Client-led outcomes

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| **Client name:** | |  | | | | | | | | | | | | | | | | | |  | | | **Date:** | | | |  | | | | |
| **My Goal is:** | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **Provider use only** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | Key financial capability target (✓ tick one): | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | ¨ | Immediate one-session need | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | ¨ | Budgeting to help keep track and stabilise | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | ¨ | Strategies to increase income | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | ¨ | Strategies to decrease spending | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | ¨ | Starting a savings plan | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | ¨ | Understanding and reducing debt | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | ¨ | Learning new money skills / updating knowledge | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | ¨ | Other | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Client engagement (✓ tick one): | | | | | | | ¨ | | 1 session | | | | ¨ | | 2-3 sessions | | | | | | ¨ | | | 4+ sessions | | | | | | | |
|  | | | | | | | ¨ | | Kahukura | | | | ¨ | | Did not complete | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **How do you feel about your progress towards reaching your goal today?** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  |  | |  | | |  | |  | |  | |  | | | |  | |  | | | |  | | |  | | |  | |  | |
|  | | | 0 | | 1 | | | 2 | | | 3 | | | 4 | | | 5 | | 6 | | | 7 | | | | 8 | | | 9 | | 10 |
| Session | Date | | I’ve just started my journey | |  | | | | | | | | | | | | Halfway there | |  | | | | | | | | | | | | I’ve fully reached my goal |
| Start session |  | |  | |  | | |  | | |  | | |  | | |  | |  | | |  | | | |  | | |  | |  |
| 2 |  | |  | |  | | |  | | |  | | |  | | |  | |  | | |  | | | |  | | |  | |  |
| 3 |  | |  | |  | | |  | | |  | | |  | | |  | |  | | |  | | | |  | | |  | |  |
| 4 |  | |  | |  | | |  | | |  | | |  | | |  | |  | | |  | | | |  | | |  | |  |
| 5 |  | |  | |  | | |  | | |  | | |  | | |  | |  | | |  | | | |  | | |  | |  |
| 6 |  | |  | |  | | |  | | |  | | |  | | |  | |  | | |  | | | |  | | |  | |  |
| 7 |  | |  | |  | | |  | | |  | | |  | | |  | |  | | |  | | | |  | | |  | |  |
| 8 |  | |  | |  | | |  | | |  | | |  | | |  | |  | | |  | | | |  | | |  | |  |
| 9 |  | |  | |  | | |  | | |  | | |  | | |  | |  | | |  | | | |  | | |  | |  |
| Final session |  | |  | |  | | |  | | |  | | |  | | |  | |  | | |  | | | |  | | |  | |  |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Please tick (✓) how you feel about your progress towards reaching your goal today  ***Note:*** *The scale is from dark to light (0 to 10). The darkest shade means you have only just begun your journey, a medium shade means you're making progress, and the lightest shade means you feel you've achieved your goal.* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |