

The Family Partnership Process: Engaging Families in Economic Mobility Goal-Setting

Helah Robinson: Welcome. Welcome to Day One of the Family Economic Mobility Institute. Thank you so much for joining us, we're so excited that you're here and for us to get started. We're excited to dig into this first session starting at the beginning with goal-setting. Today's session is going to cover using the Family Partnership Process to engage families in economic goal-setting.

Before we get started, I want to make sure that you are able to maximize your experience today. We want to walk you through your session console. At the bottom of your screen, you will see seven engagement tools. I'm going to run through them quickly so that you know what each can do, and so you can use them to facilitate your engagement today. First is the Media Player. You can use this tool to watch the presenters and any videos that are shown during the session throughout the institute. Next is the Questions for Presenters. You can use this tool to share a question or a comment during the session.

Throughout today's session, we're going to be asking you questions for your reflections, for your feedback. Whenever we do that, you can drop your comments into this section for Questions for Presenters. If we refer to it as "the chat," this is what we mean. Next is Slides. Use this tool to display the PowerPoint presentation slides on your screen.

Next is Related Resources and Links. This tool includes a list of resources available for download and helpful links. You can find your slide deck here, all the session handouts that we're going to be reviewing and referencing today. You can find them here and always in the Engagement Hub. Next is the Presenter Bios. If you're curious about us, you can use this tool to learn a little bit more. Finally, the Certificate of Attendance. You use this tool to access your certificate at the end of the session. Remember that you must meet the criteria to earn your certificate.

Remember also that these engagement tools on your console are resizable and movable, so you can customize your console to what works best for you. If you minimize any of these tools, you can always click the icon at the bottom of your screen to make them reappear.

Before we get started, I want to introduce myself quickly. My name is Helah Robinson. I am a Family Economic Mobility Partner with the National Center on Parent, Family, and Community Engagement. I'll let Chandra introduce herself.

Chandra Ewell: Hi. I'm Chandra Ewell. I am a senior program associate for the National Center on Parent, Family, and Community Engagement.

Helah: Thank you so much Chandra. Let's get started. I want to start by just naming what our learning objectives are for today's session. Let's name the three of them for today's session. Today, we want to be able to demonstrate tools to help identify family strengths, priorities, and goals; review tools and resources that program staff and families can use to track progress and

review goals during monthly check-ins; and then finally, examine lessons learned from staff and families about partnering on family economic mobility goals. Let's get started.

We know that a strong and meaningful and authentic relationship between a staff member and the family that you are serving is the cornerstone of an effective family partnership process, and this is ever more important when we're talking about economic mobility and financial goals. Successful partnerships between staff and families require cooperation and open and honest communication, and are even more impactful when they're goal-oriented. These practices will be particularly important when discussing things that can be sensitive or somewhat unclear, like finances, money, and economic goals.

It's important to remember also that it takes time and patience to develop these very strong relationships – they're not done one-off – but that putting in this time is well worth the effort because it can be transformational, the work that we do with families.

One critical way we know that we can build strong relationships is by using relationship-based and strengths-based approaches that identify, celebrate, and draw on the strengths of families. When we talk about operating from a strengths-based way, what we really mean is: Acknowledging the strengths of the family first. That's our first approach, and that's what comes to our mind first when we're talking to families, even in challenging times. Respecting and learning from differences – that families have different experiences, different backgrounds, and cultures that influence what they value and what they want to work toward and contributes to their strengths, and that those might differ from your own.

Showing openness to adapting practices based on families' preferences, and being comfortable and flexible to react and be responsive to families so that we can really meet families where they are, and provide resources and provide support that will work best for families in this moment. Sharing decision-making. Doing so in a very collaborative way and a very transparent way. And, of course, approaching families as equal and reciprocal partners in support of their own progress and support with their children.

Of course, this isn't always easy to do. I wanted to take a step back and hear from you. From your experience, what are some examples of working in a strengths-based way? What does it look like, or what has it looked like for you? Go ahead and think about it, and start dropping some ideas of what's coming up for you into the chat.

From your experience working with families, what can it look like? What does it feel like? What does that mean, this term which can be fairly academic, this term "strengths-based"? What does it actually look like in partnership with families?

