# *Trainer's Notes*

# Partnering for Possibility: Whole Family Case Management In W-2

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**Purpose**
Develop Whole Family Case Management and coaching skills to use when working with families in the W-2 program.

**Objectives**
Upon completion of this course, you will be able to:
- Acknowledge the impact of your mindset on the families you serve.
- Describe tools and strategies used to help families reach their outcomes.
- Review how family outcomes inform case management decisions.
- Summarize your role in service coordination in Whole Family Case Management.

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# Table of Contents

## *Materials*

- Computer, LCD projector
- PPT, Clicker
- Class sign-in
- Cardstock for name tents
- Course evaluations
- Tabletop supplies
- White board paddles and dry erase markers (one set for each learner)
- Small white boxes (one for each learner)
- Permanent markers (i.e., Sharpies) for box activities
- Quarter sheet of paper (one for each learner) from Appendix B
- Sticky notes
- Flipchart paper and markers
- Coaching and Values Cards from Appendix A

*Optional*
- Props
- Stickers

## *Trainer Prework*

Two weeks prior to class, review class roster to check for pre-requisite completions. Send a reminder email to learners who have not yet completed all pre-requisites. One week prior to the class, email the State Lead the names of any learners who still have not completed all pre-requisites.

Pre-requisites include:
- Building Stronger Families Together
- Case Management Strategies: Empathy
- Introduction to Collaboration
- Introduction to Motivational Interviewing
- A Trauma Informed Approach to Case Management
- Whole Family Well-Being

## ***Suggested Pace***

This is a 6-hour course. The following agenda is the suggested pace.

| | |
|---|---|
| 9:00 – 9:05 | Introduction |
| 9:05 – 9:20 | Mindset through Beliefs That Changed Icebreaker |
| 9:20 – 9:45 | The Importance of Mindset through Recognizing Mindset |
| 9:45 – 10:10 | Flip the Script through Box 1 |
| 10:10 – 10:30 | Family Center Coaching through Whose Role Is It? |
| *10:30 – 10:45* | *Break* |
| 10:45 – 11:30 | Family Centered Values and Coaching Principles through Box 2 |
| 11:30 – 12:00 | Family Dynamics through Who's in My Family |
| *12:00 – 1:00* | *Lunch* |
| 1:00 – 1:30 | Family Needs Assessment through Wheel of Life Activity |
| 1:30 – 1:50 | Self-Sufficiency Matrix through Self-Sufficiency Matrix Activity |
| 1:50 – 1:55 | Box 3 through Coaching Tools |
| 1:55 – 2:30 | Role of Service Coordination through Box 4 |
| *2:30 – 2:45* | *Break* |
| 2:45 – 3:10 | Referral Process and Making Connections through Referrals and Connections |
| 3:10 – 3:35 | Review Outcomes and Monitor Progress through Plan-Do-Review |
| 3:35 – 3:45 | Revisit Assessment Tools through Reviewing Goal Steps |
| 3:45 – 4:00 | Conclusion |

## Introduction

☼ PPT 1

What does it mean to support the whole family in your work? Today, we're going to explore that together. We'll look at how your mindset shapes the way you connect with parents, practice coaching strategies that empower families to take the lead, and discover tools that help you focus on outcomes that matter most to them.

### *Building the Whole Family Approach Box - Introduction*

☼ PPT 2

**Purpose:** Help learners to reflect on key concepts of Whole Family Case Management.

**Materials:** Small white box (one per learner), extra fine or fine point permanent markers**,** example of completed/assembled box, stickers (optional)

**Estimated length:** 5 minutes

**Directions to Trainer:** This activity is broken into six parts and will take place throughout the course. In each part, learners complete one side of their box, with each side of the box representing a different key concept or takeaway; such as mindset shift, strategy, or guiding principles. By the end of the course, the completed box will be a visual summary of the course and a personal commitment tool for learners. Instruct learners to keep their box unassembled until the end of class.

**Trainer Instructions to Learners:** Throughout today, you each will be completing a box that will represent your key takeaways from today's class. We will give you a prompt and instructions to complete one side at a time. At the end of the day, you can assemble the box and keep it as a personal and professional reminder of the Whole Family Case Management approach.

## Mindset

☼ PPT 3

PG 4

Let's jump right in. Mindset is the foundation of the Whole Family Case Management approach.

## What is Mindset?

When we talk about mindset, we are referring to your personal way of thinking. It's the mental lens you use to see the world, and it directly determines your behaviors, outlook, and how you interpret and respond to the families you work with every day.

You may already be familiar with two key types of mindset: a fixed mindset and a growth mindset. Stanford University psychology professor Carol Dweck came up with these terms. Her research identified two types of mindset. A person with a fixed mindset believes abilities and qualities are unchanging, and a person with a growth mindset embraces the belief that all people can grow and change.

In this work, your mindset influences your tone, your questions, the way you build trust, and how you respond to resistance. It shapes whether you operate from a place of judgement or a place of curiosity. According to Carol Dweck, “Mindsets are just beliefs. They're powerful beliefs, but they're just something in your mind, and you can change your mind.”

Which mindset do you have? Read each statement in your Participant Guide, and circle *agree* if you mostly agree with the statement, or circle *disagree* if you mostly disagree with the statement. We won't be asking you to share your responses.

**Note to Trainer**: Allow learners a couple minutes to read the statements and circle their answers.

Answering Agree to statements 1 and 4 reflect the fixed mindset. Answering Agree to statements 2 and 3 reflect the growth mindset. Which mindset did you agree with more? You can be a mixture, but most people lean toward one or the other.

You might be wondering, what does this have to do with Whole Family Case Management? The answer is: Everything.

In a little while, we'll talk about two specific types of case management mindsets: the fixing mindset vs. the coaching mindset. You'll see how these relate to the fixed mindset and the growth mindset.

As we explore mindset further, think about where you'd like to go, and which mindset will take you there.

## *Beliefs That Changed Icebreaker*

**Purpose:** To recognize that mindset evolves through experience, reflection, and growth, and impacts W-2 workers' approach to working with families.

**Materials:** At least one sticky note and pen for each learner

**Estimated Length:** 7 minutes

**Directions to Trainer:** After providing the initial instructions, give learners a couple minutes to write down their example. If learners want more clarification, explain that the assumption can be about anything related to their work (e.g., a belief about the work they would be doing, the parents with whom they'd be working, who they would be as a Case Manager, etc.). Then, provide the next instructions about discussing with a partner, and give learners a few minutes to discuss. Finally, ask the debrief question to the whole class.

**Trainer Instructions to Learners:** Let's try a quick reflection to bring this to life. Think back to when you first started working in the W-2 program. Write down on a sticky note a belief or assumption you had about the W-2 program that has since changed. Write down something that you are comfortable sharing with another person.

Turn to a person near you and share what you wrote. Then discuss the questions in your Participant Guide with your partner.

