

EXECUTIVE SKILLS IMPLEMENTATION TOOLKIT:

A Guide to Applying Executive Skills in Workforce Development Programs and Employment Social Enterprises

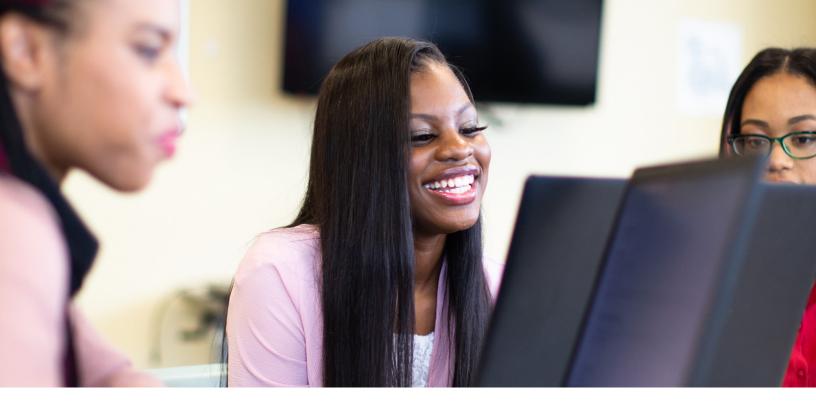


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Applying an Executive Skills Approach in Your Workforce Development Program

IMPLEMENTATION TOOLKIT

WELCOME!

If you're interested in learning about how Executive Skills can improve the impact of your Workforce Development Program, this toolkit can help. Developed by New Moms' Workforce Development Program, these seven integrated tools walk frontline staff and program leaders through the core components of an Executive Skills Approach, all designed by and for Workforce Development practitioners. The enclosed tools guide you through reflective questions, tasks, and activities so you can consider why, what, and how you could affect the likelihood and rate at which participants progress towards and achieve their goals in your program.

New Moms piloted its Executive Skills (ES) Approach in 2016, and saw a rapid and notable improvement in participant outcomes. The approach resonated with participants and staff alike, and New Moms expanded the approach fully across its Job Training program and social enterprise, and scaled to New Moms' Housing and Family Support programs. The implementation and expansion of New Moms' ES Approach is detailed in this toolkit's supplemental paper, the Executive Skills Implementation Case Study. While you can use the toolkit independent of the case study, we encourage you to use the tools and the case study in tandem: administer the tools while learning how New Moms applied these steps and processes directly into their programming, and how you can, too.

WHY TAKE AN EXECUTIVE SKILLS APPROACH?

The ES Approach is founded in a core belief that everyone has the strength, ability, and potential to achieve their goals. Often Workforce Development programs are striving to achieve externally-driven jobrelated outcomes that intend to move the needle on a participant's or family's economic mobility: credentials earned, hourly wage rate, job retention, and more. An ES Approach helps participants progress towards their short-term goals and sharpen their skills and capabilities to succeed at work, at home, and in the community. The approach requires a coaching mindset whereby staff partner with participants to create the context and environment in which goal setting and progress can thrive, while sharing knowledge, skills, training, and tools that participants can use to progress towards their own goals. This goal progression is an important form of impact that can have a significant effect on the participant's engagement in your program, their own self-confidence

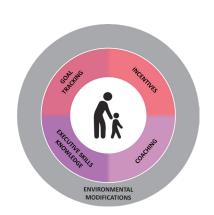


Figure 1: New Moms'
Executive Skills Approach

and self-efficacy around goal setting and goal achievement, and ultimately, may support longer-term wellbeing.

SETTING THE FOUNDATION FOR THE EXECUTIVE SKILLS APPROACH

Executive Skills are the twelve brain-based abilities that regulate how we plan things, organize things, and get things done. Awareness of how these skills manifest into behaviors lays the foundation for successfully designing and implementing your program's Executive Skills Approach.

An Executive Skills Approach has five core components: Environmental Modifications, Executive Skills knowledge, coaching, SMART Goal tracking, and Incentives. All components have the same twofold goals: to reduce participant barriers to success, and increase the likelihood of participant goal achievement in their personal and professional lives. For more detailed information on the five components of an Executive Skills Approach in practice, please refer to the Executive Skills Implementation Case Study and the short, 7 minute overview video.

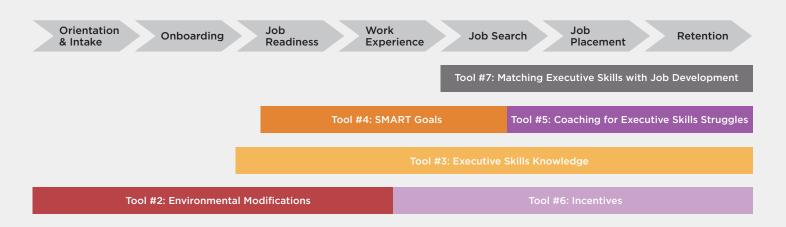
HOW TO USE THIS TOOLKIT

This toolkit will help you translate the five components of an Executive Skills Approach from theory into practice in your program. The tools are designed to be used in sequence, beginning with Tool #1 – Readiness Checklist, although many of the activities within the tools can be used at any time in your program, independently of other components of an ES Approach, and do not require significant prework or resources to adapt and use.

Four of the five interventions highlighted in the Executive Skills Approach figure above (see Figure 1) have specific tools listed below. In this toolkit, the fifth component in the Executive Skills Approach wheel, Executive Skill Coaching, refers to the application of all of these tools and strategies—as such there is no separate coaching tool.

APPLICATION OF THE TOOLKIT IN YOUR WORKFORCE DEVELOPMENT PROGRAM

This generic Workforce Development program pathway displays an example of when and where each color-coded tool might be applicable.



TOOLKIT TABLE OF CONTENTS

An overview of each tool is listed below. Each tool is color coded for ease of maneuvering through the toolkit.



Click each Tool number to go directly to that page.

TOOL #1

Readiness Checklist

Understand your organization's or Workforce Development program's readiness to move towards adopting an Executive Skills Approach or any of its components.

TOOL #2

Environmental Modifications

Learn how to survey and modify your program environment—the physical space, materials, tasks, and processes and procedures—to alleviate barriers and support participant goal achievement.

TOOL #3

Executive Skills Knowledge

Learn how Executive Skills develop and manifest as behaviors in a workforce development setting, and how to administer and guide a conversation with colleagues and participants about their Executive Skills Profiles.

TOOL #4

SMART Goals

Learn how to set shorter-term SMART Goals that are a good fit with Executive Skills, in order to support increase goal achievement rates. Learn how to scaffold SMART Goals over time towards more complex long-term goals.

TOOL #5

Coaching for Executive Skills Struggles

Learn how to support and mitigate common Executive Skills struggles with specific, concrete strategies devised for each Executive Skill.

TOOL #6

Incentives

Learn about intrinsic and extrinsic motivations and how to align them with incentives that remove barriers, nudge progression to overcome obstacles, and reward success.

■ TOOL #7

Matching Executive Skills with Job Development

Learn how to align Executive Skills strengths and struggles with tasks and behaviors required on the job. Find a good fit between employer partners and participants, reducing employee turnover and improving job retention.

Note to practitioners: An Executive Skills Approach also requires familiarity and practical application of Motivational Interviewing (MI) techniques. While not a tool in this toolkit, we refer to MI frequently and include resources for bolstering MI in your program. See the Appendix in Tool #1 - Readiness Checklist for more info on MI.

SHARE YOUR EXPERIENCE

Would you like to talk with New Moms about designing and applying an Executive Skills Approach into your Workforce Development program? Would you like support with this toolkit? Want to share your experience with these tools and an Executive Skills Approach? We would love to hear from you.

Reach out to us and learn more about New Moms' Research, Learning, and Innovation work at https://newmoms.org/what-we-do/research-learning-innovation/.

EXECUTIVE SKILLS IMPLEMENTATION TOOL #1

Organizational Readiness for an Executive Skills Approach



SUMMARY

An Executive Skills Approach, or independent components of the approach, can work in a variety of Workforce Development programs serving diverse populations of participants. This quick survey can help you assess the components of your broader organization's culture, beliefs, systems, and practices in terms of readiness for an Executive Skills Approach. It will help you consider which aspects could create or detract from a strong foundation for an Executive Skills Approach to thrive in your organization.

HOW TO USE THIS TOOL

For each question, please select the answer that best describes your organization. Add up your overall score at the bottom of the survey to identify your organization's readiness to pilot or implement an Executive Skills Approach or individual Executive Skills-informed interventions.

Many aspects of an Executive Skills Approach can be tested and implemented quickly into a Workforce Development program; implementing Executive Skills does not require wholesale commitment to the entire approach. For more information about how New Moms' Workforce Development program prepared for its Executive Skill work, and examples of how each of the components of the Executive Skills Approach is applied in the program, please refer to New Moms' Executive Skill Implementation Case Study.

COMPLETE YOUR READINESS SELF-ASSESSMENT

Organizational Culture and Infrastructure

1. Leadership: Your organization has buy-in from and leaders who promotes the value of new or promising practices for services that benefit your staff and participants over the value of the status quo.

