS:

- Plan, Do, Review

### COACH RESOURCES:

- How to Have Effective Brainstorming Sessions

Go online to view or download

**Step 6: Instructions, Tools, and**

**Resources** at <http://tinyurl.com/ycondt2llt>

## NEXT STEPS AND ONGOING MEETINGS

All the steps can be done in an iterative process as you meet with families over time. In each session, you might need to revise where the participant is in a state of change, and what approach will work best for that day. In particular, Step 5: Plan, Do, Review, can be used during goal-setting periods of work with a family as a check-in and as a way of allowing you and the parent to recalibrate the approach and measure success.

Remember that while a parent may have been actively ready for goal-setting in an area, that can change as family interests and circumstances change. If a family member gets sick and needs care, the parent may need your help identifying health services. That may necessitate moving from actively coaching to moving to a case-management approach. You and the parent are continually

reassessing what would help the parent move forward at any point in time. A parent might also achieve a goal in one area and be ready to start on another area in the Wheel of Life where they want to make a change. They might then start with a readiness assessment, or perhaps will be ready to dive into goal-setting, building upon their experience of accomplishing the previous goal for their family.

Each follow-up meeting is an opportunity to hold yourself and the parent accountable by reviewing and discussing progress on action steps. These may be goal-setting steps from Plan, Do, Review, or steps taken between meetings to address a case-management issue or to help a parent further explore their interest in and readiness to make a change.

# APPENDIX A: COACHING AND TROUBLESHOOTING/FAQS

*I'm not sure the parent is ready for coaching. How will I know they are ready?*

If the parent has identified a goal or a result they want to achieve, they are ready for coaching. You can help the parent to identify a goal by using motivational-interviewing techniques. In addition to working with parents to identify a goal, it is also helpful for you to assess your own view of the parent. Do you view the parent as resourceful and having the solutions to their challenges? Do you have biases or stereotypes that could be blocking you from seeing the parent from a strengths-based perspective? See the Preparing for Coaching section of the toolkit for more information.

*How do I ensure that I am continually holding the parent's agenda and aspirations?*

If you think that you are occasionally coaching the parent toward your own agenda, take steps to ensure that you focus solely on holding the parent's agenda. Start by assessing your view of the parent. Do you view them as resourceful, or do you think they need your help? Do you believe the parent has the answers to their challenges, or do you view yourself as the expert? If you answered yes to the second part of either of these questions, you may be pushing your own agenda rather than the parent's agenda. If you are unable to view the parent as the expert in their life, you will have a tough time holding their agenda.

If you view the parent as resourceful but are slipping into old habits of having to be the expert, identify strategies to keep a parent's agenda at the center of the coaching. Periodically check in with yourself

to make sure you are letting go of your opinions. Post reminder notes around your work space that the parent has all the answers. Check in with the parent to confirm that the coaching is helping them to achieve the result they want to achieve. This, however, does not mean that you should hold back on sharing helpful information or resources that the parent may not know about. After you have given the parent an opportunity to access and share what they know, you can ask, "Would you like me to share with you a resource or idea that might be useful?" If they are open to this, then you can share it with them. Avoid suggesting or steering them toward a particular solution. Rather, offer useful information that may help them discover a way forward.

*I feel like I am doing the heavy lifting in coaching sessions. What can I do differently?*

If you pose a question to the parent and they are completely silent or give short "I don't know" responses, you may be tempted to jump in and help them find the answer. Don't. Resist the temptation to help the parent. Let the silence do the work for you. Get comfortable with silence. It is often during silence when the parent is coming up with the answer. If the silence lasts too long, ask a follow-up question, such as "What's the first thing that comes to your mind?" Or get the parent to continue to reflect and find their own answers.

If the parent is stuck, also consider whether you are asking the wrong question. Is your question too complex? Try asking questions that begin with "What" instead of "Why" to see if that makes them easier to respond.



***The parent can't identify a goal. How can I help?***

If a parent doesn't have a clear goal, if they are unsure what result they want to achieve, or if they are unclear about what they want out of a coaching relationship, it can be challenging to coach them. Start by helping the parent become aware of what they want to accomplish in the future. Visualization can be a powerful tool to help parents see possibilities. Help the parent to identify their personal values, preferences, needs, and skills. Motivational-interviewing techniques and tools such as the Coaching Wheel can help a parent better assess where they are now and what they want to accomplish in the future.

***The parent doesn't want to address their goals for their children or family members in our coaching sessions. What should I do?***

The parent directs the goals and desired results that they want to discuss, so you can't force the parent to discuss goals for their family if they don't want to. However, during Step 1: Design the Relationship, you and the parent agreed that the focus of the coaching would address the whole family. If the parent doesn't want to address family goals, revisit Step 1 to uncover the parent's reason for not discussing family goals. Perhaps they want to build a relationship with you first before discussing goals for the family. Although you should respect the parent's wishes not to discuss goals for their children and family members, consider asking powerful questions to encourage the parent to discover how their children and family members may impact the goal they are pursuing.

***The parent won't commit to take action. What can I do to help them move forward?***

The purpose of coaching is to support the parents to make changes so that they achieve their desired

results and will be accountable for their future. Start by recognizing that there are legitimate obstacles – including structural and institutional racism – that may prevent them from moving ahead. Once you have explored and validated potential obstacles, revisit the parent's goal.

Start by confirming whether or not the goal is the right one. Can the goal be broken into smaller, more manageable steps? Is the timing right to tackle the goal? Review these questions with the parent and make any necessary adjustments to the goal. If the parent confirms that the goal is the right goal and it doesn't need to be adjusted, explore the parent's level of commitment to the goal. Ask, "On a scale of 1 to 10, how committed are you to making this happen?" Find out what needs to happen to increase their commitment level. Lastly, other priorities may be preventing the parent from focusing on their goal at this time. If this is the case, explore ways to support the parent to address their priorities and come back to the goal at a later time.

***The parent seems to want me to solve their problems. How can I help them own their own power and help them to find their own solutions?***

Your role is to guide the parent, not to solve their problems. As a coach, you should continually view the parent from a strengths-based perspective, even if the parent is unable to see their strengths and resourcefulness in the moment. Your job is to ask the powerful questions and get the parent to develop their own solutions. If you give the parent the solutions, you are not providing them an opportunity to grow and to find the solutions on their own. Giving solutions also creates a reliance on the coach, rather than reinforcing the parents' confidence that they have all the answers.

*The parent seems unable to manage their emotions.  
What should I do?*

Occasionally, a coaching session can elicit strong emotions from a parent. As a coach, you want to have empathy for the parents you work with as well as hold them as resourceful and able to find their own solutions. Have an empathetic attitude, allow parents to share emotions, and then support them to create solutions and focus on the future. If a parent is unable to focus on the future and is unable to

manage their emotions, they may need more support than you can provide as a coach. In Section 1, the When to Refer box provides guidance for making a referral to counselors, therapists, and other service providers. You can also reflect upon the kind of questions that you asked that may have elicited the strong emotion. For example, you're more likely to elicit a feeling if you ask how they feel about something, rather than, "What do you think you could do to move forward?"

# APPENDIX B: COMMONLY USED COACHING SKILLS

There are a variety of skills that you can use during a coaching session. After reviewing a number of coaching curricula, below is a list of commonly used skills that are applicable for family-centered coaching. A matrix of the components of these different coaching models is included in the family-centered coaching section of the toolkit.

## ASKING POWERFUL QUESTIONS

The hallmark of coaching is your ability to ask powerful questions. Powerful questions evoke clarity, action, discovery, and insight. Powerful questions are open-ended rather than yes or no questions. They help the parent to discover new possibilities and new learning, and to strengthen their vision.

## HOLDING THE PARENT'S AGENDA

During a coaching session, you must let go of your own opinions, judgments, and answers. Instead, the goal is to follow the parent without knowing the right answer, giving solutions, or telling the parent what to do. Holding the parent's agenda requires you to put the whole attention on the parent and the parent's agenda, not your own agenda for the parent.

## VISIONING

Visioning occurs when you help a parent to create a strong mental image that inspires them to take action and creates a picture of their future life. A powerful vision is exciting and magnetic and it continually inspires the parent to reach their intended result.

## ACTIVE LISTENING

Active listening involves listening for the parent's vision, values, and purpose as expressed by the parent's words and by their demeanor. You listen with consciousness and your total attention is on listening to the parent.

## CLEARING

When parents are preoccupied with a situation that interferes with their ability to be present during the coaching session, you allow the parent to vent or clear the situation, without judgment or attachment, in order to move on to the next steps. You encourage the parent to clear for a set period of time. After the clearing is complete, you and the parent are able to be fully present for the coaching session.

## BOTTOM-LINING

Bottom-lining is a skill that enables the parent to get to the essence of the communication, rather than engaging in long, descriptive stories.

## REFERRING

If during a coaching session, you discover something that should be addressed by therapy, or that the parent could benefit from services from another organization, make a referral. For information on best practices for making referrals, see the When to Refer box in Section 1.

# APPENDIX C: CONTENT MODULES

## CONTENT MODULE: CHILD WELL-BEING AND PARENTING

### WHY IS THIS TOPIC IMPORTANT FOR BOTH A COACH AND A FAMILY?

Parents play a critical role in a child's health and development. Brain science shows us how child development is supported by positive parent and family interactions. As Head Start notes, "... strong families are at the heart of children's success ... When families are strong and secure, and family outcomes are enhanced, children are more likely to be healthy and ready for a lifetime of learning." For many parents, their child's well-being is a major reason for wanting to make changes in their lives. Knowing how best to support child well-being is a challenge faced by all parents, especially as they juggle the pursuit of pursuing an education,

finding or maintaining a job, and taking care of their family.

