

Empowering Members through SMART Goal Setting

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Please consider completing this pre-test while we wait.
Link: <https://www.surveymonkey.com/r/SMART-pre>



Health and
Human Services

Topics

- ▶ Why goal setting matters in healthcare management
- ▶ Understanding SMART goals
- ▶ Case study examples
- ▶ Move into action

Goal setting

- ▶ Setting goals and objectives is helpful to achieve desired healthcare outcomes
- ▶ Goals are forward-facing and provide a 'true north' or guidance
- ▶ Member involvement in goals is key

Without goals, it's like sailing without a destination – you might move, but you won't know if you're going in the right direction.

Goal types

Long-Term Goals

- Typically take more than a year to achieve
- Broader in scope
- Require more planning and resources
- Examples: Earning a college degree by 2028, buying a house in 5 years, or starting a successful business

Short-Term Goals

- Usually accomplished within a year or less
- More immediate and specific
- Often serve as stepping stones to long-term goals
- Examples: Learning a new software in 3 months, saving \$5,000 by the end of 2025, or losing 10 pounds in 2 months

SMART Goals

- SMART is an acronym that provides a framework for setting effective goals
- Example: Increase my monthly sales by 25% by December 2025 through implementing new marketing strategies and expanding my client base.

Quality of Life Domains

- ▶ Employment, valued social roles, daily living
- ▶ Community housing and living
- ▶ Community Engagement
- ▶ Social and personal relationships
- ▶ Healthy living
- ▶ Choice and control
- ▶ Safety and security
- ▶ Personal development and fulfilling aspirations

Quality of Life Domains - Examples

► Social and personal relationships

- Regular social engagement with family and friends
 - Events, meetings
 - Phone calls, visits
- Spiritual organizations, clubs, sports, other social groups

► Safety and security

- Feeling and being safe and secure – consider emergency plans, social circles, online safety, guardianship, legal rights, etc.

Why SMART goals?

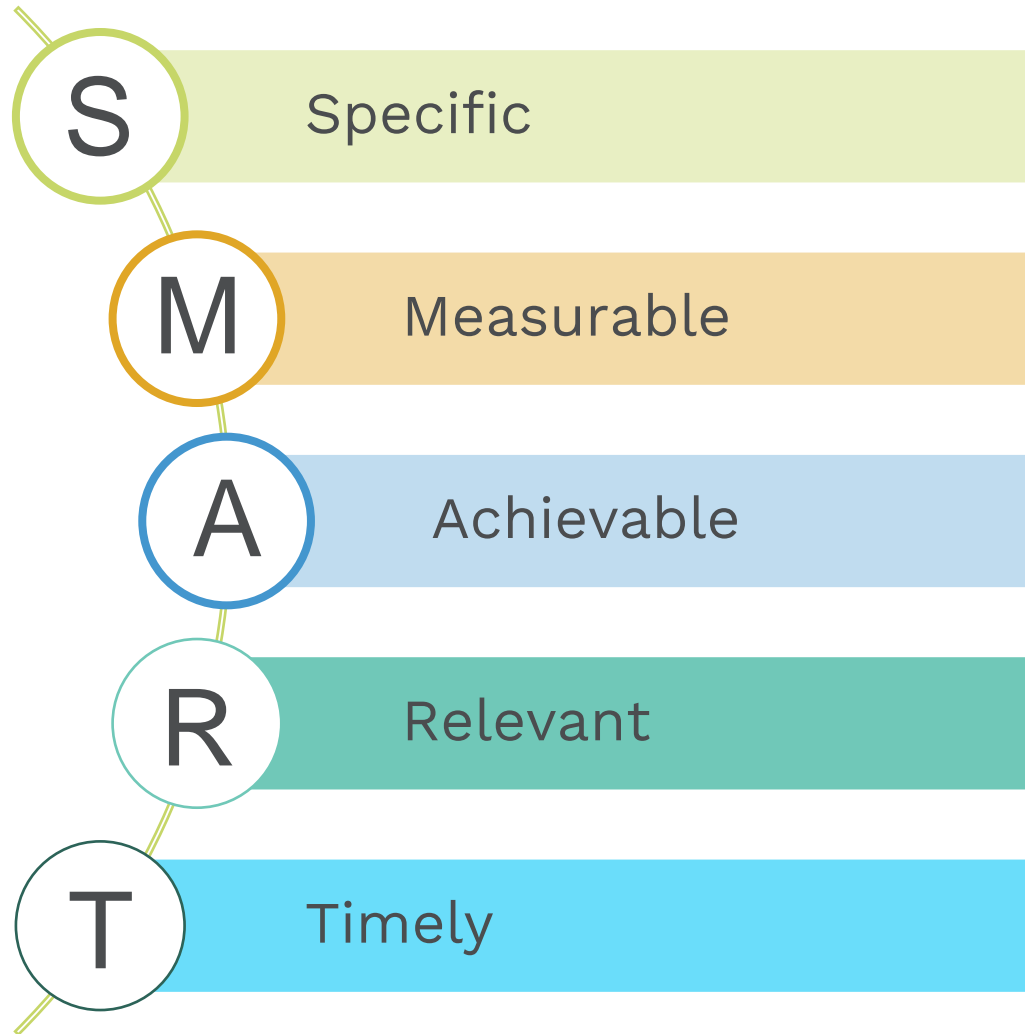
SMART goals are helpful for several reasons:

