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The Role of Goal Setting in Integrated Service Delivery

The Working Families Success Network is committed to helping families become financially stable through ISD

Integrated service delivery (ISD) is designed to help individuals facing challenges to economic stability gain access to the services they need to achieve self-sufficiency. The Working Families Success Network (WFSN) supports ISD across three pillars: (1) employment and career advancement, (2) financial and asset-building services, and (3) income enhancements and work supports. In the WFSN, organizations are expected to meet each participant's needs through services across the three pillars, and have flexibility in how they deliver those services.

Mathematica Policy Research, charged with identifying promising practices for ISD implementation, conducted a survey of 71 WFSN organizations in 2016 and visited 8 of them in 2017. Our research suggests that goal setting may encourage participants to access services in multiple pillars; according to our survey analysis, working with participants to set goals is associated with participants receiving services in two pillars. This brief presents four strategies that have shown promise—both during our visits and in the research literature—for supporting goal setting and that could be used to connect participants with services designed to help them become self-sufficient. Because both ISD and goal setting and pursuit are processes that take place over time, these strategies may give practitioners ideas for how to provide ongoing support to participants as they pursue economic stability.



Figure 1. The three pillars of integrated service delivery

About the WFSN.

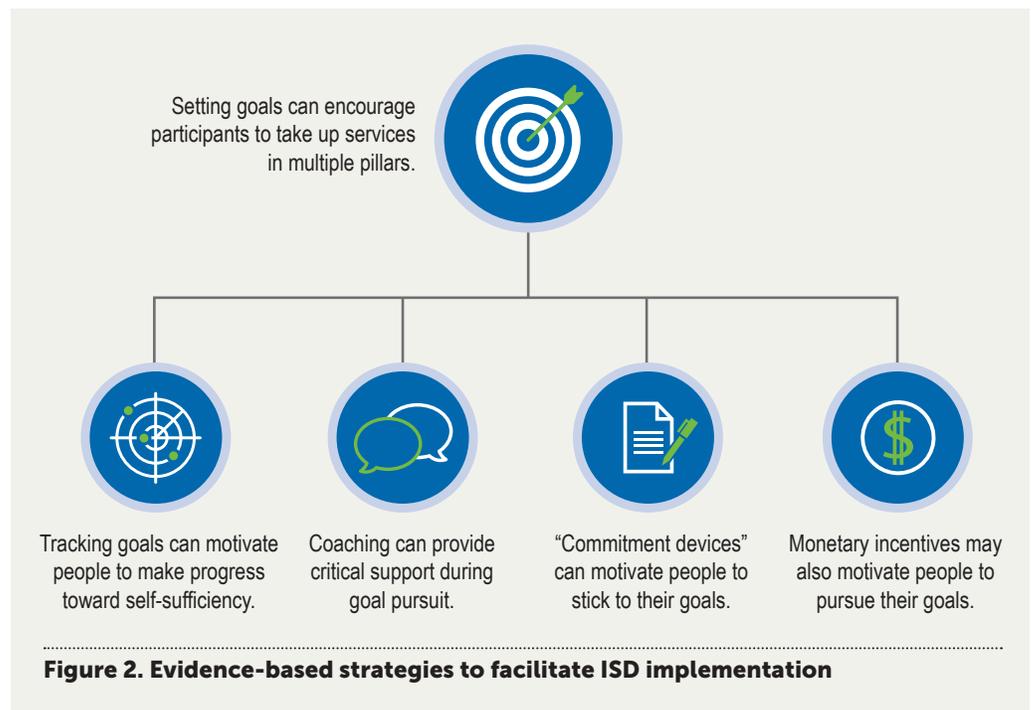
The WFSN is a collaborative of funders, national nonprofit organizations, community-based organizations, and community colleges. The network is led by a group of funders (the Annie E. Casey Foundation, Bank of America Charitable Foundation, Citi Foundation, Kresge Foundation, Lumina Foundation, MetLife Foundation, and W.K. Kellogg Foundation) as well as several intermediary nonprofits (Achieving the Dream, Local Initiatives Support Corporation, MDC Inc., and United Way Worldwide).

