



Desert Blooms: Nourishing Future Abundance Through Investment

Improved Goal Achievement Through Coaching

2:15 – 3:45

June 12, 2024



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Margaret A. Cargill
PHILANTHROPIES

Tamalpais Trust
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TODAY'S SPEAKER

- Lanalle Smith
Senior Programs Officer
- I am a member of the Dine' (Navajo) Tribe
- 28+ years experience in facilitation and training, Native CDFIs, Program Development, Public Housing,
- I am a ICF certified coach through Leadership that Works and certified practitioner of the Trauma of Money
- I serve as a Board member for the NextStep Network and am an advisory member of the Building Healthy Places Network



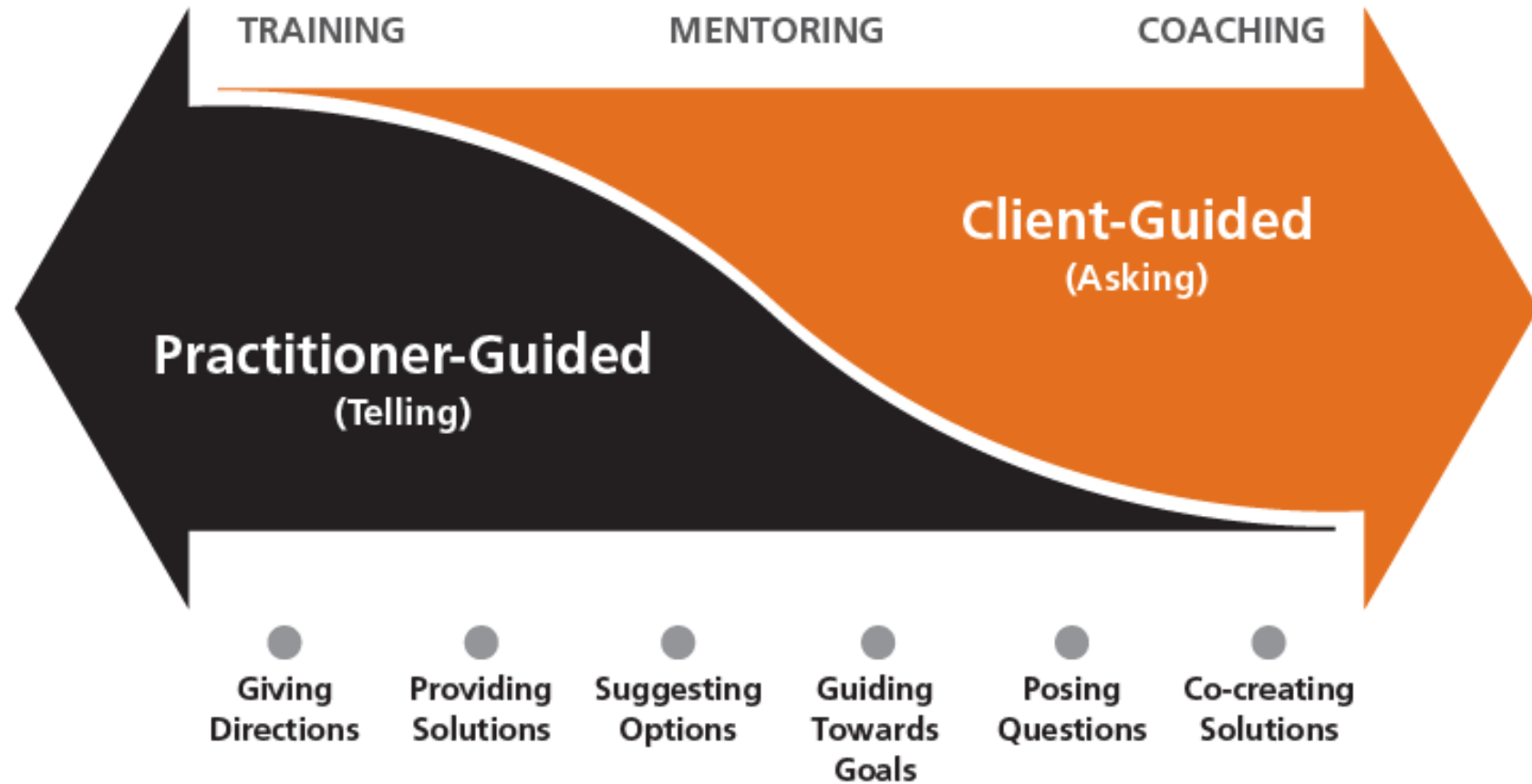


Introduction and Land Acknowledgement

What is Coaching and How Can I Use it With My Clients?