- ▶ Clarity & focus
- ▶ Measurable progress
- ▶ Realistic planning
- ▶ Accountability
- ▶ Time management
- ▶ Motivation
- ▶ Better choices/decision making
- ▶ Increased success rate



SMART goal elements

**SMART
goals keep
us on track**



Specific

- ▶ A specific goal has a much greater chance of being accomplished than a general goal

- ▶ Sample questions:

- What exactly would you like to accomplish?
- What does success look like to you?
- What small step would make the biggest difference in your health right now?
- Who needs to be involved to help you achieve this?
- Where will you do this activity?

Measurable

- ▶ Establish concrete criteria for measuring progress toward the attainment of each goal set

- ▶ Sample questions

- How will you know when you've reached your goal?
- What numbers or amounts would show progress?
- How many times per week would you like to do this?
- What can we track to show improvement?
- How will you record your progress?

Achievable

- ▶ Identify goals that are important and within reach to the member

- ▶ Sample questions:
 - What resources do you currently have to help you?
 - What might get in the way of achieving this goal?
 - What support do you need to make this happen?
 - Have you done something like this before? What worked?
 - On a scale of 1-10, how confident are you that you can achieve this?

Relevant

- ▶ Represent an objective toward which you are willing and able to achieve

- ▶ Sample questions:

- How does this goal fit into your daily routine?
- What other commitments might affect achieving this goal?
- What makes this goal important to you right now?
- How will your current situation help or hinder this goal?
- What might need to change in your life to make this possible?

Timely

- ▶ Grounded with a specific timeframe

- ▶ Sample questions:

- When would you like to start?
- How long do you think this will take to accomplish?
- What's a reasonable timeframe for checking our progress?
- When would you like to have this completed?
- How often should we review and adjust this goal?

Applying SMART criteria

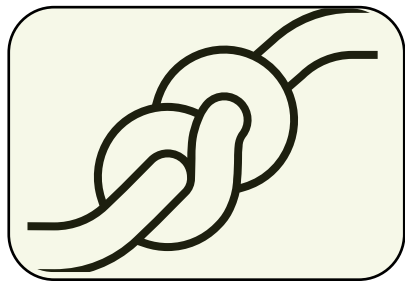
Goal

- ▶ I want to save more money.

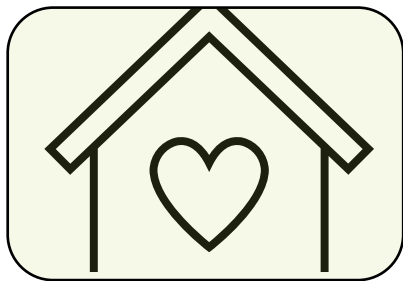
SMART Goal

- ▶ I will save \$800 by the end of 2025 by reducing my monthly dining-out expenses by \$100 and auto-transferring those dollars to my savings account each month.

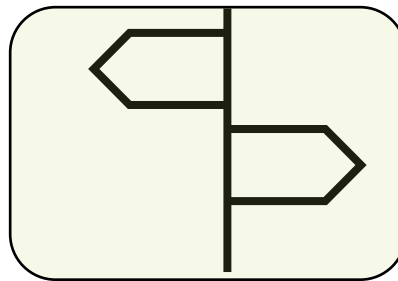
Creating SMART goals that are person-centered



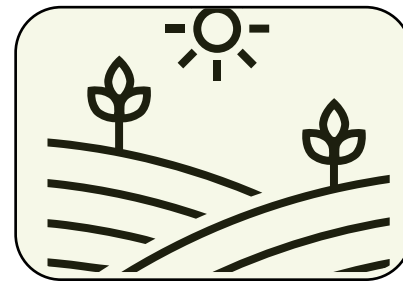
Connect
goals to
personal
values and
interests