I'm seeing some things come through now, so "Making sure families lead the conversation," "Family-driven and the work sits with them or the direction of your conversation and the goals of their setting comes from them." "Asking families open-ended questions to learn more about them. To learn more about their interests, their hopes, their dreams, their passions." "Not asking close-ended questions or positing what we think is right, or what we think is true, or

making assumptions about that.” Why is it important? I’m seeing that “It will lead to stronger, stable, and healthy futures for themselves and their families.” Exactly. As I’m seeing come through, a lot as you named – we can use strengths-based approaches to create these strong, trusting relationships that are the foundation of effective work together.

What we mean by that is we can use strengths-based attitudes, such as recognizing that all families have strengths. That families are the first and most important teachers of their children, and that families are our partners, and they play a critical role both in their own progress and the progress for their families and for their children. That families have the expertise. They know what’s best for themselves, for their families. They know their circumstances better than we ever will. That they are best positioned to make the right choices for their families. The contributions that they have are both important, invaluable, in order for us to work together in a way that is both positive and recognizes family strengths, and is most effective to move forward.

It is also important to remember from previous trainings that, in addition to strengths-based practices, there are also really critical relationship-based practices that we can leverage in order to develop strong relations with families and to really start in a place that sets us both up for success. These can really be around reflecting on a family’s individual and cultural perspective and what they’re bringing. Similar to what you all were sharing in the chat, what this can look like is asking families what they would like to know, and asking permission before sharing advice on any resources, showing that that is the direction that they want to be going, and that it’s actually useful for them in this moment and what’s present for them now.

Also, supporting parental competence, and this is really about leaning into that strengths-based approach of celebrating success, celebrating their progress, and celebrating effort. Even or especially when things don’t work out, recognizing and celebrating the effort that was put in because that shows value and perseverance and resilience, which is a strength and a resource that families have – that we know that families have that help them make progress towards the goals that you’re partnering on with them.

Then value a family’s passion. As you all were saying in the chat, caring and using open-ended questions like what you see on the screen: “I can tell that you certainly want what’s best for Jayda, but then what about you? What are some things that you would like to do?” Partnering with families, and asking them what they would like to see for themselves and their families, because they are the strongest and best position change agents for their families.

With this, and with these reflective practices that are on the screen, I wanted to take a step back again and ask you to reflect on a time when maybe you have used one of these practices with a family. What did you say or do? Or you can think about a time when maybe you could have used one of these to help you build a relationship with a family. What could you have said or done? How could this have helped? Thinking about an actual experience that you’ve had that maybe could have gone better in reflecting on these practices.

I'm seeing "Respecting the family as the expert." I really, really love that – that they have the most nuanced understanding of their circumstances, of their own family's values, and their own family's background. We as family support staff are really partners, being supportive resources and guides to help families name where they want to go and connect them to the resources and the strengths and skills that they need in order to make that progress, but they set the direction and they know where to go – they know where they want to go.

I'm also seeing, "Acknowledge that we all have judgements and biases that bubble up in our brains so that we need to calm those judgements and biases." Just being aware of them is the first step, recognizing that that is present for both us and families that we're working with, and ensuring that if that's present and we're aware of it, it is something that we can check.

Then I'm seeing one last thing: "I had noticed how a parent calmed down their son speaking to him lovingly and softly. It was beautiful to watch. I said, 'I noticed when you spoke to him softly, he just calmed right down.'" That is such an important example of acknowledgment and of elevating something that a parent or a caregiver that we're working with might not notice in the moment or not be very aware of how – what an important step or what an important moment that was of interaction. Honoring that, recognizing that, and calling it out is such an important and critical way to build a relationship that is based on truly seeing families for who they are, genuinely respecting that, and bringing that to the forefront.

As we've been discussing, effectively partnering with families and supporting them in making progress towards greater well-being is really grounded in strong, trusting relationships. This is particularly important when discussing economic and financial goals with families. We can really do this most effectively by leveraging the family partnership process.