Parents, especially parents with low incomes, can be significantly stressed by the challenges of caring for children while ensuring that basic needs are met. All parents need a strong support network of peers and community members to support them as they raise their children. Children's needs vary across ages and over time, with young children demanding time, attention, and care when parents are away at work, training, or at home. Older children need support, guidance, and room to develop their social emotional skills as they transition to young adulthood.

#### GENERAL TIPS AND ADVICE FOR COACHING ON THIS TOPIC

- Come to a meeting with a parent knowing that, as Head Start states, "Families of all types can raise thriving children. This includes families with various care-giving structures, cultural beliefs, socioeconomic levels, faiths, home languages, and countries."
- Remember that the parent is the expert on their own children and their voice is the most important one.
- Approach these topics from a family perspective, asking what the parent's goals are for their children, and how those goals support family well-being from the parent's perspective.
- Value a family's passion. If a family is angry that it can't get needed services for a child, it may look aggressive, but it is essential that you recognize they are advocating for their child. Always seek to understand and value what a family is telling you. With that mindset, together you can make a plan to address their concerns.

- Your role is to listen and share information as requested by the parent. Framing information shared from the perspective of what we have all learned about parenting from families, our own experiences, and research, and how it works, rather than as what is good parenting, helps maintain and reinforce that you are equal partners in the coaching process.
- The topic of child well-being and parenting includes understanding child development, heredity and environment, parent and child interaction; raising resilient children; and respecting cultural norms.

## POWERFUL QUESTIONS AND OTHER FAMILY-CENTERED INQUIRIES

- What are your hopes for your child? What would that look like?
- What does your child need to succeed?
- What do you want to be able to do for and with your child? Who is available to help you?
- What are your worries about your child? What keeps you up at night?
- What are your biggest worries as a parent?
- Are there areas in which you'd like support or help in raising your children?
- Do you have a network of other parents to lean on when you need advice on parenting?
- Are there areas of parenting that you are proud of? Areas you'd like to improve?

### **MORE SPECIFIC QUESTIONS FOR CHILD CARE NEEDS INCLUDE:**

- What are your child care needs? Include early child care and before/after-school care.
- What is the cost of child care? How it is paid for?
- What subsidies are available? Do you know where to access quality child care?
- What is the quality of the care you have? Does it meet the developmental needs of your child?
- What are the types of childcare options you have, and how do they support your goals for your child? What resources/information do you need to choose the highest quality possible, whether it's in formal care or with family members?
- What are your backup plans?
- Are there ways to enlist the support of your family or your circles of support?



**MORE SPECIFIC QUESTIONS FOR OLDER CHILDREN INCLUDE:**

- What is your relationship with your child?
- How do you resolve conflicts and disagreements? Are your discipline strategies working?
- What are the ways you connect with your child about their lives: their hopes and dreams?
- What are your worries about your child? What keeps you up at night?
- What about plans for them after school? As teenagers, what are they doing after school, and what can you do to help them with structure if you are at work?
- Have you discussed with your children how to have healthy relationships and positive friendships?
- Do your teen children have access to high-quality sex education and birth control options to prevent unwanted pregnancy and STD transmission?
- Have you discussed with your children sexual abuse protection and prevention?
- Are any of your children or family members dealing with mental health or wellness issues that may need to be addressed?

**INFORMATION FROM OTHER CONTENT AREAS CAN SUPPORT SUCCESS IN THIS ONE**




This topic ties closely with other topics such as health and well-being basic needs; family, friends, relationships; and financial. Looking at these areas provides insights into other interests, strengths, and potential challenges that can support or hinder a parent’s ability to make progress toward the child well-being and parenting goal.

OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
HEALTH AND WELL-BEING	How is your body, mood, and behavior affected by stress?
	How does your physical health impact your mood and your relationships with your children, your job, and your family?
	What are some of the best ways to ensure health of body and mind?
	How are your children’s health? Are there health concerns?
	What are the social and emotional aspects of your children’s lives? Are they generally happy, content, sad, angry, or clingy?

OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
BASIC NEEDS	Are basic food, housing, and clothing needs met for you and your children?
	Are the children's health needs met?
	Do you have safe, stable, quality care for your young children, for your older children?
	Are older children getting their basic needs met (school, food, housing, clothing)?
	Is there enough money or programming to cover activities for older children's development (sports/after-school clubs)?
FAMILY, FRIENDS, RELATIONSHIPS	Do you have connections to any communities of faith?
	Describe your strongest relationships (family or friend).
	How is your relationship with your older children?
	What strengths in your relationships do you appreciate? What parts might you want to change or enhance?
	Do your children have strong social networks/friends for their healthy development?
	Are there other avenues to explore for increasing your circles of support?
FINANCIAL	What do you need to earn to support your family?
	Is anyone else in the family working?
	What other income is coming into the family?
	What benefit options, if any, may be available?

*The resources identified below are recommended by the Advisory Committee and Topic Experts for the Family-Centered Coaching Toolkit.*

## FOR YOUR TOOLKIT: IDENTIFY RESOURCES IN YOUR COMMUNITY

-  Parents are the experts – ask them where they are telling their friends to go for local resources such as preschools, Head Start, pediatricians, public schools, child care, family resource centers, and parenting support.
-  Check with your local Head Start programs as they are required to develop a community resource guide for families (health, fuel, library, parenting support), including eligibility criteria and hours of operation.
-  Check with your local YMCA/YWCA, or Boys and Girls Clubs for activities and supports for older children.

### TOOLS/RESOURCES:

#### Health Insurance

*Information on accessing health insurance for your children which covers well visits, prevention, dental care, and immunizations, among other supports*

<https://www.healthcare.gov/medicaid-chip/childrens-health-insurance-program/>

#### American Academy Of Pediatrics Health Children Website

*Information on a range of topics across the ages and stages of children's lives from pre-natal to young adult. Information available in English and Spanish*

<https://www.healthychildren.org/English/ages-stages/prenatal/Pages/default.aspx>

#### National Center on Afterschool and Summer Enrichment

<https://childcareta.acf.hhs.gov/centers/national-center-afterschool-and-summer-enrichment>

#### Finding Quality Child Care:

*Tips and linkages to local child care agencies*

<http://childcareaware.org/families/choosing-quality-child-care/5-steps-to-choosing-care/>

#### VROOM

*Vroom shows how to make parent-child engagement fit within the schedule of family routines and work.*

<http://www.joinvroom.org/tools-and-activities>

**Seven Tips for Practicing Positive Discipline**

[http://www.pbs.org/parents/talkingwithkids/positive\\_discipline\\_tips.html](http://www.pbs.org/parents/talkingwithkids/positive_discipline_tips.html)

**Use Positive Words**

<http://tinyurl.com/y92qsemq>

**Our Morning Routine Chart**

<http://www.withherownwings.com/our-morning-routine-chart/>

**GENERAL GUIDES/CURRICULA:****Video Series from Head Start – Parent, Family, and Community Engagement Simulation: Boosting School Readiness through Effective Family Engagement**

*This is a series of video simulations to help you explore and practice everyday strategies to develop Positive Goal-Oriented Relationships with a family. These relationships are key to our work with children and families, including the journey toward school readiness. Simulation 1, Engaging Families From the Start allows you to practice building bonds with families, beginning with an intake visit. Simulation 2, Goal-Setting with Families explores the process of developing and implementing goals with families. Simulation 3, Starting with Strengths in Challenging Times explores using strengths-based attitudes to partner with families during challenging times.*

[https://eclkc.ohs.acf.hhs.gov/hslc/tta-system/family/pfcea\\_simulation](https://eclkc.ohs.acf.hhs.gov/hslc/tta-system/family/pfcea_simulation)

**Tips for Talking with Parents about Developmental Concerns**

[https://www.cdc.gov/ncbddd/actearly/pdf/parents\\_pdfs/tipstalkingparents.pdf](https://www.cdc.gov/ncbddd/actearly/pdf/parents_pdfs/tipstalkingparents.pdf)

**Video from Head Start – Engaging Fathers**

<https://eclkc.ohs.acf.hhs.gov/video/engaging-fathers>

**Fatherhood Programming Guide**

<https://eclkc.ohs.acf.hhs.gov/sites/default/files/pdf/father-engage-programming.pdf>

**Engaging and Goal-Setting with Families**

<https://eclkc.ohs.acf.hhs.gov/sites/default/files/pdf/engaging-and-goal-setting-with-families.pdf>

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## CONTENT MODULE: EMPLOYMENT, EDUCATION, AND CAREER

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### WHY IS THIS TOPIC IMPORTANT FOR BOTH A COACH AND A FAMILY?

Furthering education and finding stable, living-wage employment are critical to every family's economic stability, and a core of any family-centered work. As a coach, understanding how workforce and education services and programs tie together can help a parent move more efficiently in the direction of their goals. Given the diverse and siloed funding streams for education and employment, programs need to think about how best to leverage and braid funding to support parents in their family-centered goals by combining services that help parents to take advantage of job training and education if they decide this is a goal for themselves and their family. In some cases, this may mean connecting with or supporting families to connect with the local Workforce Innovation and Opportunity Act (WIOA) partnerships to be able to access training vouchers, referrals or support services for parents. As a coach, it can also mean identifying targeted job training programs with parents receiving Temporary Assistance for Needy Families (TANF) or Supplemental Nutrition Assistance Program (SNAP) benefits while also partnering beside the family to figure out how to access child care or after school supports. Knowing local adult education providers to assist parents in increasing their English proficiency or to enroll in a high school equivalency program can be key steps toward helping a parent and their family reach their goals. Community colleges offer certificates and associates degrees leading directly to in-demand jobs. In some cases, it may mean helping a parent determine the best way to combine work and education. It can also mean helping them identify education financial supports such as the Pell Grant and other financial aid opportunities.

