



**CASE WESTERN RESERVE
UNIVERSITY**
Department of
Human Resources

Career Well-Being Incentive Program
Sample Track 4: Customized Goals Plan

Staff Goal Example: Client can identify up to 4 goals or interests and a plan will be created based on need. Sample goals: 1. Interested in earning a degree at CWRU 2. Interested in learning more about a particular field/career path 3. Strengthen public speaking skills.

Career Well-being Incentive Category: Coaching and professional development training sessions combination

Activity 1: Consultation meeting with staff member and Career Development Manager

Activity 2: Client exercise: spend time researching the degrees available at CWRU. Once you narrow down your interest, set up a meeting with the admissions department in each area to learn more. Setup and complete a meeting with tuition benefits if needed.

Activity 3: 1:1 meeting with Career Development Manager to discuss degree research, admission meetings, and other relevant findings to degree pursuit. Prepare for activity 4.

Activity 4: Informational interviews to learn about fields of interest. Complete related exercises and set up and complete at least 2 informational interviews per field of interest.

Activity 5: 1:1 meeting with Career Development Manager to discuss informational interview activity and meetings. Discuss interest and fit in the field of interest.

Activity 6: training video 1: public speaking and related exercise files

Activity 7: training video 2: public speaking and related exercise files

Activity 8: 1:1 meeting with Career Development Manager to discuss training videos 1 and 2 and preparation for activity 9.

Activity 9: client exercise: develop a presentation. Invite a group of people to listen/evaluate.

Activity 10: 1:1 meeting with Career Development Manager to discuss presentation, evaluation notes, and any next steps for development.

Other Considerations

Customized plans will vary slightly from the above. There may be more or less activities, resources, or 1:1 meetings based on the needs and learning style of the individual. All plans will, however, meet [Wellness Program Incentive](#) requirements. Staff members need to complete at least 7, one-hour long assignments or a total of 7 hours of combined programming to meet incentive program requirements. For this reason, plans created by the Professional Development Center (PDC) will consist of 8 activities/engagement or more.

This plan is a DRAFT and is not to be used to pursue the Wellness Incentive without a meeting with the Career Development Manager. Request a meeting to discuss this plan [here](#).

Questions related to the above plan should be sent to the Career Development Manager, Andrea Hess, at axh479@case.edu.