

Training Guide: Writing Effective Goals with Participants

For PRSS and CHW Staff | Life Changes, Inc.

Purpose of the Worksheet

The **Monthly Goals Worksheet & Progress** helps participants:

- Set **clear, achievable goals**
 - Take **incremental action**
 - Track **progress monthly**
 - Stay accountable with **support staff**
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Components of the Worksheet

Each worksheet includes four core goal areas:

1. **Housing**
2. **Income/Employment/Education**
3. **Recovery Pathway**
4. **Personal Goal**

Each goal must have:

- A clear **goal statement**
 - A realistic **action step**
 - A **target date**
 - A **progress rating**
0 = Not Started | 2 = In Progress | 3 = Achieved
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How to Support Participants in Writing Goals

1. Clarify the Timeframe

Determine whether the participant is setting 30-, 60-, or 90-day goals.

Tip: Start with 30 days for new clients to build early success.

2. Write Clear Goals Using SMART Guidelines

Encourage participants to define **S.M.A.R.T.** goals:

- **Simple**
- **Measurable**
- **Achievable**
- **Relevant**
- **Time-bound**

◆ **Poor:** "Get housing"

◆ **Better:** "Be accepted into Marvel Way apartments so I can regain custody of my son"

3. Identify a Doable Action Step

This is the *first move* toward the goal.

◆ **Example:**

"Contact Marvel Way for application and get on the waitlist"

4. Assign a Realistic Target Date

Guide the participant to choose a practical but firm deadline. Assist if necessary.

5. Evaluate & Score Progress

During check-ins, update the worksheet with:

- 0 = Not Started
 - 2 = In Progress
 - 3 = Achieved
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6. Write a Progress Note

Reflect on the participant's engagement, successes, or challenges.

♦ **NEW:** If the participant has achieved most or all goals, note whether they are ready to develop **new goals** or would prefer to **maintain and build consistency** with current progress.

♦ **Example:**

“Sally continues to make impressive progress. She is now enrolled at TMCC, remains engaged in recovery, and is actively pursuing reunification with her son. She has achieved most of her stated goals. At this time, she is comfortable maintaining her current structure and building consistency before developing new goals.”

7. File & Follow Up

- Upload completed forms to the participant's **OneDrive and CRM**.
 - Schedule the next check-in.
 - Copy progress note into the Case Note section of the participants CRM record
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30-Day Check-In Summary: Sally Sassypants

| Goal Area | Goal | Action Step | Target Date | Score |
|------------------|--|---|-------------|-------|
| Housing | Be accepted into Marvel Way Apartments | Contact Marvel Way for application/waitlist | 7/10/25 | 0 |
| Income/Education | Enroll in TMCC Panasonic Program | Contact TMCC for enrollment and financial aid | 7/15/25 | 0 |
| Recovery Pathway | Attend Celebrate Recovery at Summit Church | Contact church for schedule and rides | 6/23/25 | 0 |
| Personal Goal | Complete parole, regain custody, work at Tesla | Follow parole, attend school, maintain sobriety | 6/19/25 | 2 |

Total Score: 2 / 12

Percentage: 17%

Sample 60-Day Check-In Entry

| Goal Area | Update at 60-Day Check-In |
|-------------------------|--|
| Housing | Sally contacted Marvel Way and was told the waitlist is open but long. She submitted her application and is following up biweekly. Score: 2 |
| Income/Education | Sally applied to TMCC and was accepted into the Panasonic Pathway Program. She starts orientation next week. Score: 3 |
| Recovery Pathway | Sally has consistently attended Celebrate Recovery and even brought another participant with her last week. Score: 3 |
| Personal Goal | Sally is maintaining sobriety, attending visits with her son, and remains in full compliance with parole. Score: 3 |

◆ **Updated Total Score:** 11 / 12

◆ **Updated Percentage:** 92%

Progress Note:

Sally continues to make impressive progress. She is now enrolled at TMCC, remains engaged in recovery, and is actively pursuing reunification with her son. She has achieved most of her current goals. During this check-in, Sally expressed interest in **maintaining her current structure** to build routine and confidence before creating new goals. We will revisit potential new goal-setting at her next check-in.

Staff Review Section (For Each Monthly Check-In)

Reviewed by (Print Name) Signature Date