**Debrief Question**:
What does this tell us about how beliefs and mindsets evolve over time?

## The Importance of Mindset

☼ PPT 4

PG 5

Let's take this one step further. Your mindset also shapes your attitude, your beliefs, and your values, and vice versa.

Your *attitude* is how you feel about something. It shows up in your tone, body language, and energy.

Your *beliefs* are the ideas you accept as true. They often come from experience and culture.

Your *values* are the deeply held principles that guide your choices and priorities.

You see this play out in your work every day. For example, if you hold the belief that a parent isn't trying hard enough, that belief will influence the way you talk to them, your goals for them, and even how you react when they miss an appointment.

☼ PPT 5

Think of a time when your personal belief or attitude impacted your interaction with a participant. What was the outcome? Was it positive or negative? Share your thoughts with your table group, and designate one person to report out to the larger group.

**Note to Trainer**: Allow learners at least 5 minutes for discussion.

**Ask** Share one insight your group discussed.

## Recognizing Mindset

☼ PPT 6

PG 6

Now let's explore how mindset shows up in practice.

A fixing mindset is similar to a fixed mindset. When we are in a fixing mindset, we assume the role of problem-solver. We tell parents what to do. We take on responsibility for their success. This mindset often comes from a place of urgency, compassion, and desire to help, but it takes away autonomy from the parent.

In contrast, a coaching mindset is similar to a growth mindset. When we are in a coaching mindset, we trust that the parent is capable. We focus on partnership, curiosity, and respect.

One of the biggest mindset shifts Whole Family Case Management asks of us is to move from a fixing mindset to a coaching mindset.

Take a couple minutes to read through the examples of fixing mindset behaviors and coaching mindset behaviors in your Participant Guide. Highlight any behaviors that you do often.

☼ PPT 7

Here are some things you can do to create a coaching mindset environment:

Present skills as *learnable.* "Let's look at how you've built skills in past jobs."

*Value* learning and perseverance, not just talent. "The training class was challenging, but you didn't give up. The fact that you kept showing up and asking questions shows you're building habits that will help you succeed in a job."

Give *feedback* in a way that promotes learning. "It sounds like the interview didn't go the way you hoped. What did you learn from it, and how can we use that to prepare for the next one?"

Be a *resource* for learning. "Can I provide you some additional information on training programs?"

## *Flip the Script*

PPT 8

PG 7

**Purpose:** To practice responding to parents using the coaching mindset instead of the fixing mindset.

**Materials:** Pen and Participant Guide

**Estimated Length:** 20 minutes

**Directions to Trainer:** After pairs have finished writing their statements, ask for volunteers to share with the large group.

**Trainer Instructions to Learners:** It's your chance to flip the script. Read the fixing statements in your Participant Guide and work with a partner to re-write them as coaching responses. Here's an example. Fixing statement: You need to call the daycare today and get on the waiting list. Coaching response: What would it take for you to feel ready to contact the daycare? Would you like help planning that step?

1. You should really follow up with that employer before the end of the week.

   *Potential response: How are you feeling about following up with that employer? What do you think your next step could be?*

2. You have to come to your appointments if you want to stay in the program.

   *Potential response: What would make it easier for you to attend appointments regularly? What's getting in the way right now?*

3. I'll sign you up for the training program. It's your best option.

   *Potential response: What stands out to you about this training program? How does it align with your goals right now?*

4. You need to work on your time management if you want to keep this job.

   *Potential response: What's been working well when it comes to managing your time? Where are you feeling stuck?*

5. Wisconsin Shares will really help you out. I have the website up on my computer. I'll help you fill out the application right now.

   *Potential response: How are you feeling about applying for Wisconsin Shares? What support do you need to move forward?*

6. You need to get your GED before you can do anything else.

   *Potential response: How are you feeling about finishing your GED? Where do you see it fitting into your long-term goals?*

Coaching conversations are not just about asking questions, but also about leaning into curiosity and empathy.

As we wrap up mindset, I want to remind you that we are all in the process of growth. Just like the families you serve, you are navigating your own mindsets, habits, and beliefs. The shift from fixing to coaching is not easy, but it is powerful. The coaching mindset isn't about getting it perfect; it's about getting better.

## *Building the Whole Family Approach Box - Part One: Mindset*

☼ PPT 9

**Purpose:** Help learners to reflect on key concepts of Whole Family Case Management.

**Materials:** Small white box (one per learner), extra fine or fine point permanent markers, example of completed/assembled box, stickers (optional)

**Estimated length:** 5 minutes

**Directions to Trainer:** Tell learners the prompt to complete the first side of the box. Allow 5 minutes for learners to work on their box.

**Trainer Instructions to Learners:** It's time to complete the first side of your Whole Family Approach box. Write or draw 2-3 words or images that reflect the mindset you want to bring to this work. You have five minutes.

## Family Centered Coaching

PPT 10

PG 8

Now that we've focused on how the coaching mindset shapes the way you respond to families, let's take it a step further and see how coaching plays out in practice.

### *Family-Centered Coaching in Practice*

PPT 11

Family-Centered Coaching is future-focused, strengths-based, and parent-led. It's not about fixing problems for families. It's about walking beside them as they explore what's possible and build the life they want for themselves and their children.

Key features of coaching:

- It's a conversation, not just a checklist. You listen, ask powerful questions, and help the parent reflect on what matters most. It's about helping the parent identify what they want for their family's future.
- Focuses on long-term goals, chosen by the parent and based on the family's strengths and priorities.
- Helps the parent build skills, confidence, and a sense of control over their path forward.
- Adapts over time. It doesn't have a fixed end date. It evolves as the family's needs, hopes, and situations change.

For example:
A parent says, "I don't want to just keep surviving every month; I want to be able to save up and not fall behind again." You shift into coaching, and ask, "What would help you feel more in control next month?"

This response opens a door to explore long-term planning around budgeting, employment, or stability based on their vision. That plan then impacts decisions you and the parent make around goals and activities on the Employability Plan and resources and referrals.

PPT 12

The key is knowing when to pause and meet an urgent need, like a housing crisis or domestic violence situation, and when to step back and coach toward the bigger picture. The real power lies in being able to shift your approach, depending on where the family is and what they want from you.

### *Roles in Each Approach*

The heart of Family-Centered Coaching is partnership. You and the parent each have a role to play in this partnership. Let’s explore what those roles look like.

### *Whose Role Is It?*

PPT 13

**Purpose:** To identify the distinct roles of the parent and the coach in Family-Centered Coaching.

**Materials:** White board paddles and markers (one each per learner)

**Estimated length:** 10 minutes

**Directions to Trainer:** Instruct learners to prepare whiteboard paddles. Read each statement, then pause to give learners the chance to indicate whether they think the statement applies to the parent or the coach. Briefly confirm the correct answer and offer a one line explanation to reinforce the concept. Repeat with each statement. After all statements are read, ask the debrief questions.