Setting goals in several pillars facilitated service take-up across the pillars, according to the organizations that we visited in this study. In other words, setting both financial and employment goals (such as “I will raise my credit score” and “I will look for a new job”) encouraged participants to pursue financial education *and* employment services—not just one or the other. When helping participants set and document goals, organizations should consider using research-informed best practices. For example, [research](#) shows that setting small, actionable goals—which can be achieved quickly—can boost overall motivation, compared with having one larger, long-term goal. One [explanation](#) for this phenomenon is that motivation fades over time, and [setting small, achievable goals](#) along the way to a larger goal can help people stay motivated.

We visited several WFSN organizations that exemplify this general strategy of setting and documenting goals. For example, participants in **West Philadelphia Skills Initiative** (WPSI)’s employment program in Pennsylvania are encouraged to set goals such as saving a certain amount of money and applying for a specific

number of jobs each week. On the second day of their program, participants set “SMART” goals in both the financial and employment pillars. Experts consider SMART goals—which stands for “Specific, Measurable, Attainable, Realistic, and Time-bound”—to be one of the best types of goals to set. At the **Titan Link Center** in Jamestown, North Carolina (a suburb of Greensboro), staff work with participants to map out individualized plans for achieving goals, encouraging them to set short-term goals that they can realistically achieve in the immediate future. For example, staff at the Titan Link Center, which primarily supports community college students at Guilford Technical Community College, encourage students to set goals around how they will spend and conserve their financial aid allotment over a semester or an even shorter time period.

The following section presents four strategies that can be used to support goal setting and pursuit, along with examples of specific practices implemented by WFSN organizations. We conclude with a discussion of considerations for implementing these strategies.



FOUR RESEARCH-INFORMED STRATEGIES THAT CAN HELP PARTICIPANTS SET AND PURSUE GOALS

1. Tracking goals can motivate people.

Tracking progress toward goal attainment can help motivate people to continue to pursue their goals. [Research](#) shows that to effectively pursue goals, people need to be able to assess whether they are progressing as quickly as they would like and in the right direction. WFSN organizations help participants track their goals by using software that allows staff to document what each goal is, and progress made toward goals, in each of the three pillars. For example, a participant may set a goal of saving a certain amount of money for emergencies; staff may document that amount of money as the ultimate goal, and then track how much money the participant saves each week along the way to meeting that goal. Practices that exemplify this strategy include the following:

- At the **Chinese Community Center (CCC)** in Houston, Texas, participants fill out a “goal sheet” in collaboration with their employment and financial coaches. The goal sheets are organized by short and long-term goals in each pillar, and each goal includes a target date, a date of actual attainment, and notes to track progress. Coaches revisit these goal sheets when they meet with participants to encourage them to continually make progress toward and achieve their goals.
- At **On the Move**, a rural-based organization in Napa, California, goals are documented and revisited quarterly, and then adjusted as participants achieve those goals and set new ones. According to staff, this practice is especially important for the youth that On the Move serves because their needs are constantly evolving and their goals are apt to change quickly.

2. Coaching can provide critical support during the pursuit of goals.

All of the WFSN organizations visited offer coaching to their participants. Coaching is intended to help people pursue and meet their goals and eventually act on their own without external support. Coaches also provide [feedback](#) to help people assess their own behavior, a

technique that is effective in helping people set and pursue goals. Coaching practices that exemplify this strategy include the following:

- At **Goodwill Industries of Central Michigan’s Heartland** in Battle Creek (a small city in western Michigan), coaching helps participants link their employment goals to specific career requirements. In Goodwill’s Good STEPS (Supporting Transitions to Employment for Parents) program, which serves single parents of young children, participants are encouraged to enter occupations that will provide living wages, such as early childhood education and health care. Staff help participants set goals that align with specific careers: for example, if a participant wants to pursue a career in early childhood education, which requires an associate’s degree, staff will help that participant set a goal of acquiring that degree as well as interim goals to achieve it, such as arranging for child care during night classes and finding sources of financial aid. In the process, participants typically set and pursue goals in each of the three pillars to achieve their ultimate goal of employment in a specific career.
- In weekly, individual meetings, **WPSI** participants meet with a certified coach to discuss the goal of attaining employment and progress toward meeting job application targets. During these meetings, the coach typically asks participants to reflect on their goals, report on their progress, and identify concrete steps they need to take; at subsequent meetings, coaches and the participants discuss progress toward completing those steps.

