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**MODULE 4, FAMILY DREAMS AND GOALS**, encourages families to set goals together by prioritizing and clarifying their objectives.

The four activities in this chapter help families work together toward identifying their dreams:

- **Win-Win Waltz** is a three-step tool for effective joint decision-making and action planning.
- **Visualizing Common Goals** is a visualization activity that helps participants think to the future and their dreams.
- **Prioritize What You Want, Get What You Want** uses a role play and the construction of a mobile to help families prioritize their goals.
- **Create a Yellow Brick Road to Your Goal** is a board game to help families think through the obstacles and detours that they will need to overcome in order to meet their goals.

# 27.

## The Win-Win Waltz

**OBJECTIVE:** Learn the three steps of the “Win-Win Waltz” as a tool for effective joint decision-making and action planning.

**TIME:** 40 minutes

**MATERIALS:**

Write three “situation cards” on large sheets of paper: (write one title on each card)

Express Initial Positions

Explore Underlying Concerns

Create Win-Win Solutions

Situation Cards

Win-Win Waltz Worksheet: distribute one copy to each participant

**NOTE TO TRAINER:**

Place the three Cue Cards so that they are visible to all the group members (e.g., facing the group, propped on chairs in front of the group). Spread the cards/chairs out so there is room for two people to stand next to each.

**TALKING POINTS:**

One hallmark of a true partnership is the effectiveness of two people’s shared decision-making. “Effective” means they are able to make decisions that are responsive to the full range of concerns of both partners.

These steps of the win-win waltz can be used to make decisions about upcoming events (shared decision-making) and to change things that are not working (fix-it talk). The only difference is that fix-it talk begins with two initial steps.

Give the following initial explanation, pointing to each Cue Card as you explain it:

A waltz has 3 steps, as does collaborative problem solving:

1. Express initial positions;
2. Explore underlying concerns; and
3. Create win-win solutions.

**ACTIVITY:**

Walk through the following example to be sure that everyone understands the difference between, on the one hand, concerns (fears, values, motivations) and, on the other hand, positions and solutions (plans of action).

**STEP 1:** Express initial positions:

Peter and Mary want to buy a car. Peter says, “Let’s buy a Ford.”

Mary says, “No. I want a Toyota.”

**STEP 2:** Explore underlying concerns:

Ask the group what Pete’s concerns might have been that led him to suggest a Ford.

Peter might say: “The prices are reasonable. The dealership is close by so it will be easy to take care of maintenance and repairs.”

Emphasize that both sides need to explore their underlying concerns and ask then for what Mary’s might be.

Mary might say: “I don’t want to keep taking the car back to the shop; Toyota has a good repair record. I want as much room as we can get for passengers—for our kids and for their friends.”

**STEP 3:** Create a plan of action responsive to both. Go with the information generated by the group.

Peter and Mary might say: “Let’s get a Consumer’s Report guide to cars so we have full information on repair rates, roominess, and prices. Let’s also check in the Yellow Pages for which dealers have repair facilities near us.”

**HINT:** Encourage thinking in terms of solution sets that are multi-piece answers.

Invite one couple in front of the group to try the “waltz” sequence. Use the situation of a couple deciding what to do for dinner. Hold up the relevant Cue Card for each step.

Emphasize the difference between concerns and positions (action plans/specific solutions). Make one list for all of their concerns. Then list three possible solutions: her idea with modifications, his with modifications, and at least one new solution (possible final solution).

Practice distinguishing concerns and solutions by asking the group:

Let's practice looking at the difference between concerns and solutions some more. If you and your spouse were discussing who is responsible for what household jobs, what might be concerns, and what might be solutions?

E.g., concerns might be how long each job takes, how much he or she enjoys doing the job, or how much preparation the job takes. A solution, by contrast, might be: He cooks; she cleans.

Have a different couple come to the front and traverse the three steps on their own to the dilemma: "What should we do for vacation this summer?"

Using the Win-Win Waltz Worksheet, they write out the three steps.

Pass out additional Situation Cards, and invite additional couples to try the "Win-Win Waltz" in front of the group.

**GROUP DISCUSSION:**

Most couples have systems for making decisions together such as taking turns on who gets their way, allowing whoever feels most strongly about the issue gets their way, or reaching a compromise (they both give up some). How do these three options compare to the Win-Win Waltz?

**CONCLUSIONS:**

With the Win-Win Waltz, virtually any decision becomes easy and mutual. Both big and little decisions—where to live and what to eat for lunch—can become simple and shared. The more skilled a couple becomes, the faster the decision-making—and the more satisfied you both feel with the resulting plan of action.