**Trainer Instructions to Learners:** Each of you have a whiteboard paddle and dry erase marker. Write the word “parent” on one side of the paddle, and the word “coach” on the other side. I will read a series of statements. After each statement, hold up your paddle to indicate whether you think that statement describes the Parent’s role or the Coach’s role.

- Builds a relationship rooted in trust.
    - *Answer: Coach - Trust is the foundation of coaching.*
- Leads the process of setting meaningful goals.
    - *Answer: Parent - The parent is in the driver's seat.*
- Is the expert on the family’s needs and strengths.
    - *Answer: Parent - They know what works for them.*
- Keeps the process transparent and clear.
    - *Answer: Coach - Coaches explain and check for understanding.*

- Decides what success looks like.
  - *Answer: Parent - Success is defined by the family's values.*
- Shapes goals for the whole family.
  - *Answer: Coach - Coaches help clarify and structure family goals.*
- Recognizes needs may differ from family to family.
  - *Answer: Coach - The coach adapts their support accordingly.*

## ☼ PPT 14

**Debrief:**
What did you notice about how the roles differ?
*Possible responses:*

- *The parent is in charge of the direction and the goals, while the coach supports and guides*
- *Coaching is more collaborative, not directive like traditional case management.*
- *The coach creates space for the parent to lead, instead of leading for them.*

How might a coaching approach change the way you show up in your work with families?
*Possible responses:*

- *Focus more on listening and less on problem-solving.*
- *Reminder to slow down and let the parent lead the pace.*
- *Need to resist the urge to fix things quickly and trust their process.*

What might be challenging about stepping out of the 'fix-it' role?
*Possible responses:*

- *It can feel uncomfortable not having all the answers.*
- *Used to being the problem-solver, so it's hard to step back.*
- *Families sometimes expect us to 'have the plan,' and shifting that can be tricky.*
- *It takes more time and patience to coach instead of just telling.*

## ☼ PPT 15

Remember, in coaching, parents are leaders of the process. To help drive this point home for parents, you might say, "You're in charge of the direction; we'll work on how to get there together."

Your role is not to fix, direct, or judge. Instead, you're a partner, guide, and encourager who helps the parent clarify and move toward their vision. To best explain your role to parents, you could say, "I'm here to support your plan, not make one for you."

## Family Centered Values and Coaching Principles

PPT 16

PG 9

There are five core values at the heart of Family Centered Coaching.

1. **Full-Family Focus**: You're not just helping the parent, you're *supporting* the whole family.
2. **Family-Led**: Families *decide* what is most important to them based on their situation.
3. **Respect**: Every family has *knowledge* and *wisdom* based on their life experience.
4. **Strengths-Based**: Every family has *strengths*, even when they're struggling.
5. **Racial Equity and Inclusion**: Recognize that families are affected by things *beyond their control*, like racism, poverty, and unfair systems.

PPT 17

There are also five key principles of Family-Centered Coaching.

1. **Fluid Approach**: Stay *flexible*.
2. **Transparency**: Be *honest* and *clear* about your role, the process, and what support you can offer.
3. **Collaboration**: You don't do things for families; you work *with* them.
4. **Choice**: Offer *options*, not orders.

5. **Responsiveness**: *Meet* families where they are.

Now that you've been introduced to the core values and key principles of Family-Centered Coaching, it's time to take a deeper look.

## *Exploration of Core Coaching Values and Principles*

PPT 18

PG 10

TN Appendix A (pages 39-49)

**Purpose:** To reinforce the key values and principles of Family-Centered Coaching by engaging participants in learning-by-teaching opportunities.

**Materials:** Coaching Values and Principles content cards, flip chart paper, flip chart markers, props?

**Estimated length:** 35 minutes

**Directions to Trainer:** Prior to class, prepare the Coaching Values and Principles content cards (found in the TN Appendix). Divide learners into five groups. Assign each group one value and one principle. Instruct groups to review their cards and come up with a way to explain each concept in their own words. Instruct them to also add one additional coaching phrase or real-life example for each. Each group will prepare a brief (2-3 minute) teaching presentation to share with the full class. They may use the provided flip chart paper, markers, props, or anything else in the classroom to help deliver their message.

**Trainer Instructions to Learners:** In a moment, I will divide you into five groups. Each of your groups will take on two key concepts from Family-Centered Coaching: one value and one principle. Your job is to become the experts and teach the rest of us. Use the cards I give you to review the core concepts of the value and principle you are assigned. Then, find a way to explain them in your own words. You also can share a coaching phrase or example you've used, or might use, with families. Be creative and keep it simple. You can use flip chart paper and markers, props, or anything else in the classroom to help you create your presentation. You'll have 15 minutes to prepare, and then we'll come back together so you can present to the full group.

PG 11

**Debrief Questions:**
- How can these values and principles show up in your work, especially when time is short or families are in crisis?
- What's one coaching phrase or example you heard today that you'd like to try using?

## *Building the Whole Family Approach Box - Part Two: Family Centered Coaching*

PPT 19

**Purpose:** Help learners to reflect on key concepts of Whole Family Case Management.

**Materials:** Small white box (one per learner), extra fine or fine point permanent markers**,** example of completed/assembled box, stickers (optional)

**Estimated length:** 5 minutes

**Directions to Trainer:** Tell learners the prompt to complete the second side of the box. Allow 5 minutes for learners to work on their box.

**Trainer Instructions to Learners:** It's time to complete the second side of your Whole Family Approach box. Which Family-Centered Coaching principle speaks to you the most, and how will you use it?  Write a few words or draw images to answer this question.

## Family Dynamics

PPT 20

The family-centered values and principles we just reviewed help you build relationships with families. To do that, you need to understand the unique dynamics of each family. Look at the statements in your Participant Guide. Circle which one connects with you the most. [Pause to allow learners to complete.]

Each individual determines their own family and family dynamics.

PPT 21

It is critical to know who is in a participant's family and who has influence on each family member. To do this, you need to ask who is in the family. Families can include anyone who plays an important role in their life. It may include more than those members living in the same household.

Participants also may define their family as relatives residing in other locations, friends, and those who provide support and influence to their family. This influence or support may be subtle, like a neighbor who gives the participant a ride to the grocery store on Saturdays. Or, it may be a more influential relationship, like a grandma who raised the participant and now regularly watches the participant's children. There is no right or wrong way to define a family. Who is in the family may change over time.

It's important to make the distinction between who is in the W-2 Assistance Group and who is in the participant's family. The W-2 Assistance Group is important to identify for program policy and eligibility requirements. The participant's family is important to identify for understanding their family's social well-being.

As the parent talks about their family, listen for who provides continual presence and help on a day-to-day basis, such as with child care and transportation, and those who serve more as emotional supports for a parent. Parents need both types of support. This approach provides insight into a parent's support network.