3. “Commitment devices” can motivate people to stick to their goals.

A “commitment device” asks participants to pledge that they will enact a certain behavior or meet a specific goal. [Commitments](#)—made either in private or in public—have been shown to increase the likelihood of enacting a certain behavior. In other words, asking someone to say they will do something makes it more likely that they will do it. WFSN practices that exemplify this strategy include the following:

- At **WPSI**, participants document their goals and commit to each other that they will meet them. On the second day of their program, the entire cohort writes down their goals on

large sheets of paper, which are posted in the classroom in an effort to help participants commit themselves to the goals they said they wanted to achieve and to hold each other accountable to their goals as well.

- At CCC, coaches and participants sign the goal-planning sheet as a demonstration of commitment to meeting those goals. The goal-planning sheet includes five goals across the three pillars, a target date for achieving each goal, and relevant notes. This is thought to remind participants of their goals and to keep them focused. It also aids in tracking participants' progress over time as they achieve short-term and long-term goals.

4. Monetary incentives may also motivate people to pursue their goals.

Some research shows that [incentives](#) can spur motivation toward goal pursuit. Monetary incentives can take the form of cash, checks, gift cards, transportation benefits, or other items that can help participants, such as household supplies. Practices that exemplify this strategy include the following:

- **SparkPoint Oakland** in Oakland, California uses a variety of incentives to recruit and engage participants in services across the pillars. SparkPoint makes food available to participants who come in for events or for coaching, and participants who fill out paperwork with SparkPoint's employment partner receive a Visa gift card. To engage participants in coaching and encourage saving while simultaneously enhancing their financial stability, SparkPoint also promotes asset building through matched savings programs. One program (the federal Individual Development Account) matches up to \$2,000 saved toward buying a home or paying for education, while a smaller-scale program matches up to \$500 as long as participants attend their scheduled coaching sessions.
- Several organizations (**WPSI**, **Goodwill**, the **North Lawndale Employment Network** in Chicago, Illinois; and **Foothills Family Resources**, a rural-based organization in Slater, South Carolina) offer monetary incentives to participants when they participate in services and meet goals in different pillars. Staff said that incentives help to ensure that participants have the

means to attend programming and provide some level of compensation for the time that participants spend in programming while they are unemployed.

CONSIDERATIONS FOR IMPLEMENTING RESEARCH-INFORMED STRATEGIES

The strategies summarized in this brief can help practitioners at WFSN organizations encourage participants to access services across pillars and pursue activities intended to help them achieve self-sufficiency. Organizations that do not currently use these strategies may want to test them out with participants—perhaps starting with a subset of participants, such as those in one program—to assess whether these strategies boost program take-up and persistence or improve participant outcomes.

Tailoring these strategies to participants' needs may be critical. Some organizations may find it more important to address recruitment, whereas others may find that their primary challenges are with program persistence. For WFSN organizations in particular, take-up of services across pillars may be a primary concern if participants are focused only on their immediate needs in a single pillar. To promote service take-up across pillars, staff may want to work with participants to set goals in each pillar, which could encourage participants to take up services in each pillar in pursuit of those goals. Tracking goals and coaching participants along their journey toward goal attainment can facilitate ongoing service take-up across pillars. WFSN organizations facing general recruitment or program completion challenges could incorporate strategies informed by behavioral science, such as asking participants to complete commitment devices or offering monetary incentives to spur motivation.

These strategies may help WFSN organizations better serve their participants by encouraging service take-up across pillars and engagement with services. ISD, supported through goal setting, may help participants become self-sufficient in the long run. Organizations under the WFSN umbrella can play a critical role in testing new ways to ensure delivery of services across pillars—including strategies to help participants set and pursue goals.