## HANDOUT: Win-Win Waltz Situation Cards

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<p><b>WIN-WIN WALTZ</b></p> <p>You like to watch TV in the evenings, and your spouse wants you to go shopping in the mall.</p>	<p><b>WIN-WIN WALTZ</b></p> <p>Your partner has invested a large amount of your savings in a high risk venture. You want to have a sense of financial stability.</p>	<p><b>WIN-WIN WALTZ</b></p> <p>Your partner likes to talk about what bills have to be paid after dinner. You like some quiet time after dinner.</p>
<p><b>WIN-WIN WALTZ</b></p> <p>Your partner likes to go out jogging, and you like sitting and talking together in the evening.</p>	<p><b>WIN-WIN WALTZ</b></p> <p>Your car has broken down. You would like to get a new car, and your partner would like to have the old car fixed.</p>	<p><b>WIN-WIN WALTZ</b></p> <p>You and your spouse need to decide what neighborhood to live in. You like a more expensive area because the schools are better.</p>
<p><b>WIN-WIN WALTZ</b></p> <p>Your partner wants to buy a new T.V. You are happy with the old one.</p>	<p><b>WIN-WIN WALTZ</b></p> <p>You need to decide what to do on Saturday afternoon. Your sister's birthday party and your spouse's big soccer match are both at the same time.</p>	<p><b>WIN-WIN WALTZ</b></p> <p>You are trying to decide what to watch on T.V. You prefer sports; your spouse wants to watch the reality show.</p>
<p><b>WIN-WIN WALTZ</b></p> <p>You don't like the way your spouse offers you coaching when you do competitive activities together.</p>	<p><b>WIN-WIN WALTZ</b></p> <p>When you call the family for dinner, you want them to come right away, but your spouse takes his/her time.</p>	<p><b>WIN-WIN WALTZ</b></p> <p>You are worried that your spouse's back problems may be serious. Your spouse doesn't want to go to a doctor.</p>

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Adapted, with permission, from the Power of Two Marriage Skills Workshops by Heitler and Hirsch. See [www.PowerOfTwo.org](http://www.PowerOfTwo.org).



# HANDOUT: Win-Win Waltz Worksheet

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A's Initial Position	B's Initial Position
<p style="text-align: center;"><b>A and B's Underlying Concerns</b></p> <ul style="list-style-type: none"><li>• _____ Specifics _____</li><li>• _____ Specifics _____</li><li>• _____ Specifics _____</li><li>• _____ Specifics _____</li><li>• _____ Specifics _____</li><li>• _____ Specifics _____</li></ul>	
<p style="text-align: center;"><b>Solution Options</b></p> <p>A's initial solution with modifications so that it is a win-win solution set: _____ _____ _____</p> <p>B's initial solution with modifications so that it is a win-win solution set: _____ _____ _____</p> <p>New idea altogether: _____ _____</p> <p>Another new idea altogether: _____ _____</p>	

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# 28.

## Visualizing Common Goals

**OBJECTIVE:** Encourage families set goals together.

**TIME:** 15 minutes

**MATERIALS:**

Common Goals Handout

**TALKING POINTS:**

Talk about how effective money management depends on the way a family chooses to live and the goals they plan to achieve. It is important for the family to take time to discuss and set their goals together. Having a voice in establishing family goals will help parents and children realize that the family is working together to set priorities and solve their financial problems.

**ACTIVITY:**

Ask the participants to begin to think about where their families are today and where they want their families to be in five or ten years. For example, maybe your family really needs a vacation together. Maybe they would like to own a safer, more reliable car, buy a home, or send a family member to college. We are going to give you a chance now to think about your hopes and dreams and share them with your partner or family.

Ask participants to settle comfortably in their chairs. Ask them to relax. Now ask them to close their eyes and let their minds be open to what it is they want out of life for their families. Explain that you will take them through a visualization activity. Slowly speak the following sentence beginnings. Pause for 30 seconds between phrases to let participants' minds have time for creative imaginations.

**Within three months, what I want for my family is...**

**In one year, what I want for my family is...**

**In five years, what I want for my family is...**

**In ten years, what I want for my family is...**

Ask participants to open their eyes and write their sentence completions on the handout. Give them 5 minutes to fill-in details of their visualizations and write down their goals.

**GROUP DISCUSSION:**

If families or couples are attending the class, ask them to join up with their partners or family members and share and compare their hopes and dreams. After sharing, ask each family to agree on one family goal for each time period. If families are not in class, encourage participants to go home and share their goals with the family and to repeat the activity.



## HANDOUT: Common Goals

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**WITHIN THREE MONTHS, WHAT I WANT FOR MY FAMILY IS...**

**IN ONE YEAR, WHAT I WANT FOR MY FAMILY IS...**

**IN FIVE YEARS, WHAT I WANT FOR MY FAMILY IS...**

**IN TEN YEARS, WHAT I WANT FOR MY FAMILY IS.....**

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# 29.