As you may recall, the family partnership process consists of six phases and seven important steps for setting and reaching goals with families. Economic mobility goals – like securing employment, building savings, or dealing with debt – can be some of the most challenging family goals to both name and especially to work towards. Today, we're going to review the seven steps and introduce some new helpful techniques and resources that you can use to hopefully effectively set and reach goals like these with families. This kind of support is more important today than ever before. Starting with Step One, setting a goal. Now before you dig into setting a goal, it can be really powerful and empowering to think about the big overall vision of what that goal is ultimately set to achieve.

Let me take a, again, take a step back. I'm going to ask you from a big picture, from your experience or from your perspective, what is a vision? What is an effective vision or what can make it effective? Why start there? Why start with a vision? Again, go ahead and drop it into the questions for presenters or the chat. Another way to maybe think about how to answer this question is, "What is the difference between a vision and a goal from your perspective, and why is that an important distinction?"

Let's see. I'm seeing that "It keeps families connected to their passions and their intrinsic motivations." "A vision is a picture of how things could be in the future. It's helpful for parents

to imagine what they would like to see for themselves and their children in the future.” Now I’m seeing from Melanie, “Imagining a future state of being – imagining a future state of being and a vision for our lives can help us think of smaller goals to help us get to that larger vision.” Spot on. A vision helps us understand what the family wants for themselves. I’m seeing all these things come through the chat, and this is resonating.

Broadly speaking, a vision is a family’s idea of where they want to be in the future. Big picture. It can be really, really powerful to work with families to develop this vision of where they would like to be, and then use that as the foundation to then break down and paint the picture of how more concrete financial and career goals can help them achieve that bigger vision – like painting the picture and showing the logical connection to how concrete goals that we work on with families and that we partner with them towards are steps towards this bigger vision that they have named for themselves.

Starting with a vision is important because it can really help you partner with families to prioritize their interests based on what they are motivated by and by what they value. This work is actually grounded in evidence. Research tells us that effectively making progress and seeing change relies on setting clear goals that are things that you truly care about, are truly deeply connected to your deeply held vision. Research shows that this leads to greater persistence, and greater perseverance and resilience. It also shows that goals are much more likely to be achieved if you have imagined what it would feel like to accomplish them. By starting with a vision, it really helps you and families partner to do just that.

Now also keep in mind that these terms – the terms “vision” or “goal” – may not resonate with all families. You might want to use some other terms that can feel more relatable to the families that you work with. For example, you can talk about a hope or a dream, or start thinking about or envisioning one thing that they would hope to achieve or accomplish or work towards in the future or in the coming months.

Today, we wanted to share a helpful tool, it’s called the Wheel of Life, that you can use to help facilitate a really intentional conversation about vision, and then as the foundation to transition from that vision into more concrete goals, and to ground that in what really motivates a family. You can find this tool in the resources and links section and in the Engagement Hub.

The Wheel of Life helps you focus your conversation on a family’s aspirations and start to identify what goals that they want to focus on in partnership with you. It’s an opportunity for families to think about their lives in a wholistic way. As you can see, this wheel is broken up into different sections or different areas of an individuals’ life, like career and employment, education, finances, your children and family, your family connections and relationships.

It’s an opportunity to think about this in a wholistic way and really facilitate a conversation about how families think about themselves, and how they can think about themselves as key change agents for their families, in addition to the goals that they might have for their children.

This activity off the bat might seem a little hoakie. We've gotten feedback in the past that it feels like or seems like not something that might not be very natural to facilitate. But this activity is actually used in many partnership approaches because it allows people to think through different aspects of their lives – again, if it's finances, career, or basic needs – and have that conversation and do that thinking and assess it in a very structured way – assess in a structured way how they're feeling about each. Then you can use this tool to help guide your conversation with families about what otherwise might be an amorphous, vague, or difficult topics to discuss.

Has anyone ever used a resource like this in the past with families? If you have, what has your experience been? If you haven't, can you see yourself using it? If so, how do you think it might be helpful?

I'm seeing a comment. This might have been a comment to my last question, I'm not sure. It says, the comment from Alejandra says, "It starts with their dreams and their desire to achieve them." I think that probably was in reference to the vision question, but it can relate here, too, in that it really starts with – it starts with their dreams or it starts with how they're feeling about their life right now and what it would take to get them from the middle of the circle out to the exterior.