Here are some examples of questions to ask participants to help them determine and define their family:

- Who helps you on a day-to-day basis?
- Who helps you in taking care of your home life?
- Who are you responsible for on a daily or regular basis?

We are going to give you an opportunity to do this first for yourself, and then to review a family diagram from a scenario.

## *Who Is in My Family*

☼ PPT 22

PG 12-13

**Purpose:** Learners practice identifying who is in a family and how they influence family dynamics.

**Materials:** Participant Guide

**Estimated length:** 20 minutes

**Part One:**
**Directions to Trainer:**
Instruct the learners to fill in the diagram of who they determine is part of their family. Ask them to write the name of each person who plays an important role in their family. Give learners 5 minutes to create their diagram.

**Trainer Instructions to Learners:**
Notice in your Participant Guide the "Who Is in My Family" tool. Take five minutes to identify those individuals who you consider play an important role in your family. Draw circles, solid, and dotted lines based on their relationship to you. The instructions for this tool are in your guide.

After you complete this, answer the questions in your Participant Guide with your table group.

**Note to Trainer:** These are the questions in the Participant Guide:
*What did you notice about who you consider part of your family?*
*Did anything surprise you? If yes, what was that?*

**Debrief:**
Let's hear from a few of you. Did anything surprise you, or what stood out to you about this tool?

PG 14-16

**Part Two:**
**Directions to Trainer:** Divide learners into four groups. Learners use the scenario in their Participant Guide to answer questions about the family member's influence on the parent. Learners have 10 minutes to complete the activity. Then debrief as a large group.

**Trainer Instructions to Learners:** Review Jinae's scenario on page 14 and her "Who is in My Family" diagram on page 15 in your Participant Guide. There are additional people with whom Jinae interacts listed on page 16. With your group, review all of Jinae's information and answer the questions related to the scenario on page 16.

**Note to Trainer:** These are the discussion questions in the Participant Guide.
1. *What impact or influence do individuals who Jinae identified as part of her family have on her?*

2. *How might changes to Jinae's family structure (e.g., family members leaving or joining) impact her? Review the additional people who Jinae may include in her family at various times and how each might impact or influence Jinae.*

**Debrief**
How does knowing who is in a participant's family influence your work?
*Possible Responses:*
- *I know who the participant/family may be able to count on.*
- *It may help me identify other supports or resources needed.*
- *Family members may offer encouragement to the family that provides motivation.*
- *It could impact the parent's Employability Plan and how and when activities are assigned*

We are now going to look at family needs assessments and see how family dynamics can have an impact on various areas.

**Family Needs Assessment**

☼ PPT 23

PG 17

In addition to understanding who is in a participant's family, it's also important to know what the family needs to be successful and reach their goals and dreams. At times, that may seem like an intimidating task.

***Informal Assessment Driver Flow***

☼ PPT 24

Think about the information you already collect and document. By completing an informal assessment, you gain a better understanding of the family's current situation.

**Ask** What pages in the WWP Informal Assessment Driver Flow give you a better understanding of the family's situation?
*Possible Responses:*
- *Child and Youth Supports*
- *Family Barriers*
- *NCP*
- *NCP Referral*

**Ask** What information do these pages provide that give you insight into the whole family?
*Possible Responses:*
- *What activities and services the kids are already involved in*
- *Identifies possible supports the kids may need*
- *What other adults or children are in the family, but may not be in the home*
- *Who the other supports are for the parent and kids*

This driver flow is a good starting point for understanding the needs of the family and capturing their current situation. But we know that this is often just the first step. Follow-up questions and additional tools you use can provide you, and the family, with more information to help identify the family's goals, any needed supports, and additional resources.

Let's look at other ways to begin coaching conversations that assist you in better understanding the family. These strategies should open dialogue about strengths, supports, and opportunities rather than feeling like more information to gather.

### *The Wheel of Life*

☼ PPT 25

The Wheel of Life explores the family's overall well-being, assists the family to prioritize areas of life that they want to work on, and helps set initial goals. This tool can help summarize the family's current situation.

As you use the tool, ask the parent, "How satisfied are you with this part of your life?" Tap into your Motivational Interviewing skills and use reflections to identify areas where the parent and their family have strengths and success. Then ask the parent, "What are the 2-3 parts of your Wheel of Life you would like to improve?" There is no right or wrong way for the parent to answer these questions. In fact, their responses may change over time due to changes in their personal and family circumstances. Just like the informal assessment, you can revisit this tool whenever it seems like it would be beneficial to do so.

Use this tool to build a relationship and rapport with the family. It allows you to use a strength-based approach. This fits into the principles of Whole Family Case Management, as it is parent-led and includes the whole family.

Let's look at this tool in action.

### *Wheel of Life Activity*

☼ PPT 26

PG 18

**Purpose:** Learners complete their own Wheel of Life and identify how they can use this with the families they serve.

**Materials:** Wheel of Life in the Participant Guide.

**Estimated length:** 20 minutes

**Directions to Trainer:** Guide learners through the process of completing their own Wheel of Life and answering the self-reflection questions.

**Trainer Instructions to Learners:** In your Participant Guide, you'll find a blank Wheel of Life. We'll review each of the eight areas of well-being that make up your Wheel of Life. As we go through each area, ask yourself "How satisfied am I with this specific area?" After we review the section, you'll have a chance to fill in each wedge of the Wheel to your level of satisfaction on a scale of 1-10, where 1 is very unsatisfied and 10 is very satisfied. We recognize that each individual and family is different. Please complete this in a way that you feel best fits your personal situation.

Let's start with **Health and Well-Being**: This may include things like attending preventive care appointments, getting exercise, eating a nutritious diet, and getting enough sleep. Take a moment to complete this section of your Wheel.

**Child Well-Being and Parenting**: Consider your own children and/or the children in your life with whom you have a relationship. Reflect on your relationship with them, and their overall health. Fill in this section of your Wheel.

**Family, Friends, Relationships**: Think about the amount of quality time you are spending with your loved ones. Do these relationships include open communication, trust, and respect? Complete this portion of your Wheel.

**Basic Needs: Food, Housing, Transportation, Safety**: This can include your ability to access food, the condition of your housing, and the reliability of your mode of transportation. You can complete this section of your Wheel.

**Employment, Education, Career**: This area of life includes things like workload, personal growth and development, and relationships with co-workers, supervisors, or instructors. Take a moment to complete this section of your Wheel.

**Finances:** Consider your spending, savings, budget, and any retirement plans. Complete this section of your Wheel.

**Legal:** This can include things like a criminal record, working with Child Support orders, divorce proceedings, or other involvement with law enforcement or the court system. Go ahead and complete this wedge of the Wheel.

**Other:** You can define this section in whatever way is appropriate for your life situation. Some possible things to consider are recreation (hobbies, vacations, social groups) or personal growth (purpose, values, habits, new skills). You can complete this last section of the Wheel.