The general steps for coaching on employment, education, and career are:

- (1) **Help people to identify a work or a career goal.**  
This includes encouraging people to move toward higher-paying jobs. Help parents identify what higher-paying jobs are available in their area, what they need to do to obtain those jobs, and what constitutes a “good fit” between their skills, interests, and values, and the job requirements. This conversation might be the focus of an initial coaching session. Do they have a job/career in mind, or would they like to explore options?
- (2) **Help people map out a plan to get from where they are to where they want to go.**  
Do they need more education and training? Where do they get it? How will they pay for it? How long will it take?
- (3) **Identify the obstacles that might get in the way, and develop a plan for overcoming them.**  
Develop an action plan using the Plan, Do, Review tool. What steps will they take in a prescribed time period, e.g., the next week or month?

In addition, this topic:

- Supports whole-family economic well-being.
- Begins to address how racial biases, discrimination, and institutional barriers impact education and job attainment.
- Provides guidance on developing a career and establishing economic well-being - a journey that a parent will continue long after they have completed your program. Providing guidance on this process and helping them practice and strengthen these planning skills sets them up for success.



### GENERAL TIPS AND ADVICE FOR COACHING ON THIS TOPIC:

- If getting a new or better job is a goal, then it is important not only to help a parent obtain a job, but also to provide them with information on opportunities for increasing their skills so they can qualify for better-paying jobs. Even though parents seeking jobs can be facing numerous challenges, they also have incredible strengths. Helping families uncover and remember their supports, such as family, neighbors, community programs, spouse/partner, school, church, and support group, is one of the best ways to begin this dialogue from a strength-based approach, right from the start. This is good way to talk with families who may be interested in taking the next steps in training or education, given that few jobs pay enough to support a family unless you have either industry recognized credentials or other post-secondary education.
- Let the parent know you will continue to be there to help them through the process and that they can tell you what works best for them and their families. If your program isn't equipped for long-term coaching, discuss with the parent if they would like your help in identifying other resources that can support them in the long run, and work with them to ensure a continuity of services.

Understanding these elements is essential for a parent:

- What skills do they have? Do they have prior work or volunteer experience that is transferable to other jobs? These are strengths the parent brings to a job search. Knowing the answers to these questions helps a parent determine what they want to do, and know how to market themselves for a job.
- What supports do they have to address any constraints? Do they have access to child care subsidies, or to family members who can provide child care, after school care, or transportation access? Do other members of the family provide income? Are they able to work flexible schedules? Does the family receive benefits or services from a particular kind of program that has education or training funds, like TANF or SNAP? Reassure the family to let them know it is OK to start small, and that you will work together to achieve success a step at a time until any constraints are less and less.
- Here are some specific techniques to help make the process of finding a job or determining options for education and training more manageable for the parent:
  - Create a short time horizon: What would you like to accomplish in the next month? If your program is of fixed duration, ask, "What would you like to accomplish in your time here?"
  - Be clear on what are your program's goals, and keep goal-setting and milestone achievement within those parameters. For example, you can say, "We can get you this far and then connect you with other services and supports for this part."
- Keep in mind bias and stereotypes.

Gender bias includes:

- Guiding women to enter nursing, teaching, domestic work, or other helping professions, and not exploring other options.
- Assuming women are supposed to make less money than men.

- Accepting the conditioned belief that women are not as qualified or competent for a job as men.
- Guiding men to enter construction, technical, mechanical, or professional careers, and not exploring other options.
- Assuming men are best at being in charge at work.

Racial bias includes:

- Guiding Asians into technical and math-oriented jobs, guiding away from managerial jobs.
  - Guiding African-Americans or Latinos away from higher-level jobs or professional jobs, such as computer programmer, engineering technician, sales representative.
- If a parent has experienced race/gender bias or discrimination in previous jobs, help them think about:
    - What are things they can do to mitigate that in the next interview or job?
    - What are they looking for in an employer and a supervisor to help prevent being in a bad situation again?
    - What can you learn from the experience of bias or discrimination?
  - What do you like to do?
  - What do you think you're good at?
  - What makes you happy? What makes your family happy?
  - What type of environment do you want to work in?
  - What type of employer do you want to work for?
  - What do you NOT want to do?

## POWERFUL QUESTIONS AND OTHER FAMILY-CENTERED INQUIRIES

- What would your ideal job look like?
- What are your family's aspirations and strengths? How can those help you in setting an education/employment/career goal?
- How much do you need to earn to meet expenses and goals?

Be intentional and explicit about asking about a family's situation. Then you and the parent together can begin to understand how the family situation affects decision making.

- What are the job hours that work best for your family? If a job has odd hours, evenings, or weekends, can the family help out? If not, what are the hours that will work, and which jobs are a good match?
- Is your family supportive of your goal of getting a job?

- Is the occupation favorably viewed in the family’s culture? If not, is that impacting the parent from moving forward? If so, how can it be addressed?
- Are there other things to think about from the perspective of your family?
- Are there physical/health limitations that need to be addressed?

### INFORMATION FROM OTHER CONTENT AREAS CAN SUPPORT SUCCESS IN THIS ONE






This topic ties closely in with other topics such as child well-being and parenting; basic needs; financial; and legal. Looking at these areas provides insights into other interests, strengths, and potential challenges that can support or hinder a parent’s ability to make progress toward employment, education, and career goals.

OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
<p><b>CHILD WELL-BEING AND PARENTING</b></p>	<p>What are the ages of your children?</p> <ul style="list-style-type: none"> <li>- What child care, education, and/or after school needs do they have? What happens in the summer?</li> <li>- What extra-curricular activities do they have?</li> <li>- Do you have other support in your family, in the community, or with other parents where costs can be shared?</li> <li>- How does the timing and/or extra cost compare to what the job pays or might pay?</li> </ul>
	<p>What child care is needed, and what are the options?</p>
	<p>Are there child care subsidies available for working parents?</p>
	<p>What are your backup plans for child care?</p>
	<p>What hours are needed to support attending school, training, or a job?</p>
	<p>How far is it from school/job/home?</p>
	<p>Who in the family can provide support?</p>
	<p>What are the medical needs of your children or other family members?</p> <p>For example, if a child has asthma, a parent may have to attend many doctor appointments or administer meds, making it necessary to have a job either with flexibility or with limited hours.</p> <p>Follow-up questions might include, “How can we address meeting these costs? Have you looked at any options?”</p>

OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
BASIC NEEDS	How long is the commute to school/training/job? Where is your children’s school/child care in relation to the jobs you are thinking about, and how will you get to each place on time?
	Is there public transportation or a car to use?
	Is it reliable? Does it meet the hours needed?
	If others are working, what are their hours and transportation? This information helps budget for time and other costs.
	What are your backup plans?
	Have you thought about carpooling with family or neighbors? How will this impact childcare arrangements?
	How else can you enlist the support of family and friends?
FINANCIAL	What do you need to earn to support your family? You should come ready to address this as the family may not know.
	Is anyone else in the family working?
	What other income is coming into the family?
	Do you need to work while in training? This may point toward training programs with stipends, or to training programs with different hours.
	Are you aware of any benefit options that may be available? Mention any you know of.
LEGAL	Do you have any past criminal background that could affect your employment?
	Do you know of ways we can address this? The more the coach can become familiar with options for dealing with criminal records in your state/city, the more options you can suggest to the parents.

*The resources identified below are recommended by the Advisory Committee and Topic Experts for the Family-Centered Coaching Toolkit.*

## FOR YOUR TOOLKIT: IDENTIFY RESOURCES IN YOUR COMMUNITY

-  One Stop Career Centers
-  Skills training providers (This can include community-based organizations, technical schools, and community colleges.)
-  Community Colleges
-  Adult basic education and ESOL programs
-  SNAP Employment and Training Programs

### TOOLS/RESOURCES:

#### **My Next Move**

*This website helps people figure out what they want to do for a living.*

<https://www.mynextmove.org/>

#### **Skillful.com**

<https://www.skillful.com/>

#### **Knack**

*People use Knack to identify their interests and career pathways, and connect with job opportunities.*

<https://www.knack.it/apps/index.html>

#### **Promising Occupations for Low-Income Families by State**

<https://www.mathematica-mpr.com/our-focus-areas/family-support/data-visualizations/tanfmap>

#### **Building Foundations for Economic Mobility Webinar Series, Head Start: Early Childhood Learning and Knowledge Center**

<http://tinyurl.com/y75ogxsf>

#### **My Skills My Future**

<https://www.myskillsmyfuture.org/>

**What a Family Needs to Get By**

<http://www.epi.org/publication/what-families-need-to-get-by-epis-2015-family-budget-calculator/>

**GENERAL GUIDES/CURRICULA:**

**Empower Your Future: Career Readiness Curriculum**

<http://tinyurl.com/ydavap33>

**Resources for Connecting TANF Recipients and Other Low-Income Families to Good Jobs**

<http://tinyurl.com/ya8t5mrq>

**MOMS Partnership: Personal Skills for Work Success**

*Contact staff for free copies*

[newhavenmomspartnership.org](http://newhavenmomspartnership.org)



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## CONTENT MODULE: **LEGAL**

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### WHY IS THIS TOPIC IMPORTANT FOR BOTH A COACH AND A FAMILY?

Legal issues may arise in a number of ways and should be considered within each of the modules. However, the serious problems legal issues can cause for families on their journeys toward family well-being warrant special consideration. According to the American Bar Association (ABA), roughly 40 percent of low-income families experience a legal problem each year.<sup>1</sup> When expanded to a broader category of civil justice situations – circumstances that more loosely involve a legal matter – the ABA has more recently estimated the number at 80 percent for low-income families.<sup>2</sup> In general, the biggest legal needs for low-income families are family issues, such as divorce, custody, domestic abuse, support, and guardianship; housing issues, such as landlord/tenant, federally subsidized housing, and foreclosures; and income maintenance, such as public benefits and unemployment compensation.<sup>3</sup> In addition, many families have legal issues through involvement in the criminal justice system. The fees and fine structures that are imposed post-jail/prison can drain family resources.

The impact of these types of problems can be far reaching, negatively impacting both the individual and their families, with low-income individuals more likely to report a negative consequence (51 percent) from legal problems than high-income individuals (30 percent).<sup>2</sup> Individuals with

unresolved legal issues may risk losing a home, suffering from a loss of needed income, staying in abusive situations, remaining in physically unhealthy homes, or paying avoidable debt.<sup>4</sup> Additional emotional impacts are also common, including feelings of fear, a loss of confidence, and damage to physical or mental health.<sup>2</sup> Children in families experiencing this type of upheaval may experience negative outcomes in child development, school performance, health, and/or family interactions, making children most often the biggest benefactors of legal aid services.<sup>4</sup>

### BARRIERS TO ACCESS TO JUSTICE

Low-income families with legal needs often face both personal and systemic barriers to resolving their legal issues. People with legal needs often do not know where to go for help, do not know they are eligible for free or low-cost legal services, or do not recognize their situation as a legal problem.<sup>5</sup>

In one study, where individuals were asked to characterize their civil justice situation, only 9 percent characterized it as a legal issue.<sup>6</sup> The majority (56 percent) described the situation as “bad luck/part of life” or as “part of God’s plan.”<sup>6</sup>

Individuals with a legal problem often attempt to handle the situation on their own (46 percent) or

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1 LASO Facts and Poverty Statistics. Retrieved from <http://tinyurl.com/y9rejlmf>

2 Accessing Justice In The Contemporary USA: Findings From The Community Needs And Services Study. Retrieved from <http://tinyurl.com/kph6msk>

3 2013 Legal Services Corporation - By The Numbers: The Data Underlying Legal Aid Programs. Retrieved from <http://tinyurl.com/y8j9uzte>

4 Closing The Justice Gap - How Innovation and Evidence Can Bring Legal Services to More Americans. Retrieved from <http://tinyurl.com/ybrc4z6h>

5 Documenting the Justice Gap In America - The Current Unmet Civil Legal Needs of Low-Income Americans. Retrieved from <http://tinyurl.com/qa69js4>

6 Accessing Justice in the Contemporary USA: Findings From the Community Needs and Services Study. Retrieved from <http://tinyurl.com/kph6msk>

through their social networks<sup>7</sup> who often provide misinformation.<sup>8</sup> One study found only 22 percent of individuals reached out to a third party that was not a member of their social network, but

7 Accessing Justice In The Contemporary USA: Findings From The Community Needs And Services Study. Retrieved from <http://tinyurl.com/kph6msk>

8 Documenting the Justice Gap In America - The Current Unmet Civil Legal Needs of Low-Income Americans. Retrieved from <http://tinyurl.com/qa69js4>

not necessarily a legal representative.<sup>7</sup> However, studies have found that often social service agencies and community workers fail to make appropriate referrals.<sup>8</sup> Additional barriers include low literacy, disabilities, limited English proficiency, and culture and ethnic background.<sup>8</sup>

*As a coach, you are in a unique position to identify and make referrals for legal issues that arise.*

### GENERAL TIPS AND ADVICE FOR COACHING ON THIS TOPIC:

- It is often hard for a parent to recognize that a problem is actually a legal issue. Listen carefully when a parent is talking about another topic issue. For example, a parent may say they were hurt on the job and have to be out of work for a period of time. This might mean they are entitled to worker's compensation.
- Some situations may give rise to multiple legal issues. Asking follow-up questions such as "why," "what happened," or "what caused that" may help identify other issues. For example, if a client states they lost their job and was denied unemployment, they may realize they need legal assistance with their unemployment claim. However, a follow-up question of "what happened" may reveal an additional legal issue. For example, if the client reports they lost their job because their child's school kept calling to tell them to pick up the child for behavior issues, there may be a legal issue if the school is not properly addressing the child's behavior. Therefore, the client may have both an employment and a special education issue.
- Parents may not know free or low-cost legal help is available. They may have asked a friend who said "this is how I handled it" or who told them it would cost too much money. Parents may also be scared of working with an attorney for any number of reasons. As a coach, you can provide information on free or reduced cost community resources through legal services. You can let parents know that even with private attorneys, there are a number of situations where an attorney does not get paid unless they win the case, such as disability, so there is no upfront out-of-pocket cost.
- Listen for these problems most commonly faced by parents:
  - Family issues (divorce, custody, domestic abuse, support, guardianship)
  - Housing issues (landlord/tenant, federally subsidized housing, eviction, foreclosures)
  - Income maintenance (public benefits, unemployment compensation)
- In addition, ask these questions or listen for these legal issues:
  - Are there any issues with criminal records that are getting in the way of finding a job?
  - Is child support current (if client is required to pay child support)?

- When an individual is behind on child support, driver's licenses can be suspended, tax refunds taken, and passport applications denied.
- For individuals being released from prison, legal financial obligations pose barriers. Some individuals have thousands of dollars of legal fees/obligations.
- Although most programs prevent staff from asking about an individual's immigration status, it is important to be aware of how legal status may impact an individual's eligibility for services such as drivers' privilege cards, and insurance options.

*The following advice is from Helping Clients with Legal Issues, Accessing Justice Series: Legal Information for Frontline Service Providers, Center for Legal Public Education, Alberta, Canada, April 2016, pp. 12 and 14.*

## ONCE YOU'VE IDENTIFIED THAT YOUR CLIENT HAS A LEGAL ISSUE OR ISSUES, WHAT SHOULD YOU DO?

- Connect your client with an appropriate legal information source or legal service provider for assistance.
- Do not provide your parent with advice on how to deal with the legal issue(s) or which course of action they should take. Your role is to help them access relevant information sources and refer them to appropriate services.  
  
EXAMPLE: You may help them access a court website to find forms for a hearing. However, you cannot suggest what they should include in the form or what they should say at the hearing.
- It can be difficult to know which issues should be considered high-priority. Use

the following list as a guide to which issues should be considered urgent and high-priority:

- Client has an upcoming court date.
- Client has missed a court date.
- Client received legal or government documents that require a response or follow-up action, i.e., family court pleadings, small claims court summons, public housing letter, immigration notice, social benefits letter.
- Client has outstanding criminal charges or warrants.
- Client recently received an eviction notice.

## POWERFUL QUESTIONS AND OTHER FAMILY-CENTERED INQUIRIES:

- How do you suppose this legal issue will impact your family?
- What do you know about this legal issue now?
- What do you need to know and how can your family help you access this information?
- What do you want for your family?

### INFORMATION FROM OTHER CONTENT AREAS CAN SUPPORT SUCCESS IN THIS ONE

This topic ties closely in with other topics such as employment, education, and career; basic needs; family, friends, relationships; and child well-being and parenting. Looking at these areas provides insights into other interests, strengths, and potential challenges that can support or hinder a parent’s ability to make progress toward a legal goal.

OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
EMPLOYMENT, EDUCATION, AND CAREER	What types of jobs are you interested in, or what job do you currently have?
	Are there any barriers to applying for jobs or advancing in a job based on legal issues, such as criminal records, bankruptcy, disability, accommodations?
BASIC NEEDS	Do you have a clean and healthy place to live?
	Are you about to lose your home?
	What type of housing do you have?
	What public benefits do you receive? Have you ever been denied benefits?
	Have you received an eviction or foreclosure?
	What would your financial picture look like without benefits, such as SNAP, TANF?
	What would you like the picture to look like?

OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
FAMILY, FRIENDS, RELATIONSHIPS	Who is in your family?
	If parents are not living together, who has legal custody of any children?
	Are there other children living in your household? If so, who has legal custody of them?
	Are there any concerns you have about you or your family's well-being or safety? Listen for problems with domestic violence, child support, or alimony.
	Are you part of a particular group or issue that may have special benefits or rights under the law, such as veterans, disabled, homeless, domestic violence?
CHILD WELL-BEING AND PARENTING	How are your children doing in school? Do you have a child with a mental or physical health concern who is having challenges learning at school or is being suspended or expelled?
	How are your children's health? Are there health concerns or problems accessing health care?
	Do you have problems with the condition of your housing that is impacting you or your child's health?
	What are the social and emotional aspects of your children's lives? Are they generally happy, content, sad, angry, or clingy?

*The resources identified below are recommended by the Advisory Committee and Topic Experts for the Family-Centered Coaching Toolkit.*

## FOR YOUR TOOLKIT: IDENTIFY RESOURCES IN YOUR COMMUNITY

- ✓ Legal Aid and other legal services providers
- ✓ Low-cost or sliding scale legal services
- ✓ Legal clinics; sometimes legal aid agencies or local bar associations have a one-day-a-month clinic.
- ✓ Any programs offered by the county or state bar association
  - Matching with an attorney for a low-cost consultation
  - Providing free legal services to certain types of clients – for example, veterans
  - Call-in days
- ✓ Most states have a self-help legal website in conjunction with the courts. The state site will give legal information on different topics. Here are a few examples from states:
  - <http://www.courts.ca.gov/selfhelp.htm>
  - <http://oklaw.org/>

Legal aid refers to the provision of free legal services for clients who cannot afford to pay for counsel (a lawyer). Legal services agencies are throughout the country and provide free legal services ranging from advice to full representation to low-income clients on civil matters, generally not criminal matters.