Another. A little bit more detail might also make it easier to answer this question if you've never used this tool in particular. Let's dig into it a little bit. It might make it a little bit clearer, how it could be useful or how you might be able to see yourself using it.

As you can see, families can assess how self-satisfied they are with each area on the wheel or each area of their life on a scale from one to five. One being in the middle of the circle all the way out to a five. One being dissatisfied, and five being completely satisfied. Then on the tool, there are some instructions and questions that you can ask to help a parent or a caregiver or a family complete the wheel and then use their responses to help dig into a little deeper why they select a two, for example, instead of a four.

For example, some of the prompting questions that are on this resource are things like, "I see that you rated this area pretty highly. What do you do that helps you stay this satisfied in this area?" Another reason why this question is so helpful is because it has you start from a strengths-based way. It starts with strengths. It starts with what a family feels that they have that they can lean on in their current circumstances and in their current context. Those are always things that you can come back to in future conversations as a strength that they can lean on.

Another prompting question is something like, "I see you rated this other area not as highly. What would a '5' look like to you?" This is a really great opportunity to do that and in partnership with families, that visioning. Let's say a family wrote a two in this area, let's say finances or a career. Asking that question of "What does a '5' look like to you?" is a really empowering way to set that vision and to say, "What could it look like, and where do I want to go?" and then a follow-up of "What's getting in the way?" This starts opening up a conversation

of “How can we partner together to get you there? What can we do today to get you to that ‘5’?” Then, “Which of these areas are most important to you?” This comes back to that strengths-based approach of helping families prioritize their interests – what gets them towards that ultimate goal.

I’m seeing now some comments in the chat around how people think about they might be able to use this tool, or what value it may provide, or experience that they have had – and I’m seeing “You need a baseline.” This is a helpful way to start thinking about where a family is now and then really using it as a way to demonstrate what progress could look like and tracking it.

Then I see that “Some families may like working on a worksheet like this together, but others may prefer an out-loud conversation. Individualize for each family.” Absolutely! This resource can help you start that conversation if that’s how families work best and that’s how you work best together. The prompting questions can also help you facilitate an out-loud conversation if that’s what really works better for you and your family and the relationship that you have built.

That’s setting the vision, and setting the vision to help you start to prioritize what goals might you set with a family now that would help them best make progress towards that big vision. Once you’ve done that, you can then move into Steps Two and Three. Steps Two and Three of the goal-setting process focus on identifying skills and assessing a family’s strengths. We’ve talked a lot already about the strengths-based approach and attitudes earlier. Now why – actually, we’ve already talked about why assessing strengths is so important and in particular so important in relationship building and goal setting and goal progress. Another question that I wanted to pose to the group is, “What’s the difference, from your perspective, what’s the difference between skills and strengths? Why might that be important to think about?”

While you guys are thinking about that, I do want to elevate one question that did come into the chat about the Wheel of Life because I think it’s helpful and a useful thing to fly for everyone. The question I see is, “Are there any suggestions for what to do if looking at the whole wheel is overwhelming for a family?” Phenomenal question! I think a really effective approach is to take a step back and say, “We do not have to tackle everything at once, but I am here.”

It’s an opportunity for you to elevate and recognize the support role and the intentional role that you play in a family’s life and why you’re here. Why we are here, and why we are partnering with families in the first place – to be supportive partners in starting to make progress towards any one of these areas. And then saying, “We don’t have to look at or tackle all of them at once. Let’s focus on one.” Maybe even start with one that is higher ranked or a higher number, to really lean into a place where there might be a place of strength that we can start with first.

I’m seeing an answer to the strengths versus – not versus – but strengths and skills. “A parent might have a strength in a certain area but needs to fully develop it to gain the expertise or the skill.” Phenomenal distinction. Strengths are things that you might not be conscious of. You might need someone to point out or to acknowledge out the fact that you have this particular

strength, and honor that and celebrate that. [Inaudible] example that someone gave earlier around how the parent was engaging with her son, her or his son – acknowledging that as a strength. That might be something that no one has ever done before, and that we as partners with families can really do because those are true and deep strengths.