## Creating a Priority Mobile

**OBJECTIVE:** Introduce the concept that prioritizing what you want will help you get what you want.

**TIME:** 35 minutes

**NOTE TO TRAINER:**

It would be helpful to have an example of a completed priority mobile to show participants.

**MATERIALS:**

One metal clothes hanger per couple or family

A large supply of colored paper and markers

Scissors (1 per 2 families)

Tape (1 per 2 families)

Small safety pins (5 per family)

String (a piece about 2' per family that they'll cut into pieces)

**ACTIVITY:**

Two instructors (or an instructor and class member) perform the following role play without providing much introduction:

A couple is in their apartment and distressed about money.

Woman, very distressed: "We got a notice today from the landlord that we have to move by the end of the month. We haven't paid rent in two months!!"

Man (aside to class): "We have these arguments about money all the time!"

Man, also distressed: "You waste so much money! You spend way too much money on your nails. I saw the baby's sneakers cost \$50! It's stupid to pay \$50 for sneakers when the kid can't even walk."

**Woman:** "Well, you bought rims and a stereo for the car. Talk about a waste! It's OK for you to waste money, but you don't like me to buy stuff the family needs. And where did our rent money go!"

FREEZE.

Ask the class what they thought about the role play and what it meant to them. As you wrap up the conversation, emphasize the importance of "Prioritizing what you want and working together." This will bring you to the next part of the activity.

Directions for the Priorities Mobile:

Distribute the supplies and give groups 20 minutes to work together. Ask each group to follow these steps:

- a.** Discuss and decide what financial priorities you will write on your mobile pieces and then label your mobile diagram.
- b.** Fashion a triangular colored paper “sleeve” and tape it to cover your hanger. Write your one or two top priorities on each side of the triangle sleeve (same priority written on both sides or one priority on one side and one on the other side). Encourage participants to be creative and add colorful symbols and pictures to their words.
- c.** Cut two medium-sized geometric or other shapes and write your next most important priorities on these (two or four priorities total), perhaps with symbols added. Attach these shapes to either end of your triangle hanger with 3” to 4” lengths of string, either by tying or using pins.
- d.** Cut four smaller-sized geometric or other shapes and write your next most important priorities on ( four priorities total), perhaps with symbols added. Attach these shapes to the two medium-sized shapes in any place you want, again using 3” to 4” lengths of string and pins.

When the time is up, call them together and let each couple or family present their creation to the whole group.

# 30. Create a Yellow Brick Road to Your Goal

**OBJECTIVE:**

To help families conceive, clarify, and commit to achieving their goal and to create a family reminder of the goal and their path toward it.

**TIME:** 30 minutes

**MATERIALS:**

Each family will need:

A large piece of yellow paper on which they can draw or cut-out the path of the yellow brick road

A handout of the suggested road shape and model billboard shape for goal signs

A set of 4 red paper bricks, 4 off-ramps, 4 stop signs, and 2 rock slides made from colored paper

Glue sticks or scotch tape

Scissors

Extra sheets of colored paper

Colored markers

**NOTE TO TRAINER:**

If you wish, you could start this activity in class but ask that people finish it at home and bring it back the following session for sharing and display.

It would be very helpful to create your own yellow brick road ahead of time as a model for the class. You will also be better equipped to answer questions about the process.

We recommend that you follow the order of activities and wait to give out materials until after the goal-setting step. When people get materials, their attention is drawn to them.

**ACTIVITY:**

Show the Instructor's "Road" and explain the overall objective and outcome of this activity.

Pointing to the Instructor's model, explain each piece of material and what it symbolizes:

The materials for the yellow brick road symbolize the following:

The yellow brick road is the route to your goal.

Red bricks mark unexpected detours and chosen scenic byways.

Ramps introduce the transition from yellow bricks (direct road)

to red bricks (indirect road) and back again to yellow bricks.

Stop signs mark times to regroup, reflect, re-plan.

Rock slides mark obstacles on the road.

Emphasize that participants may use their own creativity and the extra paper to add other aspects to their road. They can also redesign their road's shape, if they want to.

Ask couples and families to decide together on one long-term goal that involves money, then several medium-term goals, and then several short-term goals that will take them from the here-and-now to their long-term goal.

Have a couple or family representative come and get their set of materials.

Together, couples and families draw their yellow brick road route on their flip chart or poster paper, then draw and label their billboards for short-, medium-, and long-term destination or goals at points along the yellow brick road. Continuing together, they create their real route as best they can anticipate it, using the various materials and mixing serious and fun anticipation of their various difficulties and solutions along the way.

After 15 minutes or when most have completed their roads, ask each couple or family in turn to explain their roads to the class.