## PG 19

Now that you've completed your Wheel, connect the dots. How even or balanced is your wheel? If wheels are unbalanced, or you're short on something, it can be hard to keep moving forward. I'll give you some time for self-reflection to complete the questions on this page. You will not be sharing your answers to these questions.

**Debrief:**

1. What intrigued you the most about this tool?

*Possible responses will vary.*

2. Think back to your "Who is in my Family" tool. How do the individuals in your family influence your Wheel of Life?

*Possible responses will vary.*

3. How might a participant's family members influence their Wheel of Life?

*Possible Responses:*

- *Their family members may be able to offer support that increases a participant's satisfaction with a particular wedge of the Wheel*
- *If the participant does not have a lot of outside family support, they may score a section low*

4. What new ideas has this activity given you about working with the families you serve?

*Possible Responses:*

- *The families I serve are not one-dimensional, but rather are impacted by many areas of their life*
- *This tool can be a good snapshot for areas to focus on with resources or supports*
- *The insights families have after completing this tool could lead to goal development or activity assignment*
- *I will use it to identify community resources with which to connect the family*
- *I can use this as a follow-up to the Informal Assessment to begin a more in-depth conversation with the family*
- *I can use this when we review or update the parent's Employability Plan to help with goal development*

This tool can be helpful when identifying potential goals, activities, or needed resources. Let's say a parent scored low in the Child Well-Being and Parenting section due to feeling unsatisfied with their co-parent. You may consider connecting the parent to parenting classes offered by the UW Extension and add attending those classes to their Employability Plan.

### *Self-Sufficiency Matrix*

☼ PPT 27

PG 20

A self-sufficiency tool or matrix is another way to assist families with identifying their needs. The Arizona Self-Sufficiency Matrix is one of the most popular matrices. The Self-Sufficiency Matrix is an assessment and outcome measurement tool that many states and social service agencies have adopted or modified for use in their own programs. The original matrix from Arizona has over 20 categories of well-being, including food, housing, employment, mental health, and physical health. Families can assess their own situation in each of these categories on a scale from 1 (In Crisis) to 5 (Thriving). A self-sufficiency matrix is designed to be flexible, based on the goals of the program. It can be helpful to start with 5 categories that most impact the parents and children you're serving. Some categories to consider in the world of W-2 are food, housing, employment/income, mental health, and physical health.

The matrix can help you document a family's progress toward self-sufficiency, help parents and families to determine their own areas of strength, and help your agency to assess the effectiveness of services being offered and how best to direct resources to families.

### *Self-Sufficiency Matrix Scenarios*

☼ PPT 28

PG 20-21

**Purpose:** Learners identify ways they can use a Self-Sufficiency Matrix to assist the families they service.

**Materials:** Scenario and completed matrix in the Participant Guide.

**Estimated length:** 15 minutes

**Directions to Trainer:** Review the scenario and matrix with learners. In table groups, learners answer the questions in their Participant Guide. Walk around during the activity to hear what table groups are discussing. There is no large group debrief of the questions learners are responding to. Rather, the debrief asks groups to share one key insight or takeaway.

**Trainer Instructions to Learners:** In your Participant Guide you'll find a brief scenario, Annika's Story, and completed Self-Sufficiency Matrix. With your table group, answer the questions in your Participant Guide. I'll give you eight minutes for that.

**Note to trainer:** The scenario is below:

*Annika is a 26-year-old parent of two children: Kenon, age 5, and Becca, age 1. They recently joined the W-2 program for financial help while Annika looks for work. The family is connected with the Income Maintenance (IM) agency and receives BadgerCare and FoodShare. Annika mentions that they currently are staying with her mother, but cannot stay there too much longer as Annika and her family aren't on the lease. You ask Annika to complete the Self-Sufficiency Matrix to understand her and her family's situation.*

*Food – 3 Safe*
*Housing – 2 Vulnerable*
*Employment/Income – 2 Vulnerable*
*Mental Health – 3 Safe*
*Physical Health – 5 Thriving*

**Note to Trainer:** These are the questions in the Participant Guide.

1. What does this information tell you about Annika's areas of strength? Where might she need support?

*Possible Responses:*

- *Housing and employment appear to be two areas of concern*
- *Annika's strengths seem to be her health and being connected to FoodShare. She is also resilient and able to seek support.*

2. How might you use this information?

*Possible Responses:*

- *Begin the conversation on her career goals*
- *Ask Annika what she feels is more important to address first*
- *Prioritize my case management or coaching steps or actions*

3. What are possible next steps?

*Possible Responses:*

- *Set up a time for Annika to complete a Career Assessment*
- *Connect Annika to the Cap agency, or other community resources, for help with housing assistance*

**Debrief:**

Share one key takeaway or insight your group discussed.

## ☼ PPT 29

The Wheel of Life and the Self-Sufficiency Matrix are tools you can use at any time to help a family determine their goals and identify their priorities. In turn, you can then use that information to work with the parent to develop their Employability Plan, make appropriate referrals, or frame a conversation during a staffing meeting with other partners. It can be helpful to revisit these tools and see how a parent's self-assessment changes over time.

## *Building the Whole Family Approach Box - Part Three: Helping Families Reach Their Goals*

PPT 30

**Purpose:** Help learners to reflect on key concepts of Whole Family Case Management.

**Materials:** Small white box (one per learner), extra fine or fine point permanent markers**,** example of completed/assembled box, stickers (optional)

**Estimated length:** 5 minutes

**Directions to Trainer:** Tell learners the prompt to complete the third side of the box. Allow 5 minutes for learners to work on their box.

**Trainer Instructions to Learners:** It's time to complete the third side of your Whole Family Approach box. Why do family goals matter more than just compliance or checklists? Write a few words or draw images to answer this question.

## Coaching Tools

PPT 31

PG 34-36 (Appendix A)

We've covered multiple tools you can use when working with families. In the Appendix of your Participant Guide, we're including some bonus tools you can use in your coaching toolbelt.

First is the **Ready to Coach Checklist**. This tool is a great self-assessment to help get you physically and mentally ready for your coaching session. It prepares you to be fully present to the family in front of you.

**Everyday Strategies for Working with Families** is a resource of things you can do to help reduce the impact of stress and trauma experienced by families. It's a checklist of 10 steps you can take during a meeting with a family.

Finally, **Family Focused Powerful Questions** helps you assess where families are in their readiness for change. These questions can enhance your conversation with the family and coach them on having conversations with others.

## Role of Service Coordination

PPT 32

PG 22

The tools we covered help identify the supports and services that can benefit the families you serve. Let’s talk about how you connect families to those services.

You may find it helpful to use an analogy to understand the importance of service coordination in the Whole Family Approach.

Service coordination is like a family taking a road trip in their own car. The family is in the driver’s seat. They decide where they want to go and what success looks like. The W-2 agency services are one set of tires, providing traction, support, and stability in key areas like employment, training, and support services. Community resources are the other set of tires, offering support in housing, healthcare, childcare, and more. The coach is the GPS system; offering directions, providing route options, alerting them to roadblocks, and recalculating when needed.

