Guidelines for Using the Roles & Goals

This document provides a detailed guide to working with the Roles & Goals, including:

A. Using Roles & Goals at Intake
      a. Commonly Chosen (and Pre-Selected) Goals
      b. Write-In Goals
B. Roles & Goals Follow-Up
C. Collecting Evidence of Goal Achievement

A. USING ROLES & GOALS AT INTAKE

New adult learners are interviewed by a program staff member using the Roles and Goals form during the intake process. The form should not become a barrier to good communication, so it's usually preferable to take notes on a separate piece of paper and fill the form in later. The staff member's top priority should be listening to the learner. If the concept of personal goals does not resonate with the adult learner, try getting the conversation started with questions like these:

- What would you like to be able to accomplish at work (or at home or in the community or personally) that you can't accomplish now?
- Which goals would you like to reach as a result of your tutoring sessions?
- I know you want to read better, but *what* would you like to read?
- I know you want to write better, but *what* would you like to write?
- Think of yourself at work (or at home, or in your neighborhood). What would you like to do with your improved reading and writing skills?
- Are there things you've always wanted to do but couldn't because of limited reading and writing skills?

Staff may also want to use a visual cue such as the *Adult Role Map*. Using the map or a similar form also makes it easy to transfer notes taken during the intake onto the Roles & Goals form at a later time.

When using the Roles and Goals form with the learner for the first-time, staff should focus on two areas:

1. The list of commonly chosen goals
2. The space for other goals which can be added.

1. Commonly Chosen (and Pre-Selected) Goals

The commonly chosen pre-selected goals listed on the form are included because they are:

- Most often chosen by adult learners;
- Determined, by program staff, to be relevant and popular during 2019 revision of the Roles and Goals framework;
- Typical of literacy instructional activities;
- Significant in an adult learner's life; and
- Meaningful to stakeholders.

On the Roles & Goals form, learner goals are arranged within the four major areas (roles) of an adult's life: Lifelong Learner, Worker, at Home and as a Family Member, and Community Member and Citizen.

Program staff should selectively choose one or more of the commonly-set goals that are of interest to the learner. Notes can be added to the goals where necessary to make them more specific to the individual needs of the learner. The date of the intake interview can be used to note the month and year the goals were set.

It will usually be fairly easy to interpret where learner goals should fit on the Roles & Goals form. For example:

- If the learner says that one goal is to understand how to personally use his or her smart phone, that goal is best placed under **Lifelong Learner/Use new technology skills** and a note added to the form specifying **smart phone**.

- If the learner tells us that he wants to use the library to checkout materials, but needs to first replace a lost card, then that goes under **Use the library** with perhaps the note **replace library card** added.

My Goals as a Lifelong Learner	Date Goal Set	Date Making Progress	Date Goal Met	My Goals as a Worker	Date Goal Set	Date Making Progress	Date Goal Met
Learn the alphabet, letters, and sounds				Search for a job			
Learn math skills				Apply for a job			
Read a book				Interview for a job			
Read a more difficult book				Get a job or a better job			
Read news or a magazine				Perform current job tasks better			
Write a note, message, or text				Use work related technology			
Write a letter, poem, story, or essay				Read work-related material			
Fill out a form or application				Write work-related material			
Use new technology skills – *smart phone*	6/20			Obtain a license or certificate			
Use the library – *replace library card*	6/20						

Goals within the *at Home and as a Family Member* role underwent significant changes during the latest revisions to the Roles and Goals framework. In part, this was due to the State Library's new Family Literacy initiative, which has reframed how we think about literacy within the family and at home.

Many of the revised goals in this section focus on communication skills. Whether it's communicating with educators (the school system), medical professionals, or with other family members, these goals recognize the importance of understanding others, and making yourself understood, through verbal and written communication.

My Goals at Home and as a Family Member	Date Goal Set	Date Making Progress	Date Goal Met	My Goals as a Community Member and Citizen	Date Goal Set	Date Making Progress	Date Goal Met
Share a book with a family member				Access community resources			
Take a family member to a library program				Get involved in the community			
Help a family member with homework and studying				Speak to others about the library literacy program			
Read a medicine label				Get a driver license			
Pay my bills				Become a citizen			
Access help with family legal documents				Prepare to vote			
Communicate effectively with educators				Vote			
Communicate effectively with medical professionals							
Communicate effectively with family members							
Navigate systems and services							

Goals such as *Access help with family legal documents* and *Navigate systems and services* are responding to the need for families to seek professional services and family support—challenges many of our families face on a regular basis. Examples of *systems and services* might include agencies dealing with housing, immigration, employment, and banking, etc.

2. Write-In Goals

Staff can also write in goals that are of interest to the learner but not included in the list of commonly chosen goals. As with the commonly chosen goals, indicate the date the goal was set (initial interview) using the month and year.