Skills, as many of you have said, skills are specific talents or specific abilities that both the family and staff members have and share within a partnership related to families' goals. They are developed and can be developed over time, which is a very critical component of how we can work with families, engage with them, and talk about skills and skill building – that there is no deficit, there is only opportunity for progress and growth. A skill might be something specific, like using a computer, or something broader, like problem solving or project management. As staff and families, as we build our partnership, we learn about each other's skills and think about how we can bring them together to combine them to support a family in reaching their goals.

Strengths are personal and unique qualities that positively influence our lives, whether consciously or not. Strengths can help us do a lot of things. They can help us make decisions. They can help us adjust to new and changing environments. They help us reach goals. They really help us cope with strain or stress and really create the life that we want. Family members and staff have unique strengths, both individually and collaboratively, as a group and in a partnership. Individual strengths might include things like self-confidence or a positive outlook, and group strengths might be shared beliefs or shared sense of humor that helps you together deal with stress.

It's critical to create time and space to explore families and staff's skills and strengths, because those are critical foundations that you can rely on to help accelerate progress both in good times, but especially so in challenging times when things might not be going as well. Once a family sets a goal, you can then partner with them to break that goal down into smaller steps that they can act on sooner rather than later. This allows families to generate momentum and see progress sooner rather than later, and really makes what can feel like vague or intangible goals feel much more concrete and thus likelier to be accomplished.

The question then is, "But how can you do that?" How can you name those smaller action steps or steps that you can take? How can you help families name them? How can you help families make them more achievable? We can partner with families to co-develop these possible next steps while keeping potential obstacles in mind and proactively planning for ways to overcome them, making them much more likely to be achieved. Let's dig into that a little bit more around examining those potential stressors, exploring those strategies to help overcome them, and then identifying those opportunities or resources of support that you can use to overcome them: Steps Four, Five, and Six.

There's another new tool that we want to introduce that can help you with helpful prompting questions to facilitate this conversation and really dig in and identify these different things in a proactive way when naming and setting goals. As I said, this worksheet has helpful prompts and prompting questions that you can use when discussing what smaller steps to take with families

as they move forward on their goals. It's called the Brainstorming Worksheet, and of course, again, reminder: You can get it in the resource links or in the Engagement Hub.

For example, the tool's prompts and questions include things like, "Brainstorm a list of steps that you would need to take to achieve this goal that we've named together." On the resource itself, it says to start, "Don't worry about the order in which you write them. Once you finish, you can always go back and put them in whatever order." Just saying that, just naming that opens up the freedom and the flexibility of just starting to let your brain go and just name whatever it is that you want or whatever it is that comes to your mind without the constraints or without the stress of feeling like you have to know already, or you have to know what order and logic you're already supposed to be headed towards.

It also includes helpful prompts and spaces for you to actually take notes specifically on what challenges could keep you from achieving your goal. Then, conversely, what strategies could you use to overcome them? Then reflecting on what resources do you already have available to you to help you do that. That's really why it's so important to take the time and space to help unearth what some of those resources and strengths are, to move into this conversation. One really helpful way to do that is this last question of "What has helped you in the past?" Leveraging things that maybe you haven't thought about as a resource or as a strength of "How have you overcome something like this in the past? And can you leverage that again?"

Think about a family that you work with. How might this tool be helpful, or can you even see yourself using it? As you guys think about that, really just think about this Brainstorming Worksheet – I can even go back so you can see it a bit – and the prompting questions that are listed on it in partnership with families.

As you think about what that might look like, I also want to elevate some other comments that came through when talking about strengths and skill building that I wasn't able to get to or came through while I had moved on. In particular, one that really jumps out at me that relates to this especially around step five is that we can help families translate their strengths into tangible skills. Acknowledging and celebrating strengths that families have and how they can leverage those to build skills and thus strategies that they could use to overcome potential obstacles and take steps.