If a legal service agency cannot help a client, they can make referrals to other organizations or the private bar. Most legal services attorneys have an understanding of what types of legal cases an organization addresses and are familiar with free and low-cost providers. For example, in some states, the local bar associations will provide a legal consultation for a small fee. For some legal cases, a parent can receive a free consultation with an attorney to understand their rights. With other legal cases, an attorney will represent individuals with no up-front costs and only be paid if the case is won.

### TOOLS/RESOURCES:

#### National Database To Find Legal Help By State:

<http://www.lawhelp.org/find-help/>

#### Types of Free Legal Services

<http://hirealawyer.findlaw.com/do-you-need-a-lawyer/types-of-free-legal-services.html>



**What Should I Look for When Trying to Choose a Lawyer?**

<http://tinyurl.com/nvb2ldh>

**Helping Clients with Legal Issues, Accessing Justice Series: Legal Information for Frontline Service Providers, Center for Legal Public Education, Alberta, Canada, April 2016**

<http://www.cplea.ca/wp-content/uploads/2016/05/HelpingClientsWithLegalIssues.pdf>

**Accessing Justice in the Contemporary USA: Findings from the Community Needs and Services Study, Rebecca Sandefur, American Bar Association, University of Illinois at Urbana-Champaign, 2014**

<http://tinyurl.com/kph6msk>

**For Immigrants From Spanish-Speaking Countries:**

*Immigrants from Spanish-speaking countries are vulnerable to notary fraud because in most countries a notario can practice law. Sometimes individuals who are notaries in the United States will falsely present themselves as attorneys and charge people for legal services.*

<http://tinyurl.com/ycogobgo>

**National Immigration Law Center**

*Know Your Rights*

<https://www.nilc.org/get-involved/community-education-resources/know-your-rights/>

**American Civil Liberties Union**

*Know Your Rights: What to Do if You're Stopped by Policy, Immigration Agents or the FBI*

<https://www.aclu.org/know-your-rights/what-do-if-youre-stopped-police-immigration-agents-or-fbi>

**National Council of La Raza**

*Has many publications on immigration issues, including "Know Your Rights: Financial Safety"*

<http://publications.nclr.org/>

**US Department of Justice: National Institute of Corrections**

<https://nicic.gov/>

**Vera Institute of Justice**

*Strengthening Families and Communities*

<https://www.vera.org/strengthening-families-communities>

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## CONTENT MODULE: FINANCIAL

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### WHY IS THIS TOPIC IMPORTANT FOR BOTH A COACH AND A FAMILY?

During the past 10 years, financial coaching has emerged as a powerful means for helping families move toward economic stability and sufficiency. Initial research shows that supporting families to achieve their financial goals is a promising strategy for helping them achieve other goals. Once families feel more stable financially, they are able to begin saving, and savings is linked to many other outcomes. Talking about finances with families is

often a means to learn about what is happening in their overall life and what they are trying to achieve. A parent may come into your program wanting to talk about a debt issue, but as the conversation unfolds, you learn that there are child care needs and an unexpected medical crisis that contributed to the credit issues. As you work with the parent to understand the pieces of their financial life, it will lead back to many other areas on the Wheel of Life.

#### GENERAL TIPS AND ADVICE FOR COACHING ON THIS TOPIC:

- Discussing money with parents can be sensitive and challenging. Make the approach to the conversation non-judgmental, assuring the parent that the discussion is confidential and that how quickly they proceed depends on how fast they want to go. The parent sets the agenda and pace while the coach provides the options.
- Typical financial topics for discussion include savings; household expenses, such as the cost of child care; increasing income; credit and debt; taxes; and access to financial products and services.
- Start the conversation by asking the parent basic and non-specific questions about how they are doing overall. It's OK if the response is not related to a financial concern. If you start by asking about their budget or credit, they can feel overwhelmed, or possibly embarrassed. "Listen to learn" by providing space and waiting for them to tell you what is most important. Parents, like us, come in with what they perceive as their failures, and it is not the coaches' roles to give an opinion, but to support them through listening and knowing that they will develop their own solutions.
- For many programs, financial coaching and child care needs are closely tied. Many early care and education programs have upfront conversations with parents about their finances as a means to help parents recognize that they could benefit from financial coaching. Then with strong referral mechanisms in place, parents can receive the assistance with finances that they need.
- Do they have a budget? Do they feel like they have extra money at the end of every month? If

not, what do they do? Are they able to put money into savings? Make a visual and a budget to help them have an “aha” moment. It may help to draw on paper a simple two-column grid with the headings, “Income” and “Expenses.” Work with the parent to fill out key monthly expense items. Having this simple visual aid may be an eye-opener for a parent who doesn’t use a budget.

- Coaches can support parents by bringing up the topic of saving for their child’s education. Parents are often highly motivated to plan for their child’s future. Helping them see how college savings can be approached in bite-size pieces can make a savings plan more possible and manageable. Research shows that any type of savings creates more likelihood of going to college and staying in college.
- Financial problem solving is an important conversation. What happens when an unexpected thing happens to a family? You can help a family plan in advance if something happens. Having backup scenarios helps them be prepared and able to make better decisions when something unexpected happens.
- Never endorse products or services. Coaches must not recommend or suggest that participants use a specific financial product, service, or investment option regardless of perceived quality or lack of a conflict of interest. The client must trust that the coach is establishing a relationship that puts the responsibility of researching products on the participant.

## POWERFUL QUESTIONS AND OTHER FAMILY-CENTERED INQUIRIES:

- What are your financial goals for your family?
- Where would you like to be with your finances in three months? One year? Five years?
- Have you ever thought about setting a financial goal for your family?
- What are your dreams for your children? Many families are more relaxed and open to a conversation about savings if you ask about their dreams for their children, rather than for themselves. This can open the door to other conversations about their individual dreams at a later time.

## INFORMATION FROM OTHER CONTENT AREAS CAN SUPPORT SUCCESS IN THIS ONE





This topic ties closely in with other topics such as employment, education, and career; basic needs; legal; and child well-being and parenting. Looking at these areas provides insights into other interests, strengths, and potential challenges that can support or hinder a parent’s ability to make progress toward a financial goal.

OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
EMPLOYMENT, EDUCATION, AND CAREER	What types of jobs are you interested in, or what job do you currently have?
	Do the jobs you are looking at or currently hold have benefits? What are they? How can you research this?
	What is the average salary/wage?
	What are the opportunities for advancement?
	Is there a need for more education/training?
	What are the costs?
	How will you pay for it?
BASIC NEEDS	What would your financial picture look like without benefits? (SNAP, TANF)
	How can you plan for changes in benefits as your income increases?
	What would you like the picture to look like?

OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
LEGAL	Are there any issues with criminal records or the legal system that are getting in the way of finding a job?
	Is child support current? When child support has not been paid, driver's licenses can be suspended and tax refunds taken. If a family has relatives in other countries and they need to get a passport but have a past due child support, then they can't get a passport without paying off the child support debt. A growing number of immigrant families are dealing with this.
	For men and women being released, legal financial obligations pose barriers. Some men and women have thousands of dollars in legal fees/obligations.
	Do you qualify for a driver's license or driver's privilege card? These are questions to begin a conversation about a parent's legal status. Knowing this can help to understand what kinds of financial services are available, such as insurance options.
CHILD WELL-BEING AND PARENTING	What child care needs do you have?
	What is the cost of child care?
	How is it paid for?
	What are the types of childcare options?
	Are there subsidies available?
	What is your backup plan?
	Are there ways to enlist the support of your family?

*The resources identified below are recommended by the Advisory Committee and Topic Experts for the Family-Centered Coaching Toolkit.*

## FOR YOUR TOOLKIT: IDENTIFY RESOURCES IN YOUR COMMUNITY

-  Credit counseling
-  Financial literacy programs
-  Financial coaching
-  Low-income taxpayer clinics and credit unions

### TOOLS/RESOURCES:

#### **Budgeting Software**

*You Need a Budget combines software with four simple rules to help you quickly gain control of your money, get out of debt, and save more money faster!*

<https://www.youneedabudget.com/>

#### **Consumer Protection**

*The Federal Trade Commission provides free resources for people to learn about credit, debt, identity theft, and avoiding scams, as well as budgeting, opening a bank account, shopping for prepaid cards, and managing money in general.*

<https://www.consumer.gov/>

#### **Credit Counseling/Debt Management**

*National Foundation for Consumer Credit Counseling (NFCC) member agencies provide credit counseling, debt management, financial reviews, and comprehensive money management services based on the consumer's individual needs.*

<https://www.nfcc.org/>

#### **Credit Reports**

*Obtain one free credit report form each of the national credit reporting companies.*

<https://www.annualcreditreport.com/index.action>

#### **Credit Unions**

*National Federation of Community Development Credit Unions*

<http://www.cdca.coop/about-us/>



**Financial Assessment**

*The Mint Grad Financial Fitness Test*

<http://www.themintgrad.org/try-it/financial-fitness-test/>

**Financial Coaching Platform**

*The Financial Clinic's Change Machine contains all the tools and resources practitioners need to address their customers' underlying financial insecurity. The "share" portion of the platform provides a means for coaches to get answers from other coaches on financial topics. There is a fee for this service.*

<https://change-machine.org/share>

**Financial Education and Capability for Adults**

*CFPB's Your Money, Your Goals is a set of financial empowerment materials for organizations that help people meet their financial goals by increasing their knowledge, skills, and resources.*