Organizational leaders promote the status quo and do not seek growth in service delivery methods.

Leaders in some departments are somewhat open to trying new, promising practices.

Leaders agency-wide understand the value of trying new service approaches and support testing ideas.

2. Flexibility & Change: Your organization has clear processes and strategies to guide change, as well as successful history of or experience with implementing programmatic changes.

Organization does not have processes, strategies, or successful experience implementing significant change.

Some departments in the organization have processes, strategies, and successful experience implementing significant change.

Organization has processes, strategies, and/or successful experience implementing significant change.

3. Continuous Quality Improvement: Your organization has environment, policies, procedures, and tasks that can be adjusted and the systems and capacity in place to implement change.

1

Organization can not or is not interested in making changes to policies, programs and services, or physical environment.

2

Organization has limited capacity, autonomy, and interest in making changes to its policies, programs and services, or physical environment.

3

Organization has or can create I capacity, autonomy, and interest in making changes to its policies, programs and services, or physical environment.

4. Staff training: Your organization dedicates time and effort to providing ongoing staff training in service strategies and approaches.

1

Organization does not dedicate time to or organize staff training to service approaches during work hours.

2

Organization dedicates occasional time and effort to staff training on service approaches during work hours. 3

Organization dedicates time and coordinates frequent and strategic staff training on service approaches during work hours.

5. Strengthening Executive Skills: Your organization recognizes the benefit to strengthening Executive Skills in your priority population, and the need to support these skills through changes to the organization's systems, approach, and environment.

1

Organization does not recognize the benefit of strengthening Executive Skills nor the external context in which they develop.

2

Organization occasionally recognizes the benefit of strengthening Executive Skills and/ or the external context in which they develop.

7

Organization recognizes the benefit of both strengthening Executive Skills and the external context in which they develop.

Organizational Beliefs and Practices

6. Trauma Awareness: Your organization understands the effects of scarcity, toxic stress, and trauma on brain development and behavior and embeds trauma-informed care into operations, practices, and services.

1

Organization does not recognize or discuss the impact of scarcity and trauma on stakeholders.

2

Organization acknowledges the impact of scarcity and trauma and is beginning to implement or has some trauma-informed practices in some departments.

3

Organization discusses scarcity and trauma and embeds traumainformed care in operations, practices, and services.

7. Growth Mindset: Your organization overall has a growth mindset, with staff who believe in the potential for their program, colleagues, organization, and participants to grow and change over time.

1

Organization and majority of program staff has fixed mindset that people are limited in their potential for growth and change.

2

Organization and program staff sometimes has a growth mindset, and sometimes a fixed mindset about potential for growth and change.

3

Organization and program staff seek out growth and change, and consistently maintain growth mindset even in face of setbacks. **8. Participant-centered:** Your organization is committed to supporting participants as they identify and progress towards the goals they set for themselves and their families.

1 2 3
Not at all participant-centered. Somewhat participant-centered. Very participant-centered.

9. Motivational Interviewing: Your organization is familiar with and practices Motivational Interviewing techniques that help participants identify and reflect on their choices, goals, and possibilities for their futures.

Organization is not at all familiar with or practicing Motivational Interviewing techniques.

Organization is, or some departments are, somewhat familiar with or practicing Motivational Interviewing techniques.

Agency-wide, all departments in organization are familiar with and practicing Motivation Interviewing techniques.

10. Stages of Change: Your organization is familiar with how individuals move through the Stages of Change, and implications on motivation and goal progression.

Organization is not at all familiar with Stages of Change and its implications.

Organization is, or some departments are, somewhat familiar with the Stages of Change and its implications.

Agency-wide, all departments in organization are familiar with the Stages of Change and its implications.

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CHECK BELOW TO SEE THE NEXT STEPS THAT MIGHT SUIT YOUR ORGANIZATION AND PROGRAM

CHECK BELOW TO SEE THE NEXT STEPS THAT MIGHT SUIT YOUR ORGANIZATION AND PROGRAM					
You might take the following steps:					
 Engaging your colleagues in conversations about each of these questions. Ask yourself and them: What do they want to learn more about? How do they see each element showing up in their work? Does your team want to improve participant outcomes, and do they see any ways their new learning could help them do that? Review the <u>Executive Skills implementation Case Study</u> and additional, supplemental tools. 					
Move forward with <u>Tool #2: Environmental Modifications</u> .					
Determining which core concept(s) are less familiar or comfortable for your staff and reading the corresponding resources listed in the appendix below.					
• Engaging your colleagues in conversation about each core concept that they read about. Ask yourself and them: What does this new learning spark in us? How does this new information or element show up in their work? How might they imagine this work applying to improve participant outcomes?					
Review <u>New Moms Executive Skills implementation case study</u> and additional, supplemental tools.					
Review New Moms Executive Skills Pilot White Paper.					
Review the suggested reading in the appendix below.					
Move forward with <u>Tool #2: Environmental Modifications</u> .					

Review New Moms Executive Skills implementation case study and additional, supplemental tools Review New Moms Executive Skills Pilot White Paper. Review the suggested reading in the appendix below. Encourage a peer, peers, or your supervisor to read the Executive Skills Implementation Case Study with you and discuss the areas that are most interesting to you—and why. Engaging your colleagues in conversation about each core concept that they read about. Ask yourself and them: What does this new learning spark in us? How does this new information or element show up in their work? How might they imagine this work applying to improve participant outcomes? Engage with your supervisor about one of these core concepts—or more. Which will they be open to discussing with you? Which ones will create gains for them in their objectives?

READINESS CHECKLIST APPENDIX

Concept	Resources
Trauma, Toxic Stress, and Scarcity	Review the Guide <u>Aces and Toxic Stress: Frequently Asked Questions</u> by the Center on the Developing Child at Harvard University
	 Read the book Scarcity: Why Having Too Little Means So Much by Sendhil Mullainathan and Eldar Shafir
	Read the article <u>Poverty Interrupted: Applying Behavioral Science to the Context of Chronic Scarcity</u> by ideas42
	 Read the article <u>How Poverty Taxes the Brain</u> by Emily Badger
	Read the brief <u>Using Brain Science to Design New Pathways out of Poverty,</u> by EmPath's Elisabeth Babcock
Growth Mindset	Read the article <u>Harnessing the Power of High Expectations</u> by EmPath's Elisabeth Babcock
	Read the book <i>Mindset</i> by Carol Dweck
	Access the resources, videos, and worksheets on the MindsetWorks website
Participant-centered	Watch the <u>webinar on Family-Centered Coaching</u> from The Prosperity Agenda and Aspen Institute
	Watch the short <u>Coaching Up Close webinars</u> from The Prosperity Agenda
Motivational Interviewing	Motivational Interviewing Network of Trainers (<u>MINT</u>)—including access to staff training opportunities
	Family Centered Coaching Readiness Assessment
	Motivational Interviewing Pocket Guide
Stages of Change	Review this <u>outline of the Stages of Change</u> from Virginia Tech
	Watch this video on Stages of Change

EXECUTIVE SKILLS IMPLEMENTATION TOOL #2 Environmental Modifications



SUMMARY

Sometimes our Workforce Development programs themselves get in the way of participant success. Modifying our program environments—the physical space as well as the policies, processes, materials, technology, and tasks we ask of participants—can decrease the cognitive tax on participants and give them more bandwidth to align their behaviors with their motivations and focus on progression towards their goals. Removing environmental barriers to success can increase program engagement, and is a practical, and often inexpensive and quick, method to increase the likelihood of participants' goal achievement. Participants who learn how to modify their own environments will be more likely to achieve their goals, and more likely to succeed in their subsequent place of employment.

HOW TO USE THIS TOOL

This tool outlines the categories of Environmental Modifications your Workforce Development program, coaches, and individual participants can explore to decrease barriers to success, increase engagement, and improve goal achievement. Although Executive Skills knowledge is not necessary to devise and apply Environmental Modifications, it is beneficial to understand the link between Executive Skills and behaviors so you can target the modification for the specific behavior. You can learn more about Executive Skills knowledge in <u>Tool #3 – Executive Skills Knowledge</u>, as well as this toolkit's complementary <u>Executive Skills Implementation Case Study</u>.

Job Developers can also use this tool when partnering with certain employers, in order to consider or suggest modifications that might help a recently hired graduate of your program more likely to succeed on the job and retain their employment.

ENVIRONMENTAL MODIFICATIONS IN YOUR WORKFORCE DEVELOPMENT PROGRAM

Environmental Modifications are as varied as programs, and can be applied at any point in your Workforce Development program's service delivery flow. We encourage you to think about environmental modifications from a participant's very first touch point with your program, in order to decrease barriers to access your program and increase the likelihood of program persistence through this early period when attrition levels can be high. An example of where you can apply Environmental Modifications in your Workforce Development Program is below, starting even before participants are enrolled in your program.



For more information about and examples of how New Moms uses Environmental Modifications in our Workforce Development program please refer to New Moms <u>Executive Skills Implementation Case Study.</u>

MODIFYING YOUR PROGRAM'S ENVIRONMENT TO SUPPORT GOAL ACHIEVEMENT

Use the activity and questions below to brainstorm potential environmental modifications you could apply to your Workforce Development program in order to support participant goal progression.

Environmental Modification Guiding Questions

List the phases of your workforce development program beginning when you first engage with a candidate or participant. Example:

Orientation & Onboarding
Your Workforce Development Program Phases:

For each phase of your program ask the following questions:

- What are the program goals in this phase?
- What are the participant goals in this phase?

Next, ask: How might we modify each of the following program components in each phase?

- Our program's process, to make it easier and more likely a participant can accomplish their goal. (Example: Reduce duplication in intake paperwork by consolidating information to fewer forms.)
- Our program's policies and procedures, to make it easier and more likely a participant can accomplish their goal. (Example: Participant lunch break is extended by 5 minutes to accommodate long wait times for the microwave.)
- The physical environment (classroom, coaching room, social enterprise, lobby, hallways, walls, floors, furniture, noise level, etc), to mitigate behaviors resulting from common Executive Skills struggles. Can we create more breathing room, privacy, clarity or calm here? (Example: Support improved time management behaviors by hanging a clock on the wall.)
- A task itself, so the participant is more likely to complete the task and build skills for goal progression and goal achievement. (Example: If a participant has an Executive Skill struggle with task initiation, assign them the start time for their task instead of giving an open ended start time.)

- Written documents and materials, so they meet the literacy level of your participant(s), take the participant's perspective, are up-to-date, and have clear and simple instructions, deadlines, and/or contact information.
 (Example: Update your program's advertising flyers to ensure they are reading at the correct literacy level for your candidates and have the name and contact info of the correct intake person.) Check the literacy level of your content by using the MS Word "Options" window to "Show readability statistics" to see the reading grade level of your content.
- Or use technology, in order to remind, nudge progress, or otherwise communicate with a participant in ways that make it easier for them to engage with the program and their goals. (Example: Send a personalized text to the participant reminding them of their upcoming appointment date and time, including the coaches' direct phone number in case of questions.)

EXECUTIVE SKILLS IMPLEMENTATION TOOL #3

Executive Skills Knowledge



SUMMARY

In a workforce context, Executive Skills knowledge can help people understand what strengths they have that will help them accomplish their professional and educational goals, and what might get in the way. Knowledge of Executive Skills will help coaches and participants set more realistic and achievable goals, devise effective incentives to nudge goal progression, and modify the environment to increase likelihood of goal attainment. Your Workforce Development program's knowledge of Executive Skills and an understanding of the behaviors that might result are the core foundation an Executive Skills Approach.

HOW TO USE THIS TOOL

This tool suggests how your staff and participants can learn about Executive Skills—what the skills are, each individual's "Executive Skills profile" of strengths and struggles, and how these skills might manifest in the program, social enterprise, or workplace. This tool refers and links to the essential Executive Skills knowledge tools: Executive Skills Profile for Adults and Executive Skills Definitions, ,developed by Dr. Dick Guare and Dr. Peg Dawson. The tool asks questions to help you determine how you want to apply Executive Skills knowledge in your programming, and partner with participants as they learn about their Executive Skills.

Follow the steps and tasks in order, or simply review the questions to consider as you think about how Executive Skills knowledge might impact outcomes of your Workforce Development program and your participants' professional goals.

EXECUTIVE SKILLS KNOWLEDGE IN YOUR WORKFORCE DEVELOPMENT PROGRAM

Executive Skills knowledge can be applied at any point in your Workforce Development program's service delivery flow, though is a prerequisite for effective SMART goal setting. As such we encourage you to engage in Executive Skills knowledge work earlier in your program. An example of where you can launch Executive Skills knowledge in your Workforce Development Program is below, starting in the beginning of Job Readiness training.



For more information about how New Moms embeds Executive Skills knowledge in our Workforce Development program please refer to <u>New Moms Executive Skill Implementation Case Study</u>.

LEARN ABOUT EXECUTIVE SKILLS

Executive Skills are the 12 brain-based abilities that each of us has, that we employ to organize things, plan things, and get things done. We all have Executive Skills strengths and struggles: non-judgmental understanding our own Executive Skills and the Executive Skills of others is the core of Executive Skills Approach.

Before applying any Executive Skills intervention, it is essential to know our own Executive Skills. Then we can learn what the Executive Skills are, how they develop, and how they may result in behaviors relevant in workforce development.

Step 1: Identify your own Executive Skills strengths and struggles

TASK:

- Ask all program staff to take and score their own <u>Executive Skills Profiles</u>
- Resource: Webinar on Administering the Executive Skills Profile.
- Share the results with each other in a group. Every person shares their strongest three and weakest three Executive Skills and considers the guiding questions.

CONSIDER:

- Does anything here surprise you? What, and why?
- How do your Executive Skills strengths and struggles manifest as behaviors in the workplace? In your relationships with others? In your performance?
- It's not unusual to over- or under- estimate our skills.
 How might you envision your profile changing over time, especially based on new learning, experiences, or changes in your environment?
- What tools or practices do you and your colleagues use to mitigate your struggles?
- How might learning about your colleagues Executive Skills strengths and struggles affect how you collaborate, hire new teammates, or organize tasks?
- Are you willing to publicly display the results of everyone's Executive Skills profile, to normalize it and bring attention to the centrality of Executive Skills?

Note to practitioners: A core aspect of Executive Skills-based programming is the agency, dignity, and ability of each person—we all get to determine our own Executive Skills profile.

Do not make assumptions about someone else's Executive Skills strengths and struggles. The Executive Skills Questionnaire is a self-assessment tool that gives each person the opportunity to identify their own range of Executive Skills strengths and weaknesses, and how they see that resulting in behaviors they may or may not want to change.

Step 2: Learn about the 12 Executive Skills

TASK:

 Review the <u>Executive Skills</u> <u>definitions</u> and discuss with your team.

CONSIDER:

- What is the difference between Executive Skills and the resulting behaviors?
- How do you see each of these Executive Skills manifest as a strength and as a struggle within the participants in your workforce development program?
- Which Executive Skills and behaviors are most important for participants' success in the industry(ies) you train for?
- Which Executive Skills strengths might your employer partners require or struggles might get in the way of successful job retention with them?

Step 3: Understand how Executive Skills Develop

TASK:

- Review these short videos on Executive Skills development from the Harvard Center on the Developing Child: <u>Executive</u> <u>Function: Skills for Life and</u> <u>Learning</u>
- How Children and Adults Can Build Core Capabilities for Life
- Read the white paper from ideas42, <u>Poverty, Interrupted</u> to learn about how scarcity and trauma might impact brain development.

CONSIDER

- How might your environment, background, and experiences have affected your own Executive Skills?
- How might poverty, trauma or other challenges affect the Executive Skill development and behaviors of your participants, your colleagues, employer partners, and yourself?
- How could your program support participant and staff Executive Skills strengths and mitigate struggles?

APPLY EXECUTIVE SKILLS KNOWLEDGE TO PROGRAMMING

Now you and your team are familiar with Executive Skills, understand your profiles, see how strengths and struggles manifest as behaviors, and are aware of this knowledge might enhance your program. Next, consider how to apply Executive Skills Knowledge in order to enhance your program and services.

Step 4: Identify where ES knowledge could help improve outcomes

TASK:

You can conduct this activity independently or with your team. Draw out your service flow—the way participants progress through your program—in phases. Phases could include:

- Orientation/intake
- Onboarding
- Classroom training
- 1:1 coaching
- Social enterprise or transitional job or internship
- Job Search and/or Job Placement
- Retention & alumni support
- Any others that fit your program!

CONSIDER:

- Where—and how—could Executive Skills knowledge affect each of those phases?
- How might participants benefit from knowledge of their own Executive Skills and behavior patterns during these phases of your program? For example:
 - Late arrival at orientation or meetings could indicate a struggle with time management (or lack of access to transportation),
 - Starting assigned tasks during a transitional job shift but not finishing them could indicate a struggle with goaldirected persistence (or too many tasks assigned at once),
 - Forgetting to bring in pay stub after securing employment could indicate a struggle with working memory (or your office hours don't align with her work schedule).

Step 5: Determine if, when, and how you might want to introduce Executive Skills knowledge to your participants.

TASK:

- Review your service flow map and identify when your staff and participants could discuss Executive Skills knowledge.
- Read the <u>Executive Skills</u> <u>implementation case study</u> for an example of how and when New Moms' applies Executive Skills knowledge to the workforce program.

CONSIDER

- When does Executive Skills knowledge have the most impact—for participants and staff?
- How might Executive Skills knowledge impact your participants' goals throughout your program? How might it affect your program design itself?
- Could you introduce Executive Skills knowledge to participants without making any other ES-informed changes to your program? What might you expect would happen as a result either way?

DETERMINE YOUR NEXT STEPS FOR EXECUTIVE SKILLS KNOWLEDGE

Yes, We want to introduce participants to Executive Skills knowledge.	Maybe? Or maybe not. We are not sure yet or do not want to introduce participants to Executive Skills knowledge.
 Review with your team and ask the following questions: WHAT do we want to accomplish by introducing participants to Executive Skills? WHEN do we introduce this framework to participants? HOW do we introduce this framework to participants? WHO needs to be involved? Return to Step 1 above and follow the steps and tasks for participants in group or 1:1 settings. Continue to review the subsequent Executive Skills implementation tools to consider additional ways to integrate Executive Skills knowledge into goal setting, incentives, environmental modifications, and job development. 	 With minimal Executive Skills knowledge—but an understanding of your participants' common goals and behaviors—you can still consider how to create strengths-based incentives within your workforce development program or social enterprise using Tool #6: Incentives. Similarly, you can consider how to modify the environment, tasks, policies, and practices in your workforce development program or social enterprise to help participants achieve success with Tool #2: Environmental Modifications in this toolkit.

EXECUTIVE SKILLS IMPLEMENTATION TOOL #4

Aligning SMART Goals and Executive Skills



SUMMARY

Setting SMART goals that are aligned with Executive Skills strengths, struggles, context, and motivation is an essential part of coaching within an Executive Skills Approach. Participants who practice Executive Skills-informed goal setting alongside their coach build goal setting "muscle" so they can subsequently set and progress towards goals after they graduate from your program, applying those skills into their next employment situation and at home. This tool helps to outline the steps you and your team can take to make sure SMART goals are a good fit with participants' Executive Skills profile. SMART goal setting in the Executive Skills context requires familiarity with Motivational Interviewing, Executive Skills knowledge, and the impact of scarcity on behaviors and decision-making.

HOW TO USE THIS TOOL

This tool outlines the basic steps towards supporting participants as they set goals within your Workforce Development program. The first section includes important questions about the essential coaching skills needed to facilitate effective SMART goal setting. The second section walks you through the steps and tasks for setting SMART goals that are a good fit with the participant's Executive Skills strengths and struggles, motivations, and environmental context. The third section suggests steps for checking in on goal progression and "scaffolding" smaller goals up into larger and more complex SMART goals over time. Finally, there is a SMART goal Setting template that your coaches can use to inform their SMART goal setting conversations with participants.

Employment social enterprises can also incorporate SMART Goals into their production or service goals! You can use this tool and the SMART Goal Worksheet in a production or service goal-oriented environment, i.e. manufacturing throughput, crew clean-up tasks, or inventory counted.

Setting Executive Skills-informed SMART Goals requires knowledge of a coach and participants' Executive Skills Profile, as well as familiarity and practice using Motivational Interviewing techniques. We recommend reviewing the corresponding <u>Environmental Modifications tool</u> and <u>Executive Skills knowledge tool</u> in advance of setting SMART goals.

For an example of a SMART Goal form in use in New Moms' Workforce Development program, please see the <u>TOP Values form</u> in the next section. For more information about how New Moms aligns SMART goals with Executive Skills in our Workforce Development program and examples of how SMART Goals are incorporated into New Moms' social enterprise production goals, please refer to <u>New Moms Executive Skill Implementation Case Study</u>.

SMART GOALS IN YOUR WORKFORCE DEVELOPMENT PROGRAM

An example of where you can apply SMART Goal setting approach in your Workforce Development Programs is below, starting after you have introduced participants to Executive Skills knowledge.



BEFORE YOU BEGIN—FOUNDATIONAL SKILLS SELF ASSESSMENT

Executive Skills-informed SMART Goal setting requires pre-work. Please answer the following questions to determine if you're ready for Executive Skills-based SMART Goal setting.

1. Motivational Interviewing

How familiar is your program with using Motivational Interviewing techniques with participants?

Not at all familiar or never practicing

2Somewhat familiar or practicing occasionally

3Very familiar or practicing frequently

If you score below 3, you can boost your familiarity and engagement with Motivational Interviewing through the following resources:

- Motivational Interviewing Network of Trainers (MINT) - Including access to staff training opportunities
- Family-Centered Coaching <u>Readiness</u>
 Assessment
- Motivational Interviewing Pocket Guide

2. Executive Skills knowledge

Have your staff and participants completed the Executive Skills Profile and discussed their strengths and struggles with each other?

No, we have not completed
Executive Skills profiles or discussed
the results.

Some have completed the Profile, but others have not.

Yes, everyone has completed the Profile and know their strengths and struggles.

If you score below 3, you can boost your familiarity and engagement with Executive Skills knowledge through our Executive Skills Knowledge tool, Executive Skills Profile, and New Moms' Executive Skills Implementation Case Study.

3. Impact of Scarcity

How familiar is your program with the impact of chronic or acute scarcity on behavior, specifically job readiness or job performance?

Not at all familiar or never practicing

Somewhat familiar or practicing occasionally

Very familiar or practicing frequently

If you score below 3, you can boost your familiarity and engagement with the impact of scarcity on behaviors and goal setting by:

- Read the book <u>Scarcity: Why Having Too Little</u> <u>Means So Much</u> by Sendhil Mullainathan and Eldar Shafir
- Read the article <u>Poverty Interrupted</u>: <u>Applying</u> <u>Behavioral Science to the Context of</u> <u>Chronic Scarcity by ideas42</u>
- Read the article <u>How Poverty Taxes the Brain</u> by Emily Badger

SETTING EXECUTIVE SKILLS-INFORMED SMART GOALS

SMART goals are Specific, Measurable, Achievable, Realistic and Timely goals that can help people organize, plan, and get things done. In Executive Skills-based goal setting, SMART goals must take into consideration a participant's Executive Skills strengths and struggles so that the goals are in fact realistic and achievable, mitigating anticipated obstacles given the Executive Skills profile of the individual.

The step by step guide below can help your coaches become more comfortable with helping their participants align SMART goals with their Executive Skills.

Step 1: Coach & participant are both familiar with the participants' Executive Skills strengths and struggles

TASK:

Review the participants' Executive Skills Profile or ask the participant to describe their ES strengths and struggles and how they manifest in the workplace.

CONSIDER:

- What are the participants' strengths and struggles?
- What behavior patterns does this result in? Is the participant aware and if so, are they adapting or making changes to their behaviors? If so, how?

Step 2: Participant identifies a short-term goal they would like to work on.

TASK:

Use SMART Goal Worksheet below to guide participants through SMART Goal setting process.

Example: New Moms' TOP Values form.

CONSIDER:

- Coach helps participant ensure the SMART Goal fits within the "SMART" framework and align with a larger, longer-term SMART goal.
 - For example: a larger goal is "Get my GED by June 2020" and a SMART goal is "Review GED website by tomorrow at 5pm to learn the cost of registration."
- Is the goal on a very short and defined time-horizon so that it feels relevant to their larger goals, and the participant is very likely to succeed?
- How will the participant know they have accomplished their goal? How will the coach?

IMPORTANT: A core aspect of Executive Skills-based programming is the agency, dignity, and ability of each person—we all get to determine our own Executive Skills profile.

Do not make assumptions about someone else's Executive Skills strengths and weaknesses. The Executive Skills Profile is a self-assessment tool that gives each person the opportunity to identify their own range of Executive Skills strengths and struggles, and how they see their skills resulting in behaviors they may or may not want to change.

Over time, coaches may notice differences between a participant's Executive Skills Profile and daily behaviors. Coaches can discuss this observation with participants, but ultimately each individual gets to self-determine their Executive Skills strengths and struggles.

Step 3: Coach helps participant see the "goodness of fit" between the SMART Goal and the participant's ES strengths and struggles to ensure alignment and goal achieveability.

TASK:

Use Motivational Interviewing techniques to determine the participants level of motivation towards the goal. If they are not motivated for the goal, do not set the goal but instead use MI methods to engage in coaching instead.

See <u>Tool #5: Coaching for Executive</u> <u>Skills Struggles</u>

CONSIDER:

- Is the participant motivated to work towards the goal?
 Consider "goodness of fit" between the SMART Goal itself and the participant's Executive Skill profile, their environment, and how important the goal is to them.
- Is the SMART Goal calling on the participant to use their Executive Skills strengths? Does the goal call on the participant's Executive Skills struggles? How can you both plan for the obstacles that might get in the way—and consider how the participant can set intentions for actions when that arises?
- How confident is the participant that they will accomplish the goal? If they are not confident, what can you do to change the goal itself or the plans for them to achieve it so they are more confident in their ability to succeed?

A SMART Goal Example

Your participant has an Executive Skills struggle with time management.

A strong, well-aligned SMART goal about "Attend my doctor's appointment on Thursday at 8am" will take this into consideration.

A coach would non-judgmentally ask the participant questions about how time management might result in behaviors that prevent them from accomplishing their goal (What if the bus is delayed? What if their kid throws a tantrum as they walk out the door?).

The coach would help the participant generate ideas for mitigating steps or modifications the participant can make that will allow them to achieve their goal, such as an environmental modification (setting a series of alarm clock notifications).

The coach could offer incentives to help nudge them along in their goal (a gift card to a cafe for an early AM coffee). Similarly, the goal might be changed altogether and re-framed to take advantage instead of the participant's afternoon energy and the more reliable bus schedule: "Attend my doctor's appointment on Thursday at 3pm."

SMART GOAL PROGRESSION AND SCAFFOLDING OVER TIME

Checking in with participants their progression towards their SMART Goal is essential. It holds coaches and participants accountable to each other and themselves, and helps illuminate for both changes in motivation, context, goal progression and achievement, and readiness for the next steps towards more complex SMART Goals over time.

The next steps will walk you through checking in with participants on their goal progression and building the "goal setting muscle" to set and pursue more complex SMART goals over longer periods of time.

Step 4: Coaches and participants check-in on goal progression

TASK:

Review the SMART Goal sheet used in the previous session.

Coach uses Motivational Interviewing techniques to understand if, how, and why the participant did or did not achieve their goal.

CONSIDER:

- How does the participant feel about their goal? Did they achieve it, start it but not finish, or not start it at all? Why?
- What was easy, and what was hard? What got in the way, and what didn't? What Executive Skills strengths and struggles did they see come into play?

Yes—Participant achieved their SMART goal: Celebrate and reward the participant! This can anything that is meaningful to the participant and aligned with the size of the goal itself: words of praise, a tangible piece of paper or a public recognition, gift cards, or monetary payment.

No—Participant started but did not achieve their goal: Do they want to adjust the goal and continue working towards it? Or, would they like to set a new goal? If so, return to Step 1 and repeat.

No—Participant did not start or finish their goal: Do they want to adjust the goal and continue working towards it? Or, would they like to set a new goal? If so, return to Step 1 and repeat.

Step 5: Scaffold Small Goals to Larger Goals Over Time

TASK:

Use the <u>SMART Goal Worksheet</u> below to guide the repeated Goal setting process to "scaffold" goals over time..

With participant who has achieved multiple goals and feels motivated and confident in their ability to set and achieve a goal, including what to do to adjust or overcome obstacles, coaches can begin to "scaffold" their goals with them over time—setting SMART Goals that build on the previous goals, may be slightly longer-term, or call on the participant to use more complex or newly developed behaviors or habits.

CONSIDER:

As coaches and participants set SMART goals, both can talk about slightly more complex goals, always engaging in Motivational Interviewing and the Executive Skills profile to determine Goodness-of-Fit between the Executive Skill and the goal.

- Ask participants to envision what new obstacles might arise, and how they plan on tackling them?
- What new skill, behavior, or habit will the participant use with this more complex goal?
- Will they require different, more valuable, or fewer incentives to pursue this goal?

SAMPLE SMA	RT GOAL WO	RKSHEET		Date:	
Used for both SMAF	RT Goal setting and	in subsequent	check-ins on SMA	RT Goal progres	ssion.
Participant name			Coach name		
Three Executive Skil	lls strengths				
Three Executive Skil	lls struggles				
My SMART Goal too	lay/this week is				
I will start my SMAR	RT goal by: (Day/Da	te/Time)			
STEPS I NEED TO TAK	E TO ACHIEVE MY GOA	L PLANNEI	O COMPLETION DATE	STARTED!	COMPLETED!
1.					
2.					
3.					
I will know I accomp	olish my SMART goa	al when I			
This week's SMART	goal helps me move	e forward towa	ards my long-term	goal of:	
□ Education□ Transportation□ Community Enga	☐ Parenting☐ Healthgement	☐ Employmer☐ Spirituality	nt	_	□ Legal □ Housing
What might get in t	he way of my SMAF	RT goal?			
If that happens I pla	n to				
	s this goal to me? That important Very important 6 7 8 9 10	nt			ny SMART Goal? ry confident 9 10
Our next coaching s	ession to check in c	on my SMART	Goal is		
Participant signature	е		Coach signature		

Sample: New Moms Workforce Development Daily TOP Values Form

Name Week

This week's goal:

SMART Goals are:

Specific: Who / What / Where?
Measurable: How much / How often?

Achievable: Yes / No Realistic: Yes / No Timely: When?

DAILY GOAL (Adding up to my weekly goal?)	I REACHED MY GOAL (YES/NO)	IF NOT, WHAT HAPPENED? (Choose one of the options from the list)
Monday		A. Lack of child care B. Lack of money C. Issues with family/another person D. Didn't feel like doing it E. Other
Tuesday		A. Lack of child care B. Lack of money C. Issues with family/another person D. Didn't feel like doing it E. Other
Wednesday		A. Lack of child care B. Lack of money C. Issues with family/another person D. Didn't feel like doing it E. Other
Thursday		A. Lack of child care B. Lack of money C. Issues with family/another person D. Didn't feel like doing it E. Other
Friday		A. Lack of child care B. Lack of money C. Issues with family/another person D. Didn't feel like doing it E. Other
	Goals out of 5 days	My biggest obstacle this week was:

Sample: New Moms Workforce Development Daily TOP Values Form

TOP VALUES	MONDAY		TUESDAY		WEDNESDAY		THURSDAY		FRIDAY	
Teamwork	STRENGTH	STRUGGLE	STRENGTH	STRUGGLE	STRENGTH	STRUGGLE	STRENGTH	STRUGGLE	STRENGTH	STRUGGLE
I offered help to a teammate today										
I asked a teammate for help today										
My team completed our SMART goal(s) for the day										
Ownership	STRENGTH	STRUGGLE	STRENGTH	STRUGGLE	STRENGTH	STRUGGLE	STRENGTH	STRUGGLE	STRENGTH	STRUGGLE
I accepted feedback and/or self-corrected errors today										
I stayed focused and did not require redirection										
I applied my Executive Skills at work today										
Professionalism	STRENGTH	STRUGGLE	STRENGTH	STRUGGLE	STRENGTH	STRUGGLE	STRENGTH	STRUGGLE	STRENGTH	STRUGGLE
I arrived early today (both in the morning and after lunch break)										
I was in dress code today										
I verbally contributed to pre and post shift meetings today										

EXECUTIVE SKILLS IMPLEMENTATION TOOL #5

Coaching Strategies to Support Executive Skills Struggles



SUMMARY

Everyone has Executive Skills strengths and struggles, and these skills often manifest in common behaviors in the workplace: showing up tardy, procrastinating on big projects, getting angry when something goes wrong. The behaviors that result from weaker Executive Skills might inhibit goal progression or goal achievement for participants and coaches in your program and in their jobs post-placement. This tool suggests common strategies to mitigate these weaker skills; coaches can call forth these strategies when partnering with participants to set a SMART goal, design an incentive, or modify the environment. Participants armed with these strategies can employ them in their subsequent jobs.

HOW TO USE THIS TOOL

This tool lists the twelve Executive Skills addressed in an Executive Skill Approach and suggested strategies for mitigating the challenging effects of weaker Executive Skills. Coaches and participants can refer to the list of suggested strategies when they want to set SMART goals, overcome obstacles to goal progression, implement incentives, or use environmental modifications within your Workforce Development program or your participant's subsequent jobs. Job Developers, who build relationships with employers and place participants in jobs, can also use this tool to help better prepare participants for the responsibilities and tasks of the job. These strategies are suggestions only; in the third column there is space to list additional, creative, or unique strategies specific to your program and the participants you serve.

To understand more about strategies for supporting Executive Skills behaviors, we suggest reviewing Tool #3 - Executive Skills Knowledge first.

COACHING FOR EXECUTIVE SKILLS STRUGGLES IN YOUR WORKFORCE DEVELOPMENT PROGRAM

Strategies for coaches to support Executive Skills struggles can be applied at any point in your Workforce Development program's service delivery flow, though is a prerequisite effective SMART goal setting. As such we encourage you to engage in Executive Skills knowledge work earlier in your program. An example of where you can use these strategies in your Workforce Development Program is below.



For more information about how New Moms uses Executive Skills coaching to support Executive Skills struggles, refer to <u>New Moms' Executive Skills Implementation Case Study</u>.

COACHING AND GOAL STRATEGIES FOR SUPPORTING WEAKER EXECUTIVE SKILLS

The table below helps draw a link between Executive Skills, common resulting behaviors, and strategies to mitigate obstacles in a work-based setting that result from Executive Skill struggles. Coaches can introduce participants to these strategies during SMART goal setting, when thinking about designing incentives, modifying the environment in your Workforce Development program or social enterprise, or once participants are employed externally.

Strategies for supporting obstacles that arise from a struggle with this Executive Skill.	Which strategies might work in your program? Choose one from the suggested strategies or create your own to support this Executive Skill weakness in the participants you serve.
Response Inhibition	
Remove/sequester temptations such as a phoneCreate a cueing system as a reminder to use	
self-controlBuild in routine and automatic "wait time"	
Allow a small reward in exchange for giving up a big one	
Announce your goal in advance to a colleague or supervisor	
Working Memory	
Create a checklistPut visual cues in the environment	
 Have a duplicate set of items/documents (home & work) 	
Use apps/technology (i.e. Evernote, phone reminders, Tile)	
Mentally rehearse what you need to remember	
Emotional Control	
Practice mindfulness meditation	
Use calming and affirmative self-talk	
 Avoid situations that trigger poor emotional control 	
Use a relaxation strategy in the moment	
Rehearse in advance how you will handle an anticipated emotionally-charged situation	
Task Initiation	
Postpone a pleasurable activity until the task is started or done, or even pair the pleasurable activity with starting the task	
Suspend access to distractions, such as a snooze alarm or time limits	
Keep the degree of required effort low (e.g. limit the time spent on the aversive task)	

25

Strategies for supporting obstacles that arise from a struggle with this Executive Skill.	Which strategies might work in your program? Choose one from the suggested strategies or create your own to support this Executive Skill weakness in the participants you serve.
Sustained Attention	
Set a "Personal Best" goal	
 Limit access to distractions (e.g. shut down access to time-wasting websites) 	
Screen out unpredictable distractions (e.g. listen to quiet music on headphones)	
"Temptation bundle": Pair the aversive task with something pleasant or a established habit (e.g. drink hot coffee while entering data)	
Planning/Prioritization	
Use a planning template or calendar	
 Use post-it notes to identify steps that can be easily re-arranged 	
Ask for help from someone who is good at planning and prioritizing	
Practice the skill by starting with something fun to plan (e.g. a lunchtime potluck with colleagues)	
Organization	
Do something fun while you're organizing	
Start VERY small in terms of time, space, or taskWork off a checklist	
Establish/label a set place for items (e.g. your paystub always goes into a specific folder in your desk)	
Trade off with someone who is good at organization	
Time Management	
Make a deal with a colleague that includes a reward for being on time	
Practice time estimation with colleagues—start with small tasks, and then practice larger tasks	
Set your watch ahead to "trick yourself"	
Ask for help—a colleague to cue you or send you a reminder about a deadline	
Use cell phone stopwatches or alarms	

Strategies for supporting obstacles that arise from a struggle with this Executive Skill.	Which strategies might work in your program? Choose one from the suggested strategies or create your own to support this Executive Skill weakness in the participants you serve.
Flexibility	
 Preplan to minimize surprises—and have a back up plan in case something doesn't go to plan Avoid situations that require flexibility Learn to recognize your physiological cues and put in place a default strategy Create an Ifthen plan to rehearse for potential disruptions 	
Metacognition	
 Create a system for analyzing mistakes (ex. monthly reflections with supervisor) Learn to ask for feedback from others, the more immediate the better Use a problem solving template 	
Goal-Directed Persistence	
 Use mental contrasting, implementation intention and process visualization Identify potential roadblocks and systematically eliminate them Build automaticity (do the same thing at the same time every day) Post visual reminders of the goal and why it is important 	
Stress Tolerance	
 Reduce environmental inputs disruptive noise, scents, clutter or go to a different environment all together that does not include the stressful cues Add calming sensory inputs such as peaceful music, a gentle calming scent, touch a soft blanket or pillow Take a break from the situation by doing an activity that requires some attention but is not too difficult or taxing (a puzzle, wash dishes, etc) Tense and relax individual muscles: clench your jaw and release, curl your toes and release, and so forth Repeat a mantra, prayer, meditation or use deep breathing when encountering a stressor 	

EXECUTIVE SKILLS IMPLEMENTATION TOOL #6

Creating Executive Skills-informed Incentives



SUMMARY

Executive Skills-informed incentives are intrinsic or extrinsic motivators that help people overcome obstacles to goal progression, changes in readiness to initiate or pursue a goal, or a shift in the environment. This tool will help you think about the differences between incentives that remove barriers, nudge goal progression, and reward success, in order to design your own Executive Skills-informed incentives. In your Workforce Development program or social enterprise, you may already have monetary (ex. gift cards), tangible (ex. transit assistance) and intangible (ex. public recognition) incentives built into the program. Effective incentives change over time to keep participants engaged, and they are most effective when tailored to the readiness, values, and interests of individuals and groups.

It's important to note that while we use the word "motivation" in this tool we also recognize that motivation is a result of a complex set of factors. We believe job seekers are intrinsically motivated by their personal and professional goals. What might appear to be a lack of or decrease in participant motivation could in fact be related to institutional barriers and structural racism that makes it difficult or impossible to initiate or pursue a goal. Workforce development programs must therefore take into consideration the environmental landscape, and support participant goal progression by working to modify the environment to be more just and inclusive, and to design and provide incentives.

HOW TO USE THIS TOOL

This tool outlines six steps towards aligning incentives between your Workforce Development program goals, participant goals, the environment they both operate in, and the readiness and motivation of your participants. Follow the steps and tasks in order, or simply review the questions to consider as you devise or improve your Executive Skills-informed incentives.

You can also see an example of applying incentives into a Workforce Development program by reviewing New Moms' <u>Learn and Earn example</u> to see how participant and program goals align, and a simple system of incentives is linked to clear milestones and goals.

INCORPORATING INCENTIVES INTO YOUR WORKFORCE DEVELOPMENT PROGRAM

Incentives can be applied at any point in your Workforce Development program's service delivery flow. You can consider the changing institutional barriers, motivations, and successes participants have throughout their engagement with your program. An example of where you can apply the three types of incentives in your Workforce Development Programs is below, starting as participant have their first touch point with your program.



For more information about how New Moms applies incentives in its Workforce Development program please refer to New Moms' Executive Skills Implementation Case Study.

CURRENT GOALS & INCENTIVES

Incentives that are built around participant goals, motivations, values, and common environmental or institutional obstacles are far more likely to achieve their desired impact than incentives built around program goals alone. Use this section to identify your participants' goals and your current incentives.

Step 1: It's all about motivation and goals

TASK:

List below the common goals of your participants, and the challenges they face to achieving their goals.

CONSIDER:

- Which of these goals do participants tend to achieve? Why?
- Which goals are particularly challenging? Why? Which Executive Skills struggles are common in participants? Are your program policies or processes ever the culprit?

COMMON GOALS AND CHALLENGES

Common participant goals
Common challenges to achieving their goals

Step 2: Identify your current incentives across barrier removal, goal progression, and goal achievement

TASK:

Use the **Program Incentives Table** below to outline all the extrinsic ways your program removes barriers, nudges towards goal progression, and celebrates goal attainment.

CONSIDER:

- What tangible incentives, such as transportation assistance, gift cards, and pizza parties, do you offer?
- What intangible incentives, such as referrals, public recognition, rituals or ceremonies, do you offer?

If you do not offer any incentives, consider what barriers inhibit success, what goals your participants are working towards, and how they know they have achieved their goals.

List the ways your program removes barriers to support and stabilize participant's basic needs	List the ways your program offers incentives to build skills and habits, and nudge towards goal progression	List the ways your program rewards and celebrates success and/or goal achievement.

FIND A GOOD FIT BETWEEN PARTICIPANT MOTIVATIONS, THEIR GOALS, AND THE INCENTIVES OFFERED

Incentives are only as good as their alignment with a participant's motivations, goals and environmental context. It's important to find a good fit between the three. The steps below will help you bring into alignment participant motivations, goals, and your incentives.

Step 3: Identify what works, and what doesn't

TASK:

Understand where the program and participant goals and incentives align, and where there are gaps.

CONSIDER:

- What seems to work? Why?
- What doesn't appear to work? Why?
- Do incentives accrue and scaffold throughout the program as participants gain learn skills and achieve more complicated tasks?
- Do you ever use negative or avoidance motivators, like removing access to resources or choices? How does this align with your strengths-based Executive Skills approach? What positive methods could you employ to achieve the same impact?
- Is there a clear connection in the participant perspective between the costs to participant in your program, and the benefit of the incentive you offer?

Step 4: Understand Participant Motivation

TASK:

Everyone is different: motivation, goals, experience with institutional racism, access to resources, values, and Executive Skills strengths and struggles all impact the efficacy of incentives. Ask participants what might motivate them with external incentives so that you ensure you understand individual and common motivations, values, interests, structural barriers and Executive Skills profiles—to help make your incentives more effective.

CONSIDER:

- Are there common barriers, obstacles, motivations, values, and interests in those you serve?
- What common Executive Skills struggles might be mitigated or supported by incentives?
- What resources do your participants value, when? What makes your participants feel respected, proud, strong, and like a leader?
- How might incentives remove barriers to goals? Nudge and participants to progress towards goals when their motivation changes, an unexpected obstacle blocks their path, or their environment changes? How might the promise of a reward move people towards goal achievement?

Step 5: Ensure "Goodness of Fit" between participant motivation, goals, Executive Skills and the incentives you offer.

TASK:

Update your **Program Incentive Table** to bring barrier removal,
nudges for goal progression, and
rewards for success into alignment
with participant motivation. What
incentives strongly align with your
participant motivations, values,
Executive Skills? What do not?

CONSIDER:

- What incentives strongly align with your participant motivations, values, environmental context and access to resources, and Executive Skills?
- What methods on your Incentives Template do not align with your participant motivations?
- What incentives might benefit participants most, from their perspective? What incentives might increase feelings of dignity and empowerment?
- What incentives will be easy for staff to plan, administer, and track? Are there any intangible incentives that you could test quickly?
- How might you involve participants in reviewing your proposed incentives? How can you increase participant choice?