The car moves forward smoothly only when all four tires (W-2 and community supports) are aligned and working together. The family is in control of the wheel, deciding where they want to go. The coach, as GPS, helps the family get to their destination. Not every family needs a GPS all the time, but having one can help navigate areas that are new or unfamiliar.

Just like every GPS route has a starting point, so too does service coordination. It begins with assessment.

### Service Coordination and Assessment

PG 23

The services you coordinate for families must be based on what you’ve learned during assessment, not on assumptions or a one-size-fits-all checklist. During New Worker Training, you learned that assessment is an ongoing process. One of the purposes of assessment is to uncover both challenges and strengths across multiple areas, such as education, employment, health, housing, and relationships, not only for the parent, but also for the whole family unit.

Each service you coordinate should be tied to a need, barrier, or strength that came from an assessment conversation. To truly follow a family-centered path, you align support to what matters most to the family.

**Ask** When you complete an assessment, how do you decide which services or referrals to focus on first?
*Possible Responses: I base it on what the family prioritizes, I ask about the family's readiness, I look at the family's self-reported crisis levels, I look at which needs align with the parent's goals*

Service coordination is not about doing things for the parent; it's about partnering with them to build a plan that fits with their vision.

**Transfer of Accountability**

☼ PPT 33

As families begin to move out of crisis and into stability, your role as the W-2 worker also needs to shift. Early on, you may need to take a more active or direct role if the family is overwhelmed, in crisis, or simply trying to meet their needs. As stability increases, accountability and ownership of the next steps should gradually shift back to the parent. Even though this may not be easy for you or the parent, it is a vital step in empowering families to become self-sufficient.

***Not a Linear Process***

☼ PPT 34

Remember that the shift of accountability from the W-2 worker to the parent is not a linear process. A family might move from crisis to stability in one area, like housing, but still be in survival mode when it comes to childcare or mental health. Progress is not a straight line. People go back and forth between needing support and managing on their own. It's your responsibility to walk alongside them and support their forward movement, not to judge their pace or the path.

☼ PPT 35

Here are some signs that a family may be ready for more ownership over a particular goal.

- They are *following through* on small tasks.
- They are showing more *confidence*.
- They are naming their own *next steps*.
- They are expressing *less dependence* on reminders or direction.

## *Levels of Support*

☼ PPT 36

PG 24

**Purpose:** To recognize how a family's level of stability, readiness, and confidence can influence the amount and type of support a W-2 worker provides.

**Materials:** Pen and Participant Guide

**Estimated Length:** 20 minutes

**Directions to Trainer:** Allow up to 10 minutes for tables to discuss the scenarios. Ask at least one volunteer to report out on each scenario. Focus the debrief on the 'why' rather than the level of support the group selected. Be prepared for the possibility that groups may disagree. There can be multiple right answers, as long as they provide reasonable rationale for their decisions.

**Suggested Modifications:** Have three signs, each with one of the following labels, High, Medium, Low, arranged around the room. Learners work independently to review each scenario and determine the level of support they would provide. There can be multiple right answers, as long as they provide reasonable rationale for their decisions. After a few minutes read the first scenario and ask learners to stand by the sign with the level of support they would provide. Groups then share with each other why they chose that level of support. Ask one person from each group to report out. Repeat the process for the other two scenarios.

**Trainer Instructions to Learners:** Each goal on which a family is working may require a different level of support and accountability. This is a dynamic coaching relationship where sometimes you are guiding, sometimes you are listening, and sometimes you are challenging. With your table group, read the scenarios in your Participant Guide. Determine what level of support you would offer in each situation, High, Medium, or Low, and Why? Designate someone in your group to be the scribe and reporter.

*Scenario 1: A parent just secured housing after a period of homelessness. They are not sure how to set up utilities or arrange renter's insurance.*

*Possible Responses: Likely high support level*
*Reasoning:*
- *I would offer high support here because they are transitioning out of crisis. It's a critical moment where they may feel overwhelmed and unfamiliar with the process.*
- *Even though they've secured housing, the next steps involve navigating systems with which they may not have experience. I'd walk through the steps and maybe even make a few calls together.*
- *This is a big stability gain, and we want to protect it. Helping them complete those immediate next steps ensures the housing is actually livable and sustainable.*

*Scenario 2: A parent applied for three jobs this week, followed up on one of them, and now has an interview scheduled for next week.*

*Possible Responses: Likely low to medium support level*
*Reasoning:*
- *I'd move to more of a coaching role here. They're showing initiative and follow-through, which tells me they're ready to take the lead.*
- *They're in action mode. I might just check in with a reflective question like, "How are you feeling about the upcoming interview?" to gauge their readiness and keep the momentum going.*
- *Medium support might be appropriate if they're nervous or it's their first interview in a while.*

*Scenario 3: A parent wants to enroll their child in Head Start, but they are confused by the application process.*

*Possible Responses: Likely medium support level*
*Reasoning:*
- *It could be helpful to walk through the process together the first time, then check in after they try it on their own.*
- *This could be a great coaching moment. I'd ask, "What's the first step you think you could take?" and then support them as needed.*
- *Because they've named the goal, but aren't confident in the process, this is a chance to build their skills without taking over.*

**Debrief Questions:**
What's the risk of staying too involved for too long?

*Possible Responses: The parent may become dependent on you to do things for them, which prevents the family from building confidence and skills. They might see us as the fixer instead of trusting their own problem-solving abilities*

What's the risk of stepping away too soon before the parent is ready?

*Possible Responses: They might get stuck or overwhelmed and just shut down. You could miss a critical support opportunity, especially during transition periods. It may feel like abandonment if you're still early in building trust in the relationship*

As W-2 workers, your role in coordinating services is critical, but even more important is knowing how to do it in a way that empowers families. That means tying services to real needs, based on assessment. It also means adapting your role as families grow, and offering the right level of support for each unique situation.

## *Building the Whole Family Approach Box - Part Four: My Role in Whole Family Case Management*

☼ PPT 37

**Purpose:** Help learners to reflect on key concepts of Whole Family Case Management.

**Materials:** Small white box (one per learner), extra fine or fine point permanent markers**,** example of completed/assembled box, stickers (optional)

**Estimated length:** 5 minutes

**Directions to Trainer:** Tell learners the prompt to complete the fourth side of the box. Allow 5 minutes for learners to work on their box.

**Trainer Instructions to Learners:** It's time to complete the fourth side of your Whole Family Approach box. How do you describe your role when supporting families as a whole?  Write a few words or draw images to answer this question.

## Referral Process and Making Connections

☼ PPT 38

PG 25

A component of offering the right level of support is knowing your community resources and partners.