<https://www.consumerfinance.gov/educational-resources/your-money-your-goals/toolkit/>

**Financial Education and Capability for Children**

*Parents and caregivers can access resources to help build young people's money skills.*

[consumerfinance.gov/parents](https://www.consumerfinance.gov/parents)

**Financial Software**

*Personal Capital is free financial software allows you to easily manage your entire financial life in one secure place.*

<https://www.personalcapital.com/>

**Identify Theft**

*IdentityTheft.gov can help you report and recover from identity theft.*

<https://www.identitytheft.gov/>

**Personal Finance App**

*Take control of your money with Wally. Understand where it goes. Balance income and expenses. Set and achieve financial goals.*

<http://wally.me/>

**Retirement Savings**

*myRA is a retirement savings account from the United States Department of the Treasury.*

<http://tinyurl.com/yajs4gnr>

### **Saving for College Expenses**

*Website for federal student aid*

[www.studentaid.ed.gov](http://www.studentaid.ed.gov)

*Application for student aid*

[www.fafsa.ed.gov](http://www.fafsa.ed.gov)

*Understanding education tax credits*

<https://www.irs.gov/individuals/education-credits>

*Coverdale ESAs*

[http://www.savingforcollege.com/coverdell\\_esas](http://www.savingforcollege.com/coverdell_esas)

*529 plans (both as a part of tax season, and independently)*

[http://www.savingforcollege.com/529\\_plan\\_details/index.php?page=plans\\_by\\_state](http://www.savingforcollege.com/529_plan_details/index.php?page=plans_by_state)

*CFPB website to help consumers make informed financial decisions about how to pay for college*

[www.consumerfinance.gov/paying-for-college/](http://www.consumerfinance.gov/paying-for-college/)

### **Savings Tool**

*EARN Starter is a free, simple, online hat helps you save for what's most important!*

<https://www.earn.org/>

### **Tax Assistance**

*The VITA program (Volunteer Income Tax Assistance) offers free tax help to low- to moderate-income people who cannot prepare their own tax returns.*

<https://www.irs.gov/individuals/free-tax-return-preparation-for-you-by-volunteers>

### **Estimating Earned Income Tax Credit Amounts**

<http://www.eitcoutreach.org/help>

## CONTENT MODULE: **HEALTH AND WELL-BEING**

### WHY IS THIS TOPIC IMPORTANT FOR BOTH A COACH AND A FAMILY?

This module includes both physical and mental health; important considerations for all family members. Studies show that poverty and poor health are inextricably linked. According to Health Poverty Action:

- poverty increases your chances of getting ill because of poor nutrition, overcrowding, and stress.
- living in poverty and/or experiencing the impact of institutional racism on a daily basis can create high stress or cumulative trauma for families.
- poor health can increase poverty by reducing a family's ability to work and causing families to sell assets to cover the cost of treatments.
- for parents, their health status, both physical

and mental, can impact children in the family<sup>9</sup>

Not surprisingly, some of the main social determinants of health include topics regularly discussed in coaching sessions: where you live, income, access to good food, nutrition, education, relationships with family and friends, gender, culture, social status and social exclusion, access to and use of health services, and personal behaviors. It's important to note that some of these social determinants are out of people's control, such as gender, where you live, and education.

<sup>9</sup> When any one family member experiences poor health and limited medical access, the effects on young children can include an increased use of emergency care, missed well-child visits at the pediatrician's office, and greater incidences of health conditions, such as asthma. Parents with high levels of stress and depression can have more limited capacity to participate in positive parenting practices, such as affectionate, responsive parent-child interactions. This can have long-term effects on children's health and their ability to respond successfully to stress. "Because depression is closely linked to the stresses of poverty, housing instability, and unemployment, it tends to be more common in families with persistent financial challenges (Adler & Newman, 2002)," (NCPFCE).

#### GENERAL TIPS AND ADVICE FOR COACHING ON THIS TOPIC:

- Keep in mind that health is not just the absence of disease, but achieving optimal physical and mental well-being. For a parent, this means wellness is making choices toward a more successful self. This can include making choices that support their well-being and that of their family. Many tools and resources can help parents make positive wellness choices, such as mindfulness or nutrition tools on the internet or apps on the phone. For example, a parent may make a choice to practice wellness by listening to a three-minute meditation app in the morning or a daily gratitude app in the evening.
- However, for nutrition, be mindful that families may live in a "food desert" and not have many choices for where to buy their food.
- Make sure families have access to the health benefits for which they are eligible. Sometimes a family may not know they are eligible or may have been wrongly denied coverage. Listen for

the financial, and possible legal issues regarding the family's access to health care. Given the changing state of health care, be sure to refer to the government website listed below under resources for determining eligibility for Medicaid and health care subsidies.

- Exploring whether a family's basic needs are adequately addressed provides information as to whether a health issue may be related to food security, housing conditions, or other basic needs. For example, explore a family's food options – such as where they shop, whether they are on SNAP, or if children are enrolled in a reduced cost lunch program.
- Different racial and ethnic communities and linguistics groups each have their own cultural traits and health challenges. Be mindful and aware of these cultural differences in how physical and mental health are understood and experienced so that you can approach conversations with respect and humility.
- Family and friends can be sources of both support for and challenges to health and well-being. The tool Who Is in My Family? can provide a starting point for discussing the role family members play in a family's health and well-being.
- The Mind Your Head website reminds us that “Everybody has mental health just the same as everybody has physical health.” Here are things it suggests to keep in mind regarding mental health:

*“Mental health is about the way you think and feel about yourself, others and the world around you. It's about your ability to enjoy life, to reach your goals and to pick yourself up when life gets difficult. It's about how you manage your relationships and make the most of your potential.” You can refer to the Patient Health Questionnaire-2 (PHQ-2) in the toolkit on page 17 for two simple questions to ask clients to get a sense of their mental well-being. It is important to note that some states have mandatory reporting laws, especially around issues of attempted suicide or child abuse or neglect. Research your state reporting laws prior to working with participants. If those issues arise while coaching a participant, follow your state's guidelines.*

*“In the same way that our physical health can be affected, there are times that things can get on top of us and affect our mental health. We may have difficulty concentrating or we may feel alone; sometimes people get mental illnesses, like depression or anxiety or an eating disorder. There are things we can do to help our mental health and well-being, and some of these things can and will help your physical health too. People can and do recover from a mental illness or learn how to manage their symptoms so they don't have as big an impact on their life.”*

## POWERFUL QUESTIONS AND OTHER FAMILY-CENTERED INQUIRIES:

- What are your goals for your own health?
- How have you successfully dealt with a tough situation in the past?
- What can you take from that experience to help you now?
- What needs to happen so you can make good choices for your health? Your child's health?
- What do you want to be able to do for your child's health?
- Who is available to help you with your health goals? With your child's health goals?

### INFORMATION FROM OTHER CONTENT AREAS CAN SUPPORT SUCCESS IN THIS ONE

This topic ties closely in with other topics such as child well-being and parenting; basic needs; financial; and legal. Looking at these areas provides insights into other interests, strengths, and potential challenges that can support or hinder a parent's ability to make progress toward health and well-being goals.






OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
CHILD WELL-BEING AND PARENTING	What are the ages of your children?
	What do they do during the day?
	Where do they go to school?
	What child care, after school needs do they have?
	What extracurricular activities do they have?
	What are the medical needs of your children or other family members? Listen to understand if they may be related to the living conditions, such as lead paint, broken stairs, or other housing concerns, or eating habits.

OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
BASIC NEEDS	Tell me about where you live.
	Who lives with you?
	How long have you lived there?
	What are meals like in your family?
	Who does the cooking?
	Tell me about things you worry about for your kids, such as safety concerns.
FINANCIAL	How does your family support itself?
	Is anyone else in the family working?
	What other income is coming into the family?
	You can explore health benefit options with the parent.
LEGAL	Legal issues are a source of stress for families. Listen for these problems most commonly faced by parents:
	Family issues (divorce, custody, domestic abuse)
	Housing issues (landlord/tenant, federally subsidized housing, eviction, foreclosures)
	Income maintenance (public benefits, unemployment, compensation)
FAMILY, FRIENDS, RELATIONSHIPS	What relationships help you to feel connected and healthy?



*The resources identified below are recommended by the Advisory Committee and Topic Experts for the Family-Centered Coaching Toolkit.*

## FOR YOUR TOOLKIT: IDENTIFY RESOURCES IN YOUR COMMUNITY

-  Clergy and faith-based organizations
-  Community and cultural centers
-  Health clinics
-  Mental health clinics
-  YMCA/YWCA

### TOOLS/RESOURCES:

#### **Determining Eligibility for Medicaid**

<https://www.hhs.gov/answers/medicare-and-medicaid/who-is-eligible-for-medicaid/index.html>

#### **Coaching vs. Therapy: What are the Differences and When Do You Refer?**

<http://www.coactive.com/learning-hub/fundamentals/res/topics/FUN-Coaching-vs-Therapy.pdf>

#### **Mind Your Head**

<http://www.mindyourhead.org.uk/info>

#### **Office on Women's Health, U.S. Department of Health and Human Services**

*Available in Spanish and English*

<https://www.womenshealth.gov/>

#### **The Mom's Stress Management Course Participant Manual (The New Haven MOMS Partnership)**

*For a copy contact Megan Smith at [megan.smith@yale.edu](mailto:megan.smith@yale.edu)*