Other Goals in the Lifelong Learner Role		
Read the Bible – New Testament	6/20	
Read menus – at Coco's & Chili's	6/20	

When first setting goals, staff, tutors, and learners should not be overly ambitious. Too many goals can be overwhelming. Staff should help the learner think in terms of what can be accomplished within the next 4-6 months. Far-reaching goals are fine, but long-term goals like "read the Bible" should be balanced with something short-term and more easily accomplished like "use the library."

Once the form is completed, a copy (electronic or paper) is placed in the learner's file in the literacy office. Anyone who works with the learner—volunteer tutor, computer lab volunteer, staff—should be briefed on that person's goals. Tutor/learner teams should keep a copy of the learner's goals and refer to them at tutoring sessions.

B. ROLES & GOALS FOLLOW UP

At a minimum of every six months, literacy staff will be checking in with each tutor-learner pair to see how they are progressing toward learner goals. This is an opportunity to:
- Check progress
- See if the instruction is on course for what the learner wants to accomplish
- Make sure that the learner's needs are being met
- Help the learner see that they are making progress
- Build confidence in the tutor-learner pair as goals are achieved
- Motivate the learner and tutor to keep up the good work and continue with their tutoring sessions

When updating the Roles & Goals form, staff and tutors should use the "date met" column (month/year) to indicate when progress was made, goals were met, and new goals were set.

- There must be a date in the "goal set" column for every "goal met" to document the change that happened in a learner's life because of their improved skills. If for any reason the "goal set" date was left off the updated form, staff and tutors should

attempt to determine the date—by asking the learner, recalling the date of the meeting, or estimating the information. If it is not possible to establish even an approximate "date set" then that goal should instead be considered an "unanticipated achievement."

- Again, use the month and year to indicate "Goal Met" or "Date Making Progress."

Learners can re-set the same goal, especially if it reflects a desire to reach a higher level of competence and/or fluency. For example, a learner may want to write a more complex story or essay. These goals may be updated by resetting the "Date Making Progress" during Roles & Goals follow-up.

My Goals as a Lifelong Learner	Date Goal Set	Date Making Progress	Date Goal Met
Learn the alphabet, letters, and sounds	6/20		12/20
Learn math skills			
Read a book			
Read a more difficult book	8/20	12/20	
Read news or a magazine	6/20		
Write a note, message, or text			
Write a letter, poem, story, or essay	6/20	12/20	
Fill out a form or application			
Use new technology skills – *smart phone*	6/20		12/20
Use the library-*replace lost card*	6/20		7/20
Get a diploma			

- Note that the "goal met" can reflect the real date the goal was achieved (see "Use the Library") and does not have to be the date the follow-up was administered (on 12/20 in this example). New "goals set" can show the date that the learner decided to set a new goal or the date that the form was administered.

- Also notice that the learner is no longer interested in "reading a news or a magazine."

Use the same procedure for updating write-in goals.

Other Goals in the Lifelong Learner Role			
Read the Bible – New Testament	6/20	12/20	
Read menus -- Coco's, Chili's	6/20		12/20

Tutors should also keep track of some of the things that may have happened in the learner's life resulting from their improved reading and writing skills but were not set as goals. Add those things here:

> **Other things I have achieved in this role since the last Roles and Goals review:**
>
> *Able to read street signs/street names and can find new places more easily.*

C. COLLECTING EVIDENCE OF GOAL ACHIEVEMENT

Tutors, learners and program staff are encouraged to share real-life evidence of goals achieved by adult learners.

- Evidence might consist of things we can physically point to which show that a goal has been achieved. For example:
  o An application filled-out correctly,
  o A letter or email written to a family member,
  o A book read for the first time,
  o A note written to a child's teacher
  o Etc.

- Evidence might also take the form of a conversation with the learner in which he or she describes goals they feel they have achieved.

- A tutor may also witness progress toward goal achievement--examples of progress which the learner may not have even thought of. Tutors are encouraged to discuss these observations with their learners and report these achievements, too.

By collecting specific evidence, or indicators, of goal achievement, we can have confidence that the *Roles & Goals* process accurately represents the accomplishments and success stories of our learners.

- To facilitate the collection of this evidence of goal achievement, programs can provide an easy-to-use worksheet (See *Roles & Goals Evidence/Indicators of Goal Achievement*) or some other means for tutor-learner teams to record this important information.

- Programs can also suggest that tutor-learner teams use a *Learner Portfolio* to discuss and record achievements. They can easily integrate the use of the *Portfolio* into their regular sessions, setting aside time every few weeks to discuss what to include.

It is not necessary to submit this evidence to the State Library. This process is designed to help tutor-learner teams evaluate the work being done in their tutoring sessions and complete the semi-annual Roles & Goals update. Local programs might wish to include this information in the adult learner's file for later reference. Of course, the learner and tutor will also want to keep their own copies.