I'm now seeing, "I really like brainstorming, that there are no right or wrong answers, just ideas and then you can narrow it down." Start big picture – start big picture, and then narrow from there. Relieve the stress of having to know already. Also, just a quick reminder, you might already be familiar with this tool. A reminder that these new tools that we introduce today can be used together with the Seven Steps Worksheet from the Family Partnership Process. You can use the Seven Steps Worksheet in partnership with families to walk through the whole goal-setting process, especially phase four, around examining stressors and determining supports. These pieces can all fit together if that's what works best for you and with the families that you're supporting.

Finally, as we discussed a little earlier, goals are most attainable if they are broken down into smaller, manageable steps. Research actually says that that's because inspiring and challenging goals connected to big vision can be overwhelming. That the mind can begin to question even subconsciously how and even whether goals are even possible. The way to combat that feeling of being overwhelmed is to make goals feel like they are within reach, by breaking them down into near-term milestones, finding the next logical step to take, and then assigning deadlines, or assigning a timeline to those tasks.

Research also tells us that actually writing plans down in as much detail as possible – for example, including clear deadlines – makes them more actionable, and thus more likely to be achieved. It also helps you better track progress and celebrate that progress in a very clear and visual way. I want to share a resource that might help you do just that. This resource, called the Goal Action Plan, as you can see in this tool, there is space for a family to actually write down their goal, steps that they plan to take, and by when. Then importantly, there are check boxes to mark off progress as they go.

In our experience, this resource has resonated with parents and families really – really well. In fact, we've had feedback that many families we work with actually take these home and put them up on their fridge or put them up in their house. Because having the visual of where they're headed and having that reminder – that visual reminder of where they're going and then the actual physical ability of being able to check progress and see the progress in front of them as they go has really – really resonated with folks.

This is the most important perspective that we can have – this perspective and feedback from the families that we serve. That's the most important perspective that we can have on the steps and resources that we're sharing. Given that, I'm now going to hand it over to Chandra to share the perspectives for families on relationship building and on goal-setting processes and tools.

Chandra: Thank you, Helah. We will now be looking at parents and staff interactions from central Maine and learning how they work together to have productive relationships. Now let us hear from the Collins family. We asked the Collins family, "What is something your staff member did in the beginning that helped build your trust in your relationship with them?"

"When we first started coming, I was really – really terrified because I've never left him alone with anyone other than family for more than an hour. Then he was coming to the center, and everyone was just so supportive and kind, walked me through what the day would look like and was really helpful. He was in a specific classroom that had just 3-year-olds, and it was an inclusive classroom, which was really cool. And she was really good at making sure I got the information that I needed and getting me involved in things." Rebekah Collins, Mom.

We also asked the Collins family, "If you are off track with your goal, how do you get back on track?" "Take action steps, like breaking goals down because sometimes when you have a goal and you feel off track, it can be really easy to feel like it's impossible to do anything towards it. Having simple action steps." Rebekah Collins.

Aaron Collins, Dad, told us, “I think also when you’re off track, that often can be an opportunity to realign what your goals are. Period. You might notice that things aren’t going exactly the same way and that the needs are different now than where they were before. Often when we discuss getting back on track, we discuss new tactics. We discuss whether or not there needs to be adjustment to the overall plan anyway.”

Now, let’s hear from some of our family support staff. We asked Katie, “How do you establish trust with your families? Think strength-based attitudes and relationship-based practice.” Katie told us, “I feel that the key to successful relationships is trust. Knowing that the parent is an expert on their child and family helps really build that trust. I also feel that relationships with parents is really a partnership. I’m able to come alongside them and be their personal cheerleader as they achieve their life goals. I’m able to truly focus on their journey.” She also shared with us, “You cannot eat an elephant in one bite.” Ever since then, it helped her recognize how to break a large vision down into smaller achievable goals. This truly helps families see their success along their way instead of feeling like their overall vision is unattainable.

Now, let’s hear from another one of our families in central Maine. We asked Allie, “How have you approached reaching some of your economic goals?” “Sitting down and just discussing the steps that I needed to take to get to those goals, I realized how much planning and how many steps I didn’t even know where to start at the beginning – just realizing all the different things that needed to be done to get where I needed to go and outlining those, and being able to see them written down was extremely helpful for me.” Allie Richard. We also asked Allie, “If you are off track with your goal, how do you get back on track?” “It’s easy to forget your goals when you have something big going on. It’s really important to make sure that you take a step back and prioritize what needs to be done, and don’t overwhelm yourself. One step at a time, for sure.”