What is Coaching?



Qualities of a coach

- Curiosity
- Compassion
- Empathy
- Boundaries
- Intuition

Skills of a Coach

- Listening
- Empowering Questions
- Identifying Values
- Self-management



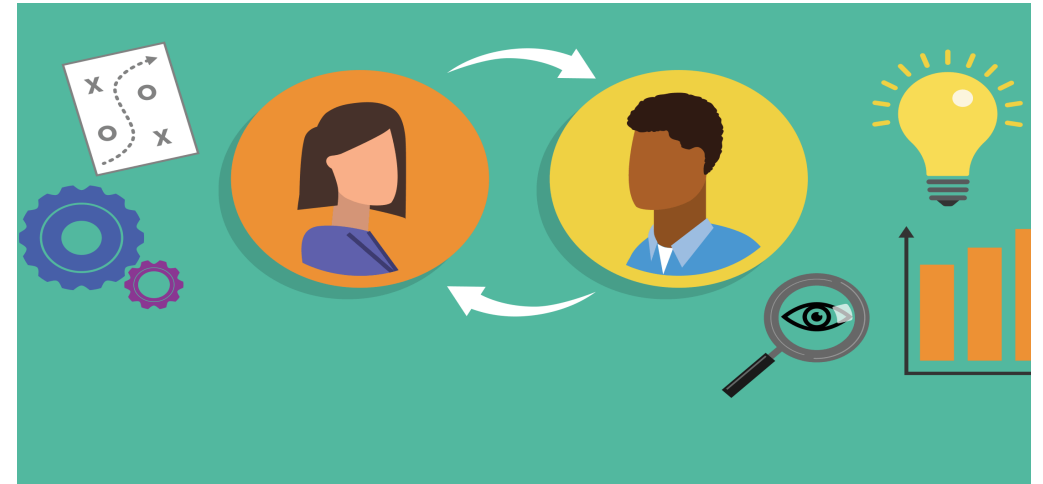
Shifting from Judgement to Curiosity





Asking Empowering/Curious Questions

Curious Question Activity



- Break into pairs for 10 minutes
- Discuss the Curious Questions that you had each created

Coach Session Components

- Briefly Describe Coaching
- Discuss Roles in the Coaching Relationship
- Discuss Confidentiality
- Explore What will Work Best for the Client
- Discuss Goals and Values
- Discuss the Change Process



Goal Setting Tools



Core Values

Clarifying Your Core Values

Take a look at the list of core values. Circle the five that are most important to who you are and rank them. If you have trouble choosing, reflect on what each value brings into your life – what would be missing without it? These values reflect what you stand for. Feel free to add words not listed that are essential to describing who you are.

Rank	Top Five Values	How do you embody this value?	How can you honor this value more fully?
1			
2			
3			
4			
5			



Goal Setting Action Plan

Goal Setting Action Plan

GOAL



Action #1

→ Next Steps

- 1 _____
- 2 _____
- 3 _____
- 4 _____

By When: _____

→ Next Steps

- 1 _____
- 2 _____
- 3 _____
- 4 _____

By When: _____

Action #2



Plan-Do-Review



Plan-Do-Review

This tool helps you to refine goals and make concrete plans to achieve them. First, identify your big goal, also known as a **milestone**. Then use the tool that follows to plan for each smaller goal to get to your milestone.

Major Milestone What are you trying to improve and how will it benefit you and/or your family?	
Goal What is the first goal under this step?	
Steps What are the small steps toward your goal? Keep the steps small so they are manageable and progress can be made. <i>For each step needed to reach the goal, use a separate step sheet found on the following page.</i>	STEP #1
	STEP #2
	STEP #3
	STEP #4

Plan Do Review

Step # : _____

Plan		
What actions will be taken? When will it be done? Where will it be done? What role will family members plan?		
Do		
Implement the plan and carry out actions.		
Review		
Did things happen according to plan?	<input type="checkbox"/> YES Celebrate and continue the plan. Continue to check and adjust as needed.	<input type="checkbox"/> NO What changes are needed? What will you do next to keep the plan on track?
How did the plan work for you and/or your family? What was successful? Were there any unexpected developments or outcomes?		
How did the plan impact you and/or your family? Were any action steps added or missed? Did things happen on time?		





*Building
Native
Communities*

FINANCIAL COACHING WITH FAMILIES

First Edition
TRAINING WORKBOOK



Coaching for Families 1.0

Coaching for Families: Next Level 2.0

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