#### **6 Mindfulness Exercises You Can Try Today**

<http://www.pocketmindfulness.com/6-mindfulness-exercises-you-can-try-today/>

#### **CAGE Assessment for Alcohol Abuse**

<http://www.tobaccofreemaine.org/channels/providers/documents/CAGE.pdf>

### **13 Mental Health Benefits of Exercise**

[http://www.huffingtonpost.com/2013/03/27/mental-health-benefits-exercise\\_n\\_2956099.html](http://www.huffingtonpost.com/2013/03/27/mental-health-benefits-exercise_n_2956099.html)

### **The Simple, No-Equipment Workout You Can Do At Home**

<http://www.oprah.com/health/the-no-equipment-workout-you-can-do-at-home>

### **Simple Exercises to Do at Home**

<https://www.youtube.com/watch?v=eN5rwMAqelU>

### **Healthy Eating: Simple Ways to Plan, Enjoy, and Stick to a Healthy Diet**

<https://www.helpguide.org/articles/healthy-eating/healthy-eating.htm>

### **12 for 2012: Twelve Tips for Healthier Eating**

<http://www.health.harvard.edu/healthy-eating/12-for-2012-twelve-tips-for-healthier-eating>

### **Aces Too High**

*This is a website about the prevalence and consequences of Adverse Childhood Experiences (ACEs) and what to do prevent them.*

<https://acestoohigh.com/aces-101/>

### **Nurture Them, Nurture Yourself – Tip Sheets for Parents**

<https://eclkc.ohs.acf.hhs.gov/sites/default/files/pdf/nurture-them-nurture-yourself.pdf>

### **Talking about Depression with Families**

<https://eclkc.ohs.acf.hhs.gov/sites/default/files/pdf/talking-about-depression-with-families.pdf>

### **Health Tips for Families Series**

<https://eclkc.ohs.acf.hhs.gov/physical-health/publication/health-tips-families-series>

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## CONTENT MODULE: FAMILY, FRIENDS, RELATIONSHIPS

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### WHY IS THIS TOPIC IMPORTANT FOR BOTH A COACH AND A FAMILY?

Social capital, in the form of family, friends, and relationships, can be a strong source of support for a parent seeking to make changes. The influence of family and friends can have a strong impact on a parent's and family's actions and plans, both positively and negatively. Having a strong and reliable support system – whether to help with child care, lend a ride, or be a shoulder to lean on – is key to a parent's ability to make progress toward goals for family well-being. A cheering squad in their corner can help a parent remain focused even when obstacles arise, as they

naturally will. On the other hand, if a family member or friend casts doubt on a parent's ability or expresses disapproval of change, it can derail the parent's hard work. Sometimes, family members or others mean to be helpful, but dispense inaccurate information, leading a parent to make poor decisions for themselves.

Understanding who is within a parent's circle of support will help you better identify the influences at play in a parent's life and be better able to discuss the impact of those influences on a parent.

#### GENERAL TIPS AND ADVICE FOR COACHING ON THIS TOPIC:

- Two family-centered coaching tools that can be helpful in identifying and understanding a parent's social capital are Who Is in My Family? and The Wheel of Life. Discussing responses based on Who Is in My Family? not only provides a means to know the people closest to the parent, but also sheds insight on the influence each plays in the parent's life. When completing The Wheel of Life, a coach can explore why a parent rated domains differently and who from their family is impacted by the domain. This conversation allows the coach and the parent to better understand the complexity of relationships and influences.
- When talking with a parent, you may see or hear signs of an abusive relationship. If the parent identifies the need to leave an unhealthy relationship, you need to refer them to a source that can help them develop an exit plan. If you see signs of abuse but the parent does not, then you can share the signs of a healthy relationship and ask how that compares to what the parent identifies as healthy. (See Future without Violence under Resources below. It provides support to programs to talk with parents and has extensive free resources and an 800 number for help, support, and connections to local resources.) If the parent identifies qualities as not healthy, then you can ask scaling questions. If the scale is 1 to 10, ask "How can I support you to move from a 4 to a 5?" Only suggest moving one step at a time. Talk with the parent about what a move to 5 would look like or sound like.

For more information on how and when to make referrals for domestic abuse, see the guidance of the National Association of Social Workers noted in the Resources section below.

Remember, if no local resources are available, you can refer a parent to an advocate from the multi-lingual National Domestic Violence Hotline 24 hours a day by dialing 800-799-SAFE, TTY 800-787-3224.

- Many social services are constructed to serve mothers and children, but not fathers or other significant men in families' lives. If you are serving single mothers, some may not have a relationship with the father of their children but they may have a relationship with another man. Think about whether your questions and program materials create space for the mother to discuss these relationships, which are often a hidden, critical piece of the family puzzle. Also, if your agency doesn't serve men, be familiar with other groups in your community that might. Be an advocate for expanding your own program offerings to all family members.
- For many families, religion and spirituality are fundamental to who they are. Seek to understand the relationships that support this and how a parent draws on that support. Ask if a parent belongs to and/or is active in a faith community. How has the community provided support to the parent? This can be emotional support as well as practical support in the form of vacation camps and providing food or child care during crises. Do other members of the family participate in this community or another one?
- For men in re-entry from the criminal justice system, they may be returning to existing relationships where families have certain financial expectations based on past income he provided. Ask the parent, is the family prepared for this change and the reduced income? How can he adjust to coming home and not earning what he was before? In some cases, referral to family counseling may be helpful.
- It is important to understand the complexity of a family's life. Families may be blended or combined in unique ways. There are many constellations of families including foster families, adoptive families, LGBTQ-headed families, multi-generational families, and chosen families. Sometimes this information is gathered through intake, either in person or by completing paperwork, and the coach can use the information to better understand family dynamics and the communication channels. The more people who are involved, the more time and effort it can take to coordinate and follow through on activities. In your program, you may want to discuss how this information can be gathered in a participants-centered manner.
- Conversations about reproductive health are often best approached through a relationship lens. Reproductive health includes both partners. For parents in heterosexual relationships, programs often approach topics such as contraception as a woman's responsibility. It is important to engage male partners in this conversation to alleviate the burden this can pose on women. Other topics for a shared conversation between partners, regardless of sexual orientation, include pregnancy, childbirth, breastfeeding, and other issues.

## POWERFUL QUESTIONS AND OTHER FAMILY-CENTERED INQUIRIES:

- Who is your biggest cheerleader?
- How does your religion or faith community provide support to you and your family?
- What network of friends/family do you rely on and can count on when you're in a bind?
- What story about your family/friends/relationship do you most often hear yourself telling?
- What story is holding you back? Story can be changed to reflect each relationship.
- What am I not asking you that may be helpful for us to discuss?
- What is the opportunity here? What is the challenge?
- How does this fit with your plans/way of life/values?
- If there is indication of an abusive relationship, ask "If you went to sleep tonight and this relationship was resolved, how will you know that? How would you be feeling?"
- What do you want to do with this (hard) conversation?
- What is your biggest fear around \_\_\_\_\_?
- Asking about someone's safety, particularly around domestic violence and substance abuse, can be approached through the use of motivational Interviewing. Motivational interviewing questions around Asking Permission and Normalizing are useful. Some examples are below:
  - Do you mind if we talk about (insert behavior)?
  - Can we talk a bit about your (insert behavior)?
  - A lot of people are concerned about changing their (insert risky/problem behavior).
  - Many people report feeling like you do. They want to change their (insert risky/problem behavior), but find it difficult.

## INFORMATION FROM OTHER CONTENT AREAS CAN SUPPORT SUCCESS IN THIS ONE

This topic ties closely in with other topics such as child well-being and parenting; basic needs; financial; and legal. Looking at these areas provides insights into other interests, strengths, and potential challenges that can support or hinder a parent’s ability to make progress toward family, friends, and relationship goals.





OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
CHILD WELL-BEING AND PARENTING	What are the ages of your children? <ul style="list-style-type: none"> <li>- What do they do during the day?</li> <li>- What child care, after school needs do they have?</li> <li>- What extracurricular activities do they have?</li> </ul>
	Who can provide support for taking care of the children?
	What are the medical needs of your children or other family members?
	For example, if a child has asthma, a parent may have to attend many doctor appointments, or administer meds.
	How can family and friends help you meet the needs of your children/family?
BASIC NEEDS	Tell me about meals in your family.
	How long is the commute to school/training/job?
	Is there public transportation or a car to use?
	Tell me about your living situation.
	What are meals like in your family?
	How can you enlist the support of family and friends re: transportation, housing, food?
FINANCIAL	What do you need to earn to support your family? You should come ready to address this as the family may not know.
	Is anyone else in the family working?
	What other income is coming into the family?
	You can explore benefit options with the parent.



OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
HEALTH AND WELL-BEING	What are your goals for your own health?
	What has happened in the past when you have set out to do that?
	Are there things you worry about that might get in the way of making good choices related to your health? Your child's health?
	What do you want to be able to do for your child's health?
	Who is available to help you with your health goals? With your child's health goals?