We also talked to staff, and we asked, “How do you identify areas of strength in your families?” “I look for opportunities to support parental mastery. Allie wrote down two very specific quotes of praise that I stated to her when she accomplished steps towards her goal. That really was very impactful for her.”

How do you help support families in the goal-setting process? Joleen Spencer told us, “After determining what the family’s long-term goal is, we start by identifying one small part of the goal to focus on. The long-term goal feels less daunting and less unattainable when we focus on these small, manageable goals. It’s so exciting and so rewarding to be a part of the family’s journey and their goal accomplishments. We asked another one of our families, “How has your family support person help support you on your journey?” Rosa told us, “Nicole has helped me become more independent, helping me see that I can do this on my own. Helping me grow so that I can be a great mother and use the techniques that she has shared. If she didn’t know the answers, she would find them for me. She has influenced me in so many different ways.”

All right. We are going to turn it back over to Helah for some key takeaways.

Helah: Before we hop into that, I wanted to ask the group what came up for them in hearing that feedback from families that we've served, from family support staff. Did anything resonate with you? Did anything in particular resonate with your experience? Or was anything different from your experience that maybe didn't show up? What's coming up for you when you hear from families themselves of what their experience has been like in working with their family support staff?

Another question that I actually wanted to float to the group was this feedback that we hear from families is really powerful and really helpful, but also it can be important for us to reflect on and to think about what can be challenging in this process. In particular, what can often be challenging when talking about economic goals and finance goals? With that, I wanted to ask, are there any particular questions that people have, or challenges that they've experienced in trying to work on those types of goals in particular?

I'm seeing, "I noticed that providers were using a strengths-based approach from their responses. In the family support staff responses that you were sharing, even in the way that they were talking about the work that they do, using a strengths-based approach."

I'm seeing another person – and Chandra also jump in here if you have some thoughts or are seeing some comments as well – but I see someone commented, "I love the phrase, 'You cannot eat an elephant in one bite.' It is so helpful to break things down into much smaller, more bite-size action steps." I had the same exact reaction, and I think I might steal it as well. You cannot eat an elephant in one bite, and no one is expecting anyone to do so. But I think that sometimes you can feel like people do. It can feel like sometimes people do expect you to eat that elephant in one bite.

Chandra: I'm in 100% agreement. Partnering together, between staff and families, and lots of two-way communication, I think that is huge, and what we just saw in central Maine and knowing that they really are being partners in this in the parent's journey, and not driving them but helping them along the way and helping them come up with their own answers.

Helah: I'm seeing someone say that some families may not feel comfortable opening up about finances. That's absolutely true, and why it can make economic mobility goals and finances goals some of the most difficult to start a conversation about. I'll name a few things. One, that's what makes your role so critical in starting with and building a really trusting relationship. Those conversations might not be the first ones that we have with families. It might come later as we've built a relationship, or we've built trust with families.

If we think back to what we talked about earlier in today's session, that trusting relationships that are built on respect are the most important component to a successful partnership, but that they take time. That is really – really important. It's also really important to recognize that we as family support staff are partners and not experts, and definitely not experts in their lives, recognizing that and acknowledging that in conversations with families to try and relieve some of the pressure on both accounts in talking about making progress towards those goals.

Then the last I'll say is, the first session tomorrow on Day 2 will really talk about having those difficult, sensitive conversations in talking about money and some key strategies and resources that you can use to really facilitate those conversations because they can be challenging. They're really asking both you and the family that you're working with to open up and to come from a place of vulnerability, which can be hard.

Chandra: I'll say one of my favorite comments from the parents of central Maine is, like, sometimes you have to readjust and realign and rethink about your goals, especially in today's climate. Sometimes the goals that you set may not be as relevant because something major has come up. I would say for me, that was one of the strongest comments, was hearing sometimes those high goals need to adjust to what's happening right now.

