

Individualized Service Plan Short and Long-Term Goals

Short – Term Goals

Action-oriented goals with individualized indicators appropriate for your program.

Example Short-Term Goal:

Teresa will increase her Math grade by 3% points from 75% to at least 78% by March 1, 2019.

Example Questions for Short-Term Goals

- ! What specifically would you like to accomplish?
- ! What is your situation now, and what do you want to be different 3 months from now?

Long-Term Goals

Develop a statement with the client about his/her hopes, wishes, and/or intentions for the future. If possible, help client connect their short-term goals and objectives with their larger vision for the future.

Example Long-Term Goal:

Teresa will graduate high school and continue her studies to become a nurse.

Example Questions for Long-Term Goals

- ! What do you want your future to look like?
- ! How will you notice when things are on track to the future you want?
- ! What needs to happen for your future to become what you want it to be?

Individual Service Plan for Achieving Short-Term Goals

Example Steps/Tasks:

Teresa will attend Math tutoring sessions 3x/week on Tuesdays and Fridays for the next 3 months. She will meet with case manager on weekly basis to report progