



Family Economic Mobility Program Planning Tool

The Family Economic Mobility Program Planning Tool helps Head Start parent leaders and staff assess their program’s family economic mobility strategy and professional development needs. Teams may use this tool at any time during the five-year program project period to review the following:

- Program’s current efforts and prioritize opportunities to partner with families
- Program goals and activities with families related to economic mobility
- Opportunities to use existing data about family economic mobility to inform staff training, professional development, and family services
- Common goals that families in your program set for themselves and their children
- Capacity of staff and community partners to support families in reaching their goals
- Areas for additional learning about economic mobility

For a refresher on program planning, see [Foundations for Excellence](#).

The tool aligns with these Head Start Program Performance Standards (HSPPS):

- [Family engagement, 45 CFR §1302.50\(b\)\(3\)](#)
- [Family partnership services, 45 CFR §1302.52\(a\)](#)

Planning Family Economic Mobility Strategy in Five Steps

Follow these five steps to plan your program’s family economic mobility strategy:

1. Review Program Economic Mobility Goals
2. Learn About the Economic Mobility Goals of Families
3. Review What You Learned
4. Decide Your Approach
5. Reflect and Plan

Each step includes a series of questions. Use the downloadable worksheet to record your responses. Every program and setting is different, so apply this tool to your specific needs.

Remember your BROAD goals for the five-year program cycle as you work on the tool. The BROAD acronym stands for:

- Beyond current expectations
- Responsive
- Organization-wide
- Aspirational
- Dynamic

Explore [What Is a Program Goal?](#) to learn more about creating BROAD program goals.

For more information, please contact us: PFCE@ecetta.info | 1-866-763-6481

This resource is supported by the Administration for Children and Families (ACF) of the United States (U.S.) Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$5,700,000 with 100 percent funded by ACF. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement by, ACF/HHS or the U.S. Government.



Review the steps below and reflect on the questions, either individually or as a. You may also wish to use the downloadable worksheet to record answers.

Step 1. Review Program Economic Mobility Goals

- a. Does your Head Start program have any economic mobility-related program goals or objectives? If yes, write them here. If not, skip to question e.
- b. What information about your community and the families you work with led your program to select these goals and objectives?
- c. How did your program engage families and community partners to help set these goals and objectives?
- d. What are your initial ideas if your program does not have family economic mobility-related goals or objectives or if you want to set new goals?
- e. What information do you need from families in your program and community to set new goals or objectives?
- f. How can your program engage families and community partners to help identify and set new goals or objectives?

Step 2. Learn About Families' Economic Mobility Goals

- a. What information do you already have about families' goals for economic mobility? Consider what you know from families' intake, the Family Partnership Process, family and child assessments, conversations with families and staff, and community data.
- a. What information do you need from families to support their economic mobility?
- b. How will you learn from families what they need to support their economic mobility goals or objectives? To identify themes, you may collect information through surveys, existing documents, or conversations with families. You may also collect information during the intake process.

Step 3. Review What You Learned

- a. What goals did families identify?
- b. Is your program already partnering with families toward these goals?
- c. What more could your program do to continue (or start) partnering with families on their goals?
- d. What must staff know to partner effectively with families on these goals?
- e. What training, tools, or resources could help staff increase their knowledge in these areas?
- f. How will you assess the staff's current knowledge and skills before and after training or other professional development?

Step 4. Decide Your Approach

- a. Which organizations is your program currently partnering with to support the economic mobility goals of families in Head Start programs?
- b. As you consider the economic mobility goals set by families and your program, list the organizations you want to partner with to support these goals.

Staff and leadership can use the free online tool from the U.S. Department of Health and Human Services Administration for Children and Families (2015), [Building Financial Capability: A Planning Guide for Integrated Services](#), to decide what financial capability services to offer and how to provide them. You can also use the guide to inform your efforts to:

- Refer families to a community organization or service provider
- Partner with an organization, business, bank or credit union, educational institution, or service provider to jointly provide a service
- Do it yourself and directly provide a service as part of your Head Start program.

Step 5. Reflect and Plan

Reflecting on what you have learned from the previous four steps, record your key takeaways, overall observations, and opportunities for further learning with steps one through four.

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Step	Key Takeaways and Observations	Areas for Further Learning and Exploration
Step 1. Review Program Economic Mobility Goals		
Step 2. Learn About Families' Economic Mobility Goals		
Step 3. Review What You Learned		
Step 4. Decide Your Approach		

Areas for Further Learning and Exploration Action Plan

Review the Areas for Further Learning and Exploration in the previous reflection exercise. Select two or three areas your team wants to prioritize and create your plan using the table below:

Priority Area for Learning and Exploration	Objective(s) for Learning and Exploration	Time Frame/ Resources Needed	Next Steps

Does your team want to develop new five-year goals and objectives or integrate a focus on strengthening family economic mobility into existing five-year goals? If so, write the new goals in the space below.