

# Creating Goals that Are Easy to Monitor



And a Stress-Free Companion Monitoring Tool  
with Peggy Morris, OTD, OTR/L, BCP & Carlo Vialu, PT, MBA

December 4, 2025, 8:30 am – 3:30 pm ET

Live Online via Zoom

Full \$249 Early Bird \$219 Early Bird Group \$199

Early bird savings end November 14, 2025

*Elevate your therapy practice!*

Are you ready for an easy way to write goals and monitor progress? Whether you are creating goals individually or collaboratively, this workshop will help you set goals that are easy to monitor and design a monitoring tool that can help you decide whether your client is on track, it's time to change the intervention, or it's time to work on more challenging goals.



Stress-free monitoring begins with a well-written goal. While making a goal SMART (Specific, Measurable, Attainable, Relevant, Time-Bound) is a great start, how many times have we written a SMART goal that contained too many conditions to be easy to measure?! So, in the morning, you will learn the 3 Common problems with SMART goals and the 4 Strategies to make your SMART goal easy to monitor. You will practice utilizing Apply EBP's simple worksheet for goal creation with the guidance of your instructors. You will then go through the 3 Steps for the creation of an accompanying data collection system. You will gain 4 Tips for making it user-friendly to different members of the team, and helpful in making informed decisions. You will learn and practice how to use this data collection system in making objective decisions about whether your client is on track, it's time to change the intervention, or it's time to work on more challenging goals.

Finally, Peggy will introduce you to the 5 Steps of the collaborative goal-writing process, and how you can utilize the lessons you learned earlier in the day to collaboratively-written student-centered goals.

Bring sample goals that you need to improve and case vignettes that you find challenging. There will be multiple opportunities to practice goal creation, monitoring, and decision-making, as well as interactive Q&A discussions with the instructors. Leave the day with concrete strategies and the confidence to create goals and monitor them meaningfully!

**Audience:** OTs, OTAs, PTs, PTAs, SLPs & Educators

**Educational Level:** Intermediate

## Learning Objectives

At the completion of this course, attendees will be able to:

1. Create a participation-based/occupation-based goal that is easy to monitor, on a given case study
2. Determine two strategies for creating a simple data collection system for a goal
3. Use the analysis of client data for clinical decision-making, given graphed data of a case scenario

## Your Mentors

**Peggy Morris, OTD, OTR/L, BCP** is an OT with 30+ years of peds experience in early intervention, private practice & out-patient, but most of her experience & passion is in school-based practice. She coordinates the post-professional MS and OTD programs & school-based certificate program at Tufts University. She is Board Certified in Pediatrics through the AOTA, and a regular SeekFreaks contributor.

**Carlo Vialu, PT, MBA** served as Director of Physical Therapy for the NYC Department of Education, where he oversaw a program with over 700 PTs working in more than 1,500 schools. He is the Founder and Director of Continuing Education of Apply EBP, LLC and a co-founder of [SeekFreaks](#), and evidence-informed online resource. Carlo has presented nationally and internationally on various pediatric topics, including motor learning, assessment, decision-making, and school-based practice.

Disclosures: Peggy receives a speaking fee from Apply EBP, LLC. She has no relevant nonfinancial relationships to disclose. Carlo is the owner of Apply EBP, LLC, and receives a speaking fee from Apply EBP, LLC. He has no relevant nonfinancial relationships to disclose.

## Registration

For more info and registration

[Click here!](#)

Or contact Carlo at

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## Agenda

The following is in **Eastern Time**. Note you may be in a different time zone.

- 8:30 am Goals that Are Easy to Monitor (lecture, interactive discussion)
  - SMART interactive review: a good place to start
  - 3 Common problems with SMART goals
  - 4 Strategies to make SMART goals easy to monitor
- 10:00 am Break
- 10:10 am Using the Goals that Are Easy to Monitor Worksheet (lecture, group activities, and interactive discussion)
  - Modeling the use of the Worksheet for creating goals that are easy to monitor
  - Your turn to practice
- 11:10 am Break
- 11:20 am Discussing improved SMART goals (interactive discussion)
- 12:00 pm Lunch (on your own)
- 12:30 pm Monitoring and Decision-Making Tool (lecture, activities, interactive discussion)
  - Accountability and progress monitoring
  - 4 Tips for creating your monitoring tool
  - 3 Steps to creating your monitoring tool
  - Concrete strategy for using your monitoring tool to make informed decisions
  - Your chance to practice
- 2:00 pm Break
- 2:10 pm More Discussions on Monitoring and Decision-Making (interactive discussion)
- 3:00 pm Collaborative Goal-Writing (lecture)
- 3:20 pm Reflections and Action Plan (interactive discussion)
- 3:30 pm Adjourn

Cancellation policy: Registrants may cancel up to 14 days prior to the course for a refund minus a \$75 administration fee. There is no cancellation less than 14 days prior to the course; you can find a substitute or use your registration to attend a future Apply EBP course. There is no cancellation or substitution after you have received any course material; you can use your registration to attend a future presentation of the same course. Email [applyebp@gmail.com](mailto:applyebp@gmail.com) to request to cancel. Apply EBP reserves the right to cancel a course up to 14 days prior to the course due to insufficient registration, with a full refund to registrants. Please do not arrange non-refundable travel arrangements until 13 days prior to the course, as Apply EBP is not responsible for such expenses.

Accommodation: Email or call 2 weeks prior to the course for any requests for accommodation.

## CEUs

6 hours of continuing education training are awarded to learners who complete this course

### For OTs and OTAs

- You will receive 0.6 AOTA CEUs for this course



### For PTs and PTAs

- Apply EBP, LLC is an approved provider of CEUs in IL, NM, NY, OK, and TX (APS #: 2703055TX)
- This course is approved in CA, MD (#2022-480 thru 5/5/26) and NJ (#2204-87 thru 1/31/26).
- These PT state boards accept approval by other states boards or state associations: AK, AZ, DC, DE, FL, HI, IN, KY, MA, MI, MT, NC, ND, OR, PA, RI, SC, SD, TN, UT, VT, VA, WI & WY.
- These states do not require pre-approval of courses or have no CE requirements: AL, CO, CT, GA, IA, ID, ME, MO, NE, NH & WA.

## ASHA CEUs

- 0.6 ASHA CEUs | Intermediate Level



- ASHA CE Provider approval and use of the Brand Block does not imply endorsement of course content, specific products or clinical procedures

### For Teachers

- Apply EBP is an approved sponsor of CTLE for educators in New York State (#23827)

If you would like to obtain CEUs for another state, please email [carlo@applyebp.com](mailto:carlo@applyebp.com).