
STATE OF IOWA DEPARTMENT OF

Health ^{AND} Human

SERVICES

Health Home Learning Collaborative

Step by Step SMART Goal Creation

April 2023

This training is a collaborative effort between the Managed Care Organizations and Iowa Medicaid

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S.M.A.R.T. GOAL PLANNING

Creating strong and effective S.M.A.R.T. goals

Learning Objectives

- Review SMART goal acronym
 - Specific
 - Measurable
 - Attainable
 - Relevant
 - Time – bound
- Discuss contents of a SMART goal
 - Member information & background
 - Assessments
 - ‘I WANT’ statement
 - ‘I WILL’ statement
 - Background, barriers
 - Ranking
 - Interventions & support
- Identify SMART goal do’s & don’ts
- Breakdown member goal using the SMART goal acronym
- Introduce SMART Goal Templates and their uses
 - Example
- Demonstrate use of Health Home goal setting template
 - Example
- Breakout: Now it’s your turn!
- Sharing with your peers
- Wrap - up

CREATING S.M.A.R.T GOALS & OBJECTIVES

S

**Who? What?
Where?
When?
Which? Why?**

Distinct
No ambiguous language

M

**How much?
How many?
How often?**

Provides feedback
Know when goal is *complete!*

A

Limits?
Groups responsible
Individual responsible

R

Feasible?
Challenging
Attainable in given time frame

T

When?
Aggressive, yet realistic
Beginning & end time given

Where to start....

SMART goals are meant to address a member's desires; what **THEY** want to accomplish. This is based on:

- 📌 Member's background information
- 📌 Assessments (interRAI/LOCUS/HRA)
- 📌 Any other information related to member's desires

IHHs will:

- 📌 Create **excellent** goals in *standardized* format

- **I WANT**
 - What member wants from the goal
 - Does not need to be measurable or observable
 - Can create the goal outcome
 - Does not need to match the outcome
- **I WILL**
 - Objectives for services
 - Measurable and observable
 - Attainable for the member
 - Members have input in the objective
- **Background, Barriers & Ranking**
 - Justifies why the goal is in place
 - In narrative form
 - Why is this important to the member
 - Obstacles for completing goal
 - Risk if goal not in place
 - Rank: Importance to member (1st, 2nd, 3rd, etc.)
- **Interventions & Supports**
 - How the team will support the member
 - Start & end of each step

SMART GOALS DO'S & DON'TS

Be **specific** in your goal setting

✔ **DO**



Include members, family, supports in goal development

✔ **DO**



Set goals that stretch or challenge your member

✔ **DO**



Select goals that relate to your member's life

✔ **DO**



Set a start and end date for goals

✔ **DO**



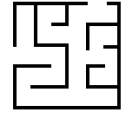
Be flexible & adjust goals as needed.

✔ **DO**



Allow vague goal setting habits

✘ **DON'T**



Choose/write goals without member involvement.

✘ **DON'T**



Set unachievable goals that frustrate the member

✘ **DON'T**



Select goals that are irrelevant to member's circumstances

✘ **DON'T**



Expect perfection!

✘ **DON'T**



Lose sight of the big picture!

✘ **DON'T**



Example: S.M.A.R.T. Goal Breakdown

“I want” statement:

I **want** to maintain my physical health by exercising weekly through April 15, 2023.

“I will” statement: (observable, measurable)

S: I **will** walk around my neighborhood for 20 minutes three days a week, depending on weather conditions.

M: I **will** record each walk on my calendar, to ensure I complete my 3 walks each week, until April 15th.

A: Tracking my walks and recording time I walked is a manageable goal for me. By writing it down I will remember when I walked and how long it took me. It will help me build up my intensity as I walk more often or walk further.

R: Walking for 20 minutes, three times a week will improve my overall physical health and will also help my mental health.

T: I **will** walk a *minimum* of 20 minutes, three days a week by April 15th, 2023.

Still not sure? Here's another way: S.M.A.R.T. Goal Template

“I will [member's goal here] by [how member will do the goal]. I will know I am making progress because [how member will measure the goal] for [time goes here].

BECOMES

“I will [*increase my physical activity*] by [*walking three times each week*]. I will know I am making progress because [*I will record my walking each day I walk on my calendar*] for [*the next 2 weeks*].

Goal: I want to improve my *physical and mental health* by utilizing supports to cope with stressors or as a crisis arises by 7/31/23.

Goal 1: I want to improve my **physical health** by utilizing my supports by 7/31/2023.

1. I will identify one activity I am able to do with support from staff by April 5, 2023.
2. I will use the treadmill in our home for 20 minutes, on Monday, Tuesday and Thursday for 2 weeks, starting April 5, 2023, and ending April 19th.
3. I will document my treadmill use and time used on a calendar with the assistance of staff each time I use the treadmill.
4. I will increase my treadmill use by one day, on Saturdays, and follow steps 2-3 with assistance from a staff member through May 15, 2023.

Goal 2: I want to improve my **mental health** by utilizing supports to cope with stressors or as a crisis arises by 7/31/2023.

1. I will identify and discuss with staff triggers that cause my stress level to increase in order to prevent a crisis situation weekly for 2 weeks, starting April 5, 2023.
2. I will identify and discuss and review with staff coping skills that I can use to reduce my stress level or prevent a crisis weekly for 2 weeks, starting April 5, 2023.
3. I will identify and review the supports I need from others and when to use them in different situations starting April 5, 2023.
4. I will review and discuss my triggers, coping skills, and supports needed with staff on a weekly basis April 5, 2023, to May 15, 2023.

Transferring to health home template:

GOAL (does not need to be specific): I want to increase my physical activity.			
My expected objective (measurable/observable) I will walk three times a week on my treadmill for the next two weeks, starting April 1, 2023.			
Background / barrier(s) to meeting goal: Joe does not like to get outside and likes to watch TV most of the time. His doctor wants him to get more physical activity because he is pre-diabetic. He can improve his health with weekly exercise.			
If I had to rank this goal (how important is this to me or my caregivers, this would be [most], [second], [third] [fourth] most important): 1st [most important]			
Interventions and supports, including incremental action steps	Person(s) Responsible	Start date	End date
I will walk on my treadmill Monday, Wed., and Thursday for 20 minutes each day.	Member, Staff	April 1, 2023	April 15, 2023
I will pick another day to walk on my treadmill if I miss Mon., Wed. or Thursday.	Member, Staff	April 1, 2023	April 15, 2023
I will mark on my calendar the days of the week that I walked on my treadmill for 20 minutes.	Member, Staff	April 1, 2023	April 15, 2023
I will share my calendar with staff member to show my progress using my treadmill for exercise.	Member, Staff	April 1, 2023	April 15, 2023

Now it's your turn!

Creating strong S.M.A.R.T. Goals

Wrap - up

How did it go?

What were your
biggest
challenges?

How will this
help you moving
forward?



Questions