Helah: Yes, absolutely. Circumstances in peoples' lives change all the time. Even just opinions of the value of the goal that you're working on changes all the time. That's OK. You can pivot, and you can reflect, and you can modify what you're working on with families, depending on what's present for them. Someone just named that "something major can come up, like the pandemic," which changed a whole lot. Part of being in constructive and effective partnerships with families is being responsive, and being responsive to those needs as they change for all of us.

I'm also seeing another comment that, "It is so helpful to hear the impact of effective relationship-based practices. It makes it clear how important it is for us to keep working on our own practice. Also, it was clear that it was because of the relationship between the provider and the parent that they were able to work side by side towards the parent's goals." That, I think, is a really important reflection on what we heard from families about what made their experience working with their family support staff so effective. That, I felt, really came out from the comments that they shared with us.

I'm seeing some other challenges that might come up when talking about economic goals. "Financial success and changes can be outside of the control of an individual. They may apply to a lot of jobs, but it's a competitive market, and there are very few jobs available." Absolutely true. This idea of control can be a really – really difficult one to grapple with, particularly when talking about finances because the example that you shared around applying to jobs is one. Another is, and you might have a job but have unreliable or volatile income coming in, and that can – you can feel out of control. I'll reference again, that a really helpful session to attend will be Session 5, the first session on Day 2, where we really talk about how to navigate that type of conversation and how to navigate that reality, and really having structured conversations with families of, what does feel out of control?

Let's name it. Let's put it out there. Let's talk about it. But then, let's also talk about what feels in control. Let's name it, and let's put it out there, and let's write it down. Let's focus on that to be the starting point for how we can start building more control and taking more ownership and more control of your financial life. Slowly, slowly, as we've been saying all through today's session, taking that big picture, that big goal of financial security or stability, and breaking it

down into smaller pieces that you can take control over to building a stronger financial foundation over time.

I'm seeing ... We'll take maybe a couple more questions, and then we'll move into closing out the session so everyone – you can take a break before the next session and access some of the resources in the Engagement Hub. I see a logistical question: "Where can I find the tools from today's session?" Again, in the Engagement Hub, but also in the helpful Resources and Links tool on your console. You can go there for sure.

I'm just seeing a lot of comments about the importance of partnering together, breaking big goals into smaller steps, and doing so on goals that might seem amorphous, like big financial and economic mobility goals. I feel like that's a good transition for us to move into some of our key takeaways from today. We've covered a lot. I want to pull up on three key takeaways from today's session.

First, that established trust and relationships are the foundation of all conversations with families about goal setting. Second, that goal-setting conversations should be based in family strengths and acknowledgment that they're the drivers in the goal-setting process. Finally, that the goal-setting conversations may seem intimidating to you and to families, and there are tools and resources to help you guide these conversations in a structured and intentional way if that's what works best for you and families that you're working with.

For the question that we just received, so throughout this session we referenced a few resources and in particular the Building Partnerships with Families Series and the Family Partnership Process. Those resources – and we also introduced some new resources and new tools – you can find a resource list and tools in today's session in the Helpful Links section of your console and in the Engagement Hub.

Chandra: To complete this session and download your certificate of attendance, follow these steps: Go to the engagement tools at the bottom of your console, click on the blue Certificate of Attendance icon. A pop-up message will appear on your screen. If you have met the full credit criteria, a certificate icon will appear in the tool window, allowing you to download your certificate. Clicking the icon will open the certificate as a PDF in a new browser tab. You can either save it to your computer or print it. We recommend you save it to your computer.

If you attended this session with several of your colleagues, and all of you have met the full credit criteria, the group leader can add other viewers by opening the Group Viewer Form. Don't forget to download the resources in the Resources and Helpful Links section of your console. The resources are also available on the Engagement Hub. Your feedback is important to us. We have an Event Survey link posted in the Engagement Hub please remember to complete this Event Survey at the end of the institute.

We know how eager you all are to resume full in-person services for children and families. The great news is that the Biden administration has prioritized teachers, early educators, and child care staff to receive the COVID-19 vaccination. To learn more about the vaccine, we have

information available in the Engagement Hub to help you become confident in making the right decision for yourself and your family. Join us in the Engagement Hub for a self-care break and get ready for your next session. Thank you.

Helah: Thank you so much.