Account for
individual
circumstances



Build in
flexibility and
choice



Focus on
personal
growth and
well-being

Richard – Case Study (background)

- ▶ 43 years old and has been using Home Based Habilitation services for several years
- ▶ Lives in his own apartment and gets services about 5 hours/week
- ▶ Preferences – dislikes crowds and social events, uncomfortable around new people, self-described “loner”
- ▶ Annual IDT meeting to update person-centered service plan and goals
 - Review goals from last year and understand any new priorities
 - Quit smoking, doing well mentally and physically
 - Moving forward – continue improvements, focus on exercising and being outdoors and keeping apartment tidy
 - Habilitation provider noted earlier conversation – keeping up on medical care to address risks

Richard Case Study - Goal

Goal: To maintain my physical and mental health by doing things I know make me feel healthier this year.

- ▶ Richard will know he is making progress towards his goal if can self-report feeling healthy.
- ▶ Richard can also measure this by whether he continues to not smoke cigarettes and takes medications regularly
- ▶ Richard may also consult his home-based habilitation provider and medical and mental health providers for support and accountability.

Richard Case Study – Actionable Steps

Action Steps or Objectives:

- ▶ Pick up my apartment daily (e.g., put items away, wipe down counters and tables, take out garbage if needed, etc.).
- ▶ Clean my apartment weekly (e.g., take out trash, clean the bathroom, vacuum and mop floors, etc.)
- ▶ Sort mail weekly
- ▶ Take my medication as prescribed
- ▶ Finish my stop smoking classes
- ▶ Attend medical, dental, and mental health appointments
- ▶ Get outside as much as possible but at least twice a week
- ▶ Exercise at least three times per week (e.g., go for a walk outside twice/week and ride my indoor exercise bike once/week)
- ▶ Buy mostly healthy foods

AI use case

- ▶ Chat GPT prompt: I want to exercise more. Please help me craft a SMART goal.
- ▶ “I will exercise for 30 minutes, 4 times a week, doing a mix of cardio and strength training, for the next 4 weeks; by the end of this time, I want to be able to complete a 5K run without stopping.”
- ▶ Coach the member to refine:
 - I will move my body for 30 minutes, 4 times a week for the next month; by the end of this time, I want to be able to walk 1 mile without stopping.

AI use case #2

► Gemini:

- I want to cook healthier meals at home. Please help me craft a SMART goal.

► Gemini response: To do this effectively, I need a little more information about your current habits and what you'd like to achieve.

- How many meals do you currently eat at home?
- What are some of the main reasons you want to cook healthier meals? (e.g., weight management, energy, dietary needs)
- What are your biggest challenges when it comes to cooking? (e.g., lack of time, feeling uninspired)
- What kind of healthy changes are you most interested in making? (e.g., more vegetables, less processed foods, lower in fat/sugar)

Coach the member to refine:

I will cook at least 3 healthy meals at home each week for the next 4 weeks, using whole ingredients, including at least 2 servings of vegetables in each meal.

I'll track my progress in a meal planner and aim to reduce the number of takeout meals to no more than 1 per week.

Practice!

Think of a member who may benefit from coaching around SMART goals or consider a goal for yourself.

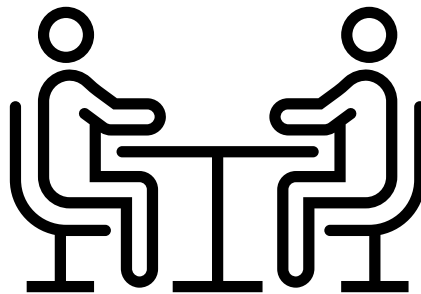
Goal development through coaching

- ▶ Consider your member's individual needs:
 - Preferences and wishes
 - Likes and dislikes
 - Interests and choices
 - Risk factors
- ▶ Has your member indicated an area of improvement interest?
 - Exercise more
 - Eat healthier
 - Take medications more consistently
- ▶ Is there a long-term goal they want to achieve?
 - Be able to travel for a family member's wedding
- ▶ Remember the importance of member involvement and build on their motivation
- ▶ Respect cultural and personal values

Guiding questions

► Additional questions:

- What would make this goal easier to achieve?
- Who in your life can help support you with this?
- What's the first small step we can take?
- What concerns do you have about this goal?
- How will achieving this goal improve your life?



Ongoing coaching

- ▶ Celebrate incremental progress
- ▶ Identify potential obstacles early
- ▶ Connect with appropriate resources
- ▶ Adjust, as needed

Questions

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