*The resources identified below are recommended by the Advisory Committee and Topic Experts for the Family-Centered Coaching Toolkit.*

## FOR YOUR TOOLKIT: IDENTIFY RESOURCES IN YOUR COMMUNITY

-  Walk-in counseling centers
-  Crisis lines for parents
-  Community and cultural centers
-  Faith-based organizations

### TOOLS/RESOURCES:

#### Social Capital is an Accelerator for Family Stability and Strength

<http://ascend.aspeninstitute.org/pages/social-capital-is-an-accelerator-for-family-stability-and-strength>

#### Home Grown Social Capital

<http://tinyurl.com/y9k6otqd>

#### How to Create Healthy Boundaries

[https://www.uky.edu/hr/sites/www.uky.edu.hr/files/wellness/images/Conf14\\_Boundaries.pdf](https://www.uky.edu/hr/sites/www.uky.edu.hr/files/wellness/images/Conf14_Boundaries.pdf)

#### The National Campaign to Prevent Teen and Unplanned Pregnancy

<https://thenationalcampaign.org/>

**National Association of Social Workers – Domestic Violence Assessment and Intervention**

[http://www.socialworkers.org/pressroom/events/domestic\\_violence/assessment.asp](http://www.socialworkers.org/pressroom/events/domestic_violence/assessment.asp)

**National Resource Center on Domestic Violence**

<http://www.nrcdv.org/>

**Institute on Domestic Violence in the African-American Community, University of Minnesota**

<http://www.idvaac.org/>

**National Domestic Violence Hotline**

1-800-799-7233 (SAFE)

TTY 1-800-787-3224

**Future without Violence**

[www.futureswithoutviolence.org](http://www.futureswithoutviolence.org)

**Love is Respect – the National Dating Abuse Helpline**

*Live chat at [www.loveisrespect.org](http://www.loveisrespect.org)*

1-866-331-9474

TTY 1-866-331-8453

Text “loveis” to 22522

**RAINN – The Rape Abuse Incest National Network**

*For rape/sexual assault services, contact:*

1-800-656-4673 (HOPE)

*Secure, online private chat:*

<https://ohl.rainn.org/online/>

**The Responding to Intimate Violence in Relationship programs (RIViR) project**

*Funded by the Office of Planning, Research, and Evaluation (OPRE) in the Administration for Children and Families, aims to understand how to best identify and address intimate partner violence (IPV) in the context of healthy relationship programming. The project has released research-based and expert-informed briefs on this topic.*

<http://tinyurl.com/y9zqplyr>

**Social Capital And Community Support - United Way**

*United Way supports 2-1-1, a free and confidential service that helps people across North America find the local resources they need 24 hours a day, 7 days a week.*

<https://www.unitedway.org/our-impact/featured-programs/2-1-1>

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## CONTENT MODULE: **BASIC NEEDS: FOOD, HOUSING, TRANSPORTATION, SAFETY**

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### WHY IS THIS TOPIC IMPORTANT FOR BOTH A COACH AND A FAMILY?

Having basic needs met provides the foundation for parents to focus on and take steps to meet other family goals such as employment or child well-being. The lack of basic needs, such as enough food or safe housing, often present as priority issues to be addressed first and may represent a crisis situation.

Not only are basic needs essential, but a scarcity or lack of security in these areas also thwarts families' ability to achieve other goals. Recent brain research shows that scarcity, whether it be of time, food, money, or something else, impairs mental capacity, making it challenging for people to make decisions that support their long-term well-being.

Basic needs are among the social determinants of health, which is important given that whole family health and well-being are key goals for most families.

Social determinants of health include economic stability neighborhood and physical environment, which includes transportation; housing, and safety; education; food; community integration; and health care system. (Beyond Health Care: The Role of Social Determinants in Promoting Health and Health Equity, <http://tinyurl.com/qbpxg83>)

#### GENERAL TIPS AND ADVICE FOR COACHING ON THIS TOPIC:

- While basic needs can be viewed in two distinct ways: 1) a lack of tangible resources, e.g., food and shelter; and 2) being at risk of harm, e.g., safety issues such as fire safety, poor housing, lead hazards, and overcrowding, they are also intertwined. (Safety issues related to relationship violence, and child abuse/neglect are addressed in the content module Family, Friends, Relationships.) Other ways to normalize concerns around other types of safety include saying, “Lots of parents think about ways to protect their children and buffer them from the stresses going on in the family and the community. What are some of the ways you protect your children from the stresses in your family?” This may lead to conversations about lack of food security or a landlord who does not fix things in the building.
- Initially, addressing basic needs may require a case management approach. Once basic needs are addressed, it can lead to goal-setting for some of the issues. For example, helping a homeless family find a shelter may be an immediate need, but once secured, can then lead to a conversation about how to find permanent housing. Be transparent with a parent when switching between case management and goal-setting.

## POWERFUL QUESTIONS AND OTHER FAMILY-CENTERED INQUIRIES:

While some of these questions may be answered through intake, the coach can ask the questions with an approach of “let me get to know you.”

- What is your vision of the home and family life you want to have for you? For your children?
- How can you create some of those qualities in your current home environment?
- What are a few things you like about your current living situation?
- If you could change one thing about your basic living situation, such as food, home, or transportation, what would it be?
- How would you rate your transportation situation on a scale of 1-10?
- What would it take to make it 1 or 2 points higher?
- Tell me about where you live.
- Who lives with you?
- How long have you lived there?
- Is the housing safe and adequate to meet your needs?
- What are meals like in your family?
- Who does the cooking?
- Do you ever run out of food for you and your children? This presents an opportunity to ask about a family’s SNAP usage and/or free and reduced price lunches for children.
- From where do you get your food each month?
- Tell me about things you worry about for your kids, such as safety concerns.
- What types of transportation do you use the most? For what types of activities? What works well for you, and what is challenging in using transportation?
- How long is the commute to school/training/job?
- Is there public transportation or a car to use?
- Is it reliable? Does it meet the hours needed?
- What are your backup plans?
- What are your goals for \_\_\_\_\_? What has happened in the past when you have set out to do that?

## INFORMATION FROM OTHER CONTENT AREAS CAN SUPPORT SUCCESS IN THIS ONE

This topic ties closely with other topics such as child well-being and parenting; employment, education, and career; financial; and legal. Looking at these areas provides insights into other interests, strengths, and potential challenges that can support or hinder a parent's ability to make progress toward goals addressing basic needs.

OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
CHILD WELL-BEING AND PARENTING	<p>What are the ages of your children?</p> <ul style="list-style-type: none"> <li>- What do they do during the day?</li> <li>- Where do they go to school?</li> <li>- What child care, after school needs do they have?</li> <li>- What extracurricular activities do they have?</li> <li>- What transportation is needed to meet their needs?</li> </ul>
	<p>What are the medical needs of your children or other family members? Listen to understand if they may be related to the living conditions, such as lead paint, broken stairs or other housing concerns, or eating habits. Listen also to whether physical, as well as mental health, needs are being considered.</p>
EMPLOYMENT, EDUCATION, AND CAREER	How long is the commute to school/training/job?
	Is there public transportation or a car to use?
	Is it reliable? Does it meet the hours needed?
	If others are working, what are their hours and transportation? This information helps budget for time and other costs.
	What are your backup plans?
	Have you thought about carpooling with family or neighbors? How will this impact child care arrangements?
	How else can you enlist the support of family and friends?

OTHER CONTENT AREAS	QUESTIONS FOR THE COACH AND PARENT TO DISCUSS
FINANCIAL	How does your family support itself?
	Is anyone else in the family working?
	What other income is coming into the family?
	You can explore benefit options with the parent.
LEGAL	<p>Listen for these problems most commonly faced by parents:</p> <ul style="list-style-type: none"> <li>- Family issues (divorce, custody, domestic abuse)</li> <li>- Housing issues (landlord/tenant, federally subsidized housing, eviction, foreclosures)</li> <li>- Income maintenance (public benefits, unemployment, compensation)</li> </ul>

*The resources identified below are recommended by the Advisory Committee and Topic Experts for the Family-Centered Coaching Toolkit.*

## FOR YOUR TOOLKIT: IDENTIFY RESOURCES IN YOUR COMMUNITY

For an example of how to develop a basic needs resources site, see LIFT - DC website:

<https://sites.google.com/site/liftdcresources/home/basic-needs>

### TOOLS/RESOURCES:

#### Hunger Vital Signs

<http://childrenshealthwatch.org/public-policy/hunger-vital-sign/>

#### Feeding America

[http://www.feedingamerica.org/find-your-local-foodbank/?\\_ga=1.244916421.1305972463.1475700648](http://www.feedingamerica.org/find-your-local-foodbank/?_ga=1.244916421.1305972463.1475700648)

#### Food Security Screening

<https://eclkc.ohs.acf.hhs.gov/hslc/tta-system/family/docs/food-security-screening.pdf>



**Food Research and Action Center (FRAC)**

<http://frac.org/about/1303-2>

**National Aging and Disability Transportation Center**

[http://www.nadtc.org/wp-content/uploads/NADTC\\_InfoBrief\\_DesignFinal.pdf](http://www.nadtc.org/wp-content/uploads/NADTC_InfoBrief_DesignFinal.pdf)

**American Public Transportation Association**

*Check their webpage directory to find the local public transit agency near you.*

[www.apta.com/resources/links/unitedstates/Pages/default.aspx](http://www.apta.com/resources/links/unitedstates/Pages/default.aspx)

**2-1-1 Information**

*Your state's 211 information line can provide you with information on a variety of services, including local transportation options. Dial 2-1-1 or visit the website below for a listing of 211 websites by state.*

<https://www.disability.gov/2-1-1-help-in-your-area>

**US Department of Housing and Urban Development – Affordable Housing Resources**

[https://portal.hud.gov/hudportal/HUD?src=/program\\_offices/comm\\_planning/affordablehousing/](https://portal.hud.gov/hudportal/HUD?src=/program_offices/comm_planning/affordablehousing/)

**National Housing Resource Center**

<http://www.hsgcenter.org/counselor-resources/>

**NeighborWorks America**

<http://www.neighborworks.org/network/>

**Affordable Housing Resources, Inc.**

<http://www.ahrhousing.org/>

**Green and Health Homes Initiative**

<http://www.greenandhealthyhomes.org/>

**Partnership for Working Families – Policy and Tools: Other Affordable Housing Resources**

<http://www.forworkingfamilies.org/page/policy-tools-other-affordable-housing-resources>

**National Center for Victims of Crime**

<https://victimsofcrime.org/>

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