Step 6: Plan your next steps.

TASK:

Devise a pilot plan: resources, time, staff, participants, communication.

For a deeper dive into designing incentives, we recommend reviewing the <u>Incentives Field</u>
<u>Guide</u> by the Center on Budget and Policy Priorities' Building Better Programs initiative.

CONSIDER:

- What resources (money, staff, time) will you need to test incentives? Are there cheap, quick, and easy ways to try something small and build from there?
- What and how will you measure the impact of the incentive?
- How will you collect feedback from participants and coaches?
- How will you build on your learning and expand your incentives testing and implementation?

Sample: New Moms Workforce Development Learn & Earn List for Participants

GOAL SETTING

WEEKLY

Achieve SMART Goal Action Step related to QAP = **\$1**

Quarterly Action Plan
Coaching Attendance = \$1

Bonus Affirmation = \$1

QUARTERLY

Complete CASAS Test = **\$1**

Complete FAFSA application = **\$1**

Vote in an Election (if applicable) = \$1

YOUJOB

WEEKLY

Attend Job Fair/Hiring
Event during the weekend
(provide proof) = \$1

Attend Interview (provide proof) = \$1

Share a Job Lead or Job Posting = **\$1**

ONCE

Employment Verification – initial placement = \$25 gift card/transportation/uniform

30 day pay stub = **\$25 gift card**

90 day employment verification = **\$50 gift card**

6 month employment verification = **\$75 gift card**

1 year employment verification = **\$100 gift card**

FINANCIAL EMPOWERMENT

BI-WEEKLY

Update Budget = \$1

Complete Daily Spending Tracker = **\$1**

Automatic Deposit to Increase Savings Balance by \$20 per month at least 3 months in a row = **\$1**

Update Savings Tracker = **\$1**

ONCE

Open and Fund a New Savings Account = **\$1**

Review Your Credit Report = **\$1**

Review Your Credit Score = **\$1**

New Moms Job Training Dollars are not transferable between weeks or persons. You can Learn & Earn up to \$150, and receive Bonus Pay up to \$275 in gift cards.





Working hard and staying focused on your goals pays off.

EXECUTIVE SKILLS IMPLEMENTATION TOOL #7

Executive Skills-informed Job Development



SUMMARY

Your Workforce Development Program can use an Executive Skills Approach to support participants' professional success in their external employment beyond your program. Anyone working with employment partners—Job Developers, Coaches, and participants themselves—can learn about aligning Executive Skills strengths and struggles to jobs in order to improve job satisfaction and retention. Well-matched employees and employers offers dividends for both: longer job retention, less turnover, higher quality work, faster advancement—and happy employer partners eager to continue working with your program.

HOW TO USE THIS TOOL

This tool suggests questions to ask an employer partner about their company or the job opening to better understand their needs while making a referral for their job opening. If your team cannot talk directly with an employer, you might be able to glean answers from basic company interactions, observation, or even solely a job description. The employer's replies indicate the Executive Skills strengths that might be important for success on the job, and which Executive Skills struggles might inhibit success. Job Developers, coaches, or participants can use their own Executive Skill profile results to determine if the Executive Skills required by the employer match the strengths and struggles of the participant.

Note that this tool is not absolute and does not indicate whether or not any participant or employer will be a good fit as there are many contextual factors in employment success and retention; for example, participants who struggle with an Executive Skill required by an employer may be able to modify their environments or tasks to accomplish the responsibilities of their job and achieve success in the role. It is important to use this tool as a way to generate discussion of the "goodness-of-fit" between participants and the potential job or company, as one of many factors in the job search process.

You can see how New Moms incorporates some environmental and Executive Skills based strategies into its employer outreach by viewing New Moms' <u>Employer Engagement Packet</u> in the next section of this toolkit.

JOB DEVELOPMENT MATCHING IN YOUR WORKFORCE DEVELOPMENT PROGRAM

Job Development matching begins when participants complete their Executive Skills profile, and when you have initial conversations with employer partners about their work environments and workplace systems and requirements. An example of where you can use Job Development Matching in your Workforce Development Program is below, beginning once you have a "job ready" participant seeking employment.



Tool #7: Matching Executive Skills with Job Development

For more information about how New Moms applies Executive Skills-informed strategies to support job development, placement and retention in our Workforce Development program please refer to New Moms' Executive Skill Implementation Case Study.

MATCHING EXECUTIVE SKILLS WITH A JOB

Use this table to understand how Executive Skills might show up in required behaviors or tasks in the workplace. Follow the columns from left to right to ultimately determine if the participant's Executive Skill is a good fit for the job.

First, identifying the Executive Skill in question. Then, ask if the Executive Skill is a strength or struggle for your participant. Next, ask of the employer partner—or glean from what you know of the employer or job itself—the task(s) required of the job. Finally, determine if the skill of the participant is a good fit with the requirement of the employer.

Ultimately, it is up to your staff and participants to determine what a "good fit" means. Many factors help make a good fit between employers and employees; additional environmental considerations are also outlined in the subsequent section.

Is this a Participant ES Strength/ Neither/Struggle	Questions to ask about the job/company?	How well does the job skill match the participant skill?	
Response Inhibitio	n		
□ Strength□ Neither□ Struggle	This job requires the employee to listen and think about facts before saying something or taking action: Always Coccasionally Rarely	□ Very Well Matched□ An OK Match□ Not Well Matched	
Working Memory			
☐ Strength☐ Neither☐ Struggle	This job requires the employee to use their own memory to recall what they did and what they need to do in their job without frequent direction from supervisors: Always Coccasionally Rarely	☐ Very Well Matched☐ An OK Match☐ Not Well Matched	
Emotional Control			
☐ Strength☐ Neither☐ Struggle	This job requires the employee to keep their cool when frustrated or when their feelings are hurt: □ Always □ Occasionally □ Rarely	☐ Very Well Matched☐ An OK Match☐ Not Well Matched☐	
Task Initiation			
☐ Strength☐ Neither☐ Struggle	This job requires the employee to get started on a task—or restarted when interrupted—without delay: □ Always □ Occasionally □ Rarely	☐ Very Well Matched☐ An OK Match☐ Not Well Matched	
Sustained Attention			
□ Strength □ Neither □ Struggle	This job requires the employee to stay focused on one or two tasks at hand instead of juggling between multiple tasks: Always Rarely	☐ Very Well Matched☐ An OK Match☐ Not Well Matched☐	
Planning/Prioritiza	ation		

Is this a Participant ES Strength/ Neither/Struggle	Questions to ask about the job/company?	How well does the job skill match the participant skill?	
□ Strength □ Neither □ Struggle	This job requires the employee to plan out and prioritize their own tasks for their workday: □ Always □ Occasionally □ Rarely	☐ Very Well Matched☐ An OK Match☐ Not Well Matched☐	
Organization			
☐ Strength☐ Neither☐ Struggle	This job requires the employee to organize and maintain tidy workspaces on their own, and know where they put things: □ Always □ Occasionally □ Rarely	☐ Very Well Matched☐ An OK Match☐ Not Well Matched☐	
Time Management			
□ Strength □ Neither □ Struggle	This job includes predetermined tasks with set deadlines that the employee must meet: Always Rarely	☐ Very Well Matched☐ An OK Match☐ Not Well Matched☐	
Flexibility			
□ Strength□ Neither□ Struggle	This job includes changing tasks, work situations, or schedules: Always Coccasionally Rarely	☐ Very Well Matched☐ An OK Match☐ Not Well Matched☐	
Metacognition			
□ Strength □ Neither □ Struggle	This job requires the employee to self-reflect on and adjust their own performance without formal feedback from supervisors: Always Coccasionally Rarely	☐ Very Well Matched☐ An OK Match☐ Not Well Matched☐	
Goal-Directed Persistence			
□ Strength□ Neither□ Struggle	This job requires the employee to stick with and drive towards specific goals even if faced with short-term distractions. □ Always □ Occasionally □ Rarely	☐ Very Well Matched☐ An OK Match☐ Not Well Matched☐	
Stress Tolerance			
☐ Strength ☐ Neither ☐ Struggle	This job includes changing tasks and demands in a high-pressure, fast-paced work environment: Always Coccasionally Rarely	☐ Very Well Matched☐ An OK Match☐ Not Well Matched☐	

GOODNESS-OF-FIT IN THE WORK ENVIRONMENT

Goodness-of-fit is not only about matching Executive Skills strengths and struggles with the requirements of the job. Goodness-of-fit also includes environmental factors, and for some participants a trauma-aware workplace environment will help facilitate their job retention.

Often times a job or workplace can make slight modifications to the environment—physical space, process, policies/procedures, materials, or tasks—to accommodate employees with differing abilities and help promote job retention and low turnover. Employees can also consider how to modify their own environments to help them achieve the responsibilities and goals of their job—see <u>Tool #2 - Environmental Modifications</u>—for more information.

Suggested environmental factors Job Developers and employers can consider when determining goodness-of-fit could include:

Transportation

How might participants access the workplace? Is public transit accessible, and do the public transit hours and schedule match the work schedule? What could alleviate transportation access challenges for your employees?

