

Creating Goals that Are Easy to Monitor



And a Stress-Free Companion Monitoring Tool

with Peggy Morris, OTD, OTR/L, BCP, Beth Gardner, MA, CCC-SLP
and Carlo Vialu, PT, MBA

October 30, 2026, 8:30 am – 3:30 pm ET

Live Online via Zoom

Full \$279 Early Bird \$239 Early Bird Group \$199

Early bird savings end October 9, 2026

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

Registration:

For more info and registration

[Click here!](#)

Or contact Carlo at

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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.

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 a co-founder of [SeekFreaks](#), and evidence-informed online resource.

Beth Gardner, MA, CCC-SLP has over 10 years of experience working in preschool, early intervention, and outpatient settings. She serves as an early intervention team lead, mentor for graduate students, and is a past President of the Ohio Division for Early Childhood.

Disclosures: Peggy & Beth receive speaking fees from Apply EBP, LLC. They have 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.

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

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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 (#2512-133 thru 1/31/28).
- 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, UT, VT, VA, WI & WY.
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ASHA CEUs

- 0.6 ASHA CEUs | Intermediate Level



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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.