**Ask** What are some of the community focused organizations in your service area? *Possible responses: Community Foundation; Big Brothers/Big Sisters; United Way; NewCap; etc.*

W-2 has always been a program that was made stronger through collaboration with community partnerships.

Think back to the webinar, Building Stronger Families Together: Whole Family Case Management, when we talked about Key Services and Supports. Take a moment, and in your Participant Guide, review the key supports on the left side of the page. Then match them to their summary on the right side of the page.

**Note to Trainer:**
The correct matches are:
1 G; 2 F; 3 E; 4 D; 5 C; 6 B; 7 A

PG 26

In this webinar, we also challenged you to identify or develop resources to meet the many needs of parents on your caseload. We have included that simple chart in your Participant Guide for your reference. Review the needs on the list and add any that you can think of beyond what we have listed.

After you attended the Building Stronger Families Together: Whole Family Case Management webinar, did you take a little time to identify or develop resources in your community? Think to yourself, have you done this? If not, why not? What is getting in the way?

**Note to Trainer:** This is a self-reflection question; don't solicit responses. After a minute or so, move on to the activity.

## *Activity: Referrals and Connections*

PG 27

**Purpose:** To understand the need to be knowledgeable about resources and parents' access to this information.

**Materials:** Pen and Participant Guide

**Estimated Length:** 20 minutes

**Directions to Trainer:** Begin by asking the learners to respond independently to the questions in the Participant Guide. Give them 4 minutes to write down their answers.

Then ask them to pair up and discuss only the first two questions. Give them 3-4 minutes to discuss in pairs.

Finally, ask each pair to join another pair. Give them 4 minutes to share and discuss question numbers three and four.

**Trainer Instructions to Learners:** Take the next 4 minutes to answer the questions based on your own experiences in your Participant Guide.

Next, pair up with someone at another table or that you don't know to share and discuss your responses to only the first and second questions. Identify similarities and differences or ideas that interest you and that you would like to know more about. You will have 4 minutes to discuss.
**Note to Trainer:** The questions in the PG are below:

1. *How do W-2 workers learn about other community programs, agencies, and processes? This includes referrals, applications, ongoing services, and ending services.*
2. *How do you share this information with parents? Is it a once and done, or do you revisit it? Do you follow up?*

Now, find another pair to create a group of four and discuss questions three and four. You will have about 4 minutes to discuss.
**Note to Trainer:** The questions in the PG are below:

3. *How does, or how could your W-2 agency create opportunities for parents to access/ find out about resources?*
4. *Are there other agencies in your community that take the lead on getting information about resources out to families?*

**Debrief**
Now let's have a couple of you share opportunities you discovered that were new to you.

## Review Outcomes and Monitor Progress

PPT 39

PG 28

We've spent a lot of time today discussing Whole Family Case Management. We've looked at how mindset impacts our ability to connect with families, how coaching provides the family with support to make decisions for themselves, and how your role in service coordination impacts the services the family receives.

Thorough documentation helps you be effective with this approach. Review how things are working for the family. There are a few ways to do that. You can:

- *revisit* assessments to see how the family's situation has changed and what progress they have made,
- *document* the outcomes of referrals and their effectiveness, and
- *review* the parents' goals on the Employability Plan and update accordingly.

You want to be purposeful and have a plan for how to review and reassess a family's situation and needs.

### *Plan-Do-Review*

PPT 40

PG 29-30

**Purpose:** Learners use their own Wheel of Life to create an action plan for review.

**Materials:** Plan-Do-Review Tool

**Estimated length:** 20 minutes

**Directions to Trainer:** Guide learners through the process of completing the Plan-Do-Review tool. Provide learners with 6 minutes for Part 1 and 6 minutes for Part 2.

**Trainer Instructions to Learners:**
**Part 1:** Let's put into practice a plan that can prepare you to follow-through, monitor, and review goals you've put into place.

## PG 18

First, turn back to your own Wheel of Life that you completed earlier. Think about one area that leads you to a clear goal or process for success. What's one priority you identified for yourself? Start brainstorming ways you may be able to achieve this goal.

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

## PG 29

Complete the first page of the Plan-Do-Review tool, identifying one goal to work on and the steps you can take to reach that goal. Be specific. You may want to think back to what you know about SMART goals.

## PG 30

**Part 2:** Now, I want you to pick just one step you identified to start with. What's your plan for completing this step? Think about:

- What actions will you take?
- What role will family members play?
- Who will do it (include family members)?
- When will you do it?
- Where will you do it?

This is an opportunity to look at your Who Is in my Family chart. Who is going to help you with this?

This is where we'll stop for now. Next comes the Do part, which is actually following through on the plan. Then, there is time for Review. Notice in that section, there is an opportunity to think about if something needs to change. Again, families always change; situations change; and revisiting that situation, and reassessing, can help determine if goals and plans need to change.

**Debrief:**

1. What was this experience like for you?

*Possible Responses will vary.*

2. What does this tell you about the importance of having a plan of action and following through on that plan?

*Possible Responses:*

- *When you write down a goal and really think through how you are going to achieve it, you're more likely to complete that goal.*
- *Having a support system, no matter who or what that looks like, can help people achieve their goals.*
- *Having a plan holds people accountable.*

3. How might you apply this idea or tool with families?

*Possible Responses:*

- *Depending on the goal, this tool could help identify Goal Steps on the Employability Plan.*
- *I could use this as a conversation starter when I meet with the family to see how things are going and what progress has been made.*
- *I can use this to plan when I next need to follow-up with a family.*

If you were working on this with a family, your role would be to guide them through this process, help them brainstorm possibilities, and then follow up on any role you may be playing in this, such as providing resources or helping make connections. As you meet to review the plan with the family, you can discuss what's worked and what's not worked.

- How did it go? Did things happen according to the plan?
- How did the plan affect the family? Did you miss any steps?
- Did things happen on time? If the parent achieved the plan, then celebrate that and continue with the next step of the plan, making adjustments as needed.
- If the parent did not achieve the plan, what needs to change? What support might the family need?
- What support or resources can you, as the coach, provide?

Having an action plan in place gives you and the family a starting point for revisiting their current situation, monitoring outcomes, and documenting their progress.

## Revisit Assessment Tools

PPT 41

PG 31

Families are always changing. It's important to regularly check in and reassess how things are going. This helps you understand where the family is currently, whether the support and services are helping, and if they are making progress or facing new challenges.

Plan to review past assessments with the family. Think about how often you need to revisit each type of assessment. Some assessments, like the Informal Assessment driver flow, have policies that say when you must complete them. Other assessments, like the Wheel of Life, have no policy tied to them, but it can be helpful to revisit those tools every 90 days. Remember, assessments are not a one-time thing. As families grow and change, their assessment results may too.

Whatever plan you make, be sure you follow through.