Uniform

Does the job require a uniform—if so, how many sets of uniforms must an employee have, and who pays for them? Who pays to launder the uniform? Does the uniform accommodate all body and ability types, and accommodate for religious or cultural backgrounds?

Noise

Is the workspace loud or quiet? An open workspace, or individualized work spaces? Are there expected, frequent, loud and/or sudden noises? Are colleagues expected to talk to each other or stay quiet? Can employees use earplugs or headphones?

Physical Activity & Safety

Must employees stand on their feet for a set period of time? Stay seated or sedentary? Is heavy machinery involved, and does the company provide safety equipment? Does the environment meet OSHA requirements? What accommodations are made for pregnant workers?

Scents

Does the workplace have strong or notable odors? How long must employees be in the scented area(s)? What efforts are in place to accommodate those who are sensitive or allergic to certain smells?

Privacy and confidential spaces

Are there gender-neutral bathrooms?
Breastfeeding rooms? A break room or place to sit that is quiet and safe? Do employees have lockers or a safe space to store personal belongings while at the job? Are there video cameras surveilling employees and customers? Are employees required to submit to searches of personal belongings or their articles of clothing?

Sustenance

Are there food options nearby the work place, that are open during the employee's work schedule? Is there a kitchen or break room with a fridge, microwave, and basic kitchen utensils? Are food allergies considered in the workplace (i.e. peanut matter)?

Diversity, Equity, and Inclusion

Does the employer value diversity, equity, and inclusion in its policies, procedures and practices? How does the employer put these values into action?

Sample: New Moms Workforce Development Packet for Employment Partners

New Moms supports young moms with the personal and workforce development tools they need to achieve economic independence and family stability.

Our social enterprise, Bright Endeavors, provides our candidates with paid work experience, and at the end of the program, our candidates have developed the soft and technical skills to be successful in various industries.

Based in Chicago, our staff has the community network, collaborative relationships, experience, and culturally-competent expertise that make us uniquely qualified to provide the assistance area families appreciate.

WORKFORCE DEVELOPMENT

Our workforce development team provides program participants (ages 18-24) with job training skills and experience needed in order to retain quality, permanent employment. This includes:

- Group training to develop professional development and leadership skills
- Paid transitional employment at our social enterprise, Bright Endeavors
- Employment and life coaches to assist with employment acquisition and retention
- Ongoing support for 2+ years after successfully completing our program

SERVICES AND BENEFITS FOR THE EMPLOYER

Partnering with New Moms for hiring needs presents an abundance of services and benefits in which your company can utilize. The workforce development team at New Moms will commit to:

Employment Retention Support	 Email or call us if you notice trends that could prevent the employee from retaining employment with you (ex. transportation, child care, dress code). Assistance in eliminating barriers that interfere with performance.
Accessible Hiring Pool	 New cohorts begin every 6-8 weeks which means we continuously have a candidate pool. Contact us about openings or we can regularly send resumes to you.
Trusted References	 Unlike other programs, each of our candidates practices the skills needed to be successful on the job at our social enterprise, Bright Endeavors. We will only refer candidates that are an ideal fit for your business.
Supportive Services	 Federal tax credits may be available for hiring within certain zip codes. Transportation assistance is provided to participants for two weeks. 100% reimbursement for uniforms that are mandated by the employer.

On-the-Job Training (OJT)	Depending on the size of your business, your organization may be eligible for up to 50% wage reimbursement for OJT.
Increase Civic Engagement	 Our participants strive to become economically independent and better providers for their children. Hiring our participants serves the needs of your business, but also improves the lives of families in the community.

LEVELS OF ENGAGEMENT

There are various ways you can engage with our workforce development program at New Moms. Selecting a level engagement requires no monetary commitment. Choosing a level simply helps our team assess the level of service we should plan to provide and the type of involvement you would like to have with our organization.

Entry Level

- Send us your hiring needs via email or phone
- Interview 1–3 participants/ year

Mid Level

- Interview 2-5 participants/ year
- Guest Tour at New Moms or Bright Endeavors
- Submit feedback on employee progression

Senior Level

- Hire 2+ participants/year
- Quarterly Meetings with the Engagement Specialist
- Host Career Outing or Career Inning
- Letter of support



WE WILL...

- Provide follow up communication with hire at 3, 6, 9, and 12 month retention dates
- List business as a partner on website
- Highlight on social media when a participant is hired



WE WILL...

- Highlight on social media as employer partner
- Visit site to ensure hire's performance expectations are met
- Invite you and a colleague to employer partner celebrations



WE WILL...

- Include your business in New Moms partner marketing materials
- Receive monthly resume packet with potential candidates
- Complimentary ticket to Fall Gala or Spring Kitchen Walk

There's no pressure to solidify the organization level of engagement, but feel free to refer to the graphic above as you continue to explore a potential partnership with the New Moms workforce development program. Our Employer Engagement Specialist can assist your team to determine what is feasible. Our models are customizable to fit the needs of your business.

ABOUT YOUR COMPANY

This form will help us understand how we can best serve you and explore opportunities for our partnership to be successful.

Geographic Information - Location, transportation options, etc.
1.
2.
3.
4.
5.
CANDIDATES
This form will help us understand how we can best serve you and explore opportunities for our partnership to be successful.
What are you looking for in the ideal candidate(s)?
1.
2.
3.
4.
5.
ADDITIONAL NOTES

ABOUT THE POSITION

When answering the following questions, think about the characteristics of the job, policies, supervision, and current or previously successful employees. Your thoughtful and honest answers will help us determine which candidates are a good fit for the position.

1.			
2.			
3.			
4.			
5.			

ENVIRONMENT

- Will the position require an employee to be surrounded by various people, noises, equipment, or scents; or is the work environment relatively quiet?
 - · High sensory environment
 - Relatively quiet, low sensory environment
- 2. Is this a job in which someone needs work and manage their time independently, or one in which they need to accept and follow consistent directions and deadlines?
 - Independently
 - Consistent direction
- 3. Will the position require repetitive tasks or constantly changing tasks?
 - Repetitive tasks
 - Changing tasks

SOCIAL INTERACTION

- 4. Is the role a customer-facing or an internal one?
 - Customer-facing
 - Internal

- 5. How would you describe the way successful employees interact within the work environment?
 - · Chatty and informal
 - · Polite and formal
- 6. Is your work culture around feedback more formal (regular standardized reviews) or informal (conversations as you go)?
 - Formal
 - Informal
- 7. Do you prefer an employee who independently problem solves or communicates with supervisors before making a change?
 - Independent problem solving
 - Communicates with supervisor

SCHEDULING

- 8. How consistent is the work schedule and/or location?
 - Frequently changes
 - · Infrequently changes
- 9. How far in advance do employees receive their schedules?
 - Less than one week
 - More than one week

PARTNER ASSESSMENT

In order to provide you with the best service, once you review, complete, and submit this page we can assess where to begin our partnership together. This form will help us understand how we can best serve you and explore opportunities for our partnership to be successful. Select your desired next step(s). Please allow two business days for us to review and develop the best plan for you and your business needs.

Desired Next Step(s):	Level of service desired at this time:	
☐ Follow Up Meeting With Workforce	☐ Entry Level	
Development Team	☐ Mid-Level	
☐ Tour New Moms	☐ Senior Level	
☐ Host A Career Outing - We come to you!	☐ Need more time to discuss	
☐ Host A Career Inning - You come to us!	Preferred Method of Communication: ☐ Phone	
☐ Send Current Or Upcoming Hiring Needs		
☐ Review Resumes Of Current Cohort		
	□ Email	
	☐ In-person	

Below, please provide us with any additional contacts needed to assist with finalizing our partnership:

NAME & TITLE	EMAIL	PHONE

Please return this form or email your selections to [Job Developer name and email].

Acknowledgments

This Executive Skills Implementation Toolkit was made possible by support from The Annie E. Casey Foundation.



We are grateful for the Executive Skills field-building insights of Allison Gerber of The Annie E. Casey Foundation, Sarah Griffen, Consultant, and Richard Guare, Ph.D.

Valerie Uccellani and Meg Logue of Global Learning Partners created this toolkit's companion <u>Executive Skills Implementation Case Study</u>; we are grateful for their expertise, collaboration, and designing the ES Approach graphic used in this toolkit. Lidia Varesco Racoma did a beautiful job with the graphic design of this toolkit.

This Executive Skills Implementation Toolkit was developed in 2019 by New Moms, including Melanie Garrett, Gabrielle Caverl-McNeal, and Dana Emanuel. New Moms' Workforce Development team contributed to the body of knowledge that led to this toolkit; thank you to Mary Blew, Ashlee Krawczyk, Musa Macenyane, Cathy Robinson-Yates, and Erin Vaughn. Thank you to our social enterprise colleagues at Bright Endeavors.

Thank you to the incredible participants at New Moms. We are so fortunate to partner with and learn from you.

New Moms supports young moms as they pursue their goals of stable housing, quality employment, and family well-being.

To learn more about New Moms, visit www.newmoms.org

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