## Documenting Outcomes

Revisiting assessments helps with documenting outcomes and progress. New, or additional, assessment information can identify progress the family is making. For example, perhaps the family has moved up in a category on their Wheel of Life, or now are scoring themselves higher in an area on their Self-Sufficiency Matrix. Perhaps the parent attended those parenting classes through the UW Extension that we mentioned earlier. Now they feel they have strategies on how to be a more effective co-parent and are better equipped to handle different situations that come up with their co-parent. Documenting this progress tells you, and the family, what is working well for them. Celebrate those successes and achievements with the family and assist the family in identifying the next step or goal to work on.

New assessment information also can show what is not working for a family. If the family is not making progress, or they experience regression, that's ok. In fact, it's pretty common. Families rarely make progress in a straight line. What looks like a step backward is an opportunity for the family to rethink their goals and how they want to reach them. Documenting this and any changes the family made provides you with the information you need to continue coaching the family forward.

## Reviewing Goal Steps on the Employability Plan

Documentation is always critical in the work we do to keep track of a case or the life of a family in W-2.

Goals and goal steps are tools in the Employability Plan that you can use to document, review, and track outcomes that are based on areas in the Self-Sufficiency Matrix. Keeping track of the progress in the areas that the parents choose to work on can help to engage and motivate them to keep moving forward.

Remember that you can update, modify, and rewrite goals at any time based on the needs and interests of the parent. These are not a one-time thing.

### *Building the Whole Family Approach Box - Part Five: Focusing on Family Outcomes*

☼ PPT 42

**Purpose:** Help learners to reflect on key concepts of Whole Family Case Management.

**Materials:** Small white box (one per learner), extra fine or fine point permanent markers**,** example of completed/assembled box, stickers (optional)

**Estimated length:** 5 minutes

**Directions to Trainer:** Tell learners the prompt to complete the fifth side of the box. Allow 5 minutes for learners to work on their box.

**Trainer Instructions to Learners:** It's time to complete the fifth side of your Whole Family Approach box. What is one tool or technique you'll use to support families in achieving their own outcomes? Write a few words or draw images to answer this question.

## Conclusion

We've covered a lot; mindset, coaching, service coordination, and the tools that help us partner with families in meaningful ways.

As you head back to your work, remember: what matters most is showing up as a partner, listening with empathy, and trusting families to lead their own journey. I encourage you to take at least one idea or tool from today and try it out this week. Small shifts in how you show up can make a big difference for families. You are the guide and partner who helps open doors to possibility.

### *Building the Whole Family Approach Box - Part Six: My Commitment to Action and Box Wrap-up*

☼ PPT 43

**Purpose:** Help learners to reflect on key concepts of Whole Family Case Management.

**Materials:** Small white box (one per learner), extra fine or fine point permanent markers**,** example of completed/assembled box, stickers (optional), quarter sheet of paper (one per learner).

**Estimated length:** 15 minutes

**Directions to Trainer:** Tell learners the prompt to complete. Allow 10 minutes for learners to write their response on paper and assemble the box. Then, in table groups, learners share one or two sides of the box that are most important to them. Invite a few volunteers to share takeaways with the whole group.

**Trainer Instructions to Learners:** It's time to complete your Whole Family Approach box. What is one thing you'll do differently based on what you've learned? Write a few words or draw images to answer this question on the sheet of paper. Then assemble your box and put your response inside.

After you've assembled your box, share with your table group one or two sides of your box that are most important to you.

**Debrief:**
Let's hear from a few of you. **Ask** What is one takeaway you have from today?

Thank you for all the energy and reflection you brought today. Real impact begins when you believe in the potential of families to lead their own journeys and walk beside them every step of the way.

## References

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*Tools.* (n.d.). Family Centered Coaching. https://familycenteredcoaching.org/tools/

# TN Appendix A – Coaching Values and Principles

# Full-Family Focus

You're not just helping the parent; you're supporting the whole family. That might include kids, grandparents, partners, or others the parent sees as family. Families change over time, so it's important to check in often. You might ask:

- Who's in your corner right now?
- Is there anyone else you want to include in your plan?

# Family-Led

Families decide what is most important to them based on their situation. They choose what goals matter most and how they want to get there. Your role is to listen, support, and encourage them to take the lead. For example, you could say:

- You set the direction—I'm here to walk with you.
- What's important to you right now?

# Respect

Every family has knowledge and wisdom based on their life experience. Respect means you see them as experts in their own lives. You don't judge their past or make assumptions. Instead, you listen, honor their wisdom, and make sure they feel seen and valued. Respect is how trust begins. You can show respect by saying things like:

- You've already done a lot to get this far.
- Thanks for sharing that—it helps me understand what matters to you.

# Strengths-Based

Every family has strengths, even when they're struggling. Look for what's working, not just what's broken. Help families see the skills, resilience, and support systems they already have, and build on those. To highlight strengths, you might say:

- You're great at showing up, even when things are hard. That's a strength.
- Let's use what's already working to help with what's not.

# Racial Equity and Inclusion

Recognize that families are affected by things beyond their control, like racism, poverty, and unfair systems. Take time to understand how these systems shape the family’s reality and your own role within them. Think about the impact on the families you work with. To acknowledge this, you could say:

- This challenge isn’t just personal; it’s part of a larger system, and I see that.
- Let’s make sure the resources we talk about work for you and your community.

# Fluid Approach

Stay flexible. Families may have urgent needs one day and be ready to focus on long-term goals the next. Their priorities can change quickly. Adjust your approach based on their readiness and focus for that moment, even if it shifts during an appointment. You can support this flexibility by saying:

- Do you want to focus on today's challenges, or look ahead?
- We can switch gears if something more urgent has come up.

# Transparency

Be honest and clear about your role, the process, and what support you can offer. Help the participant understand whether you're coaching, task managing, or connecting them to resources. Check in often to find out what's working. Try using phrases like:

- Sometimes I'm a coach; sometimes I'm here to help with tasks. What do you need today?
- Here's what I can do. Want to talk through how that fits your goals?

# Collaboration

You don’t do things for families; you work with them. You bring tools and resources; they bring their lived experience and insight. Together, you create a shared plan and make decisions as partners. You might say:

- Let’s figure this out together.
- If something we try doesn’t work, we’ll regroup and adjust together.

# Choice

Offer options, not orders. Families choose the level and type of support that works for them. Your role is to respect those choices, follow their lead, and support their decisions, even if their path is different from what you expected. Support choice by saying:

- Here are a few ways we can go; what feels right for you?
- You get to decide how much support you want and when.

# Responsiveness

Meet families where they are. Stay tuned in to their current reality, their energy, and their priorities. Adjust your approach and recognize that success looks different for every family. You can show responsiveness by asking:

- Has anything changed for you or your family since we last talked?
- What does success look like for you right now?

# TN Appendix B – Building the Whole Family Approach Box - Part Six: My Commitment to Action

One thing I will do differently is...

One thing I will do differently is...

One thing I will do differently is...

One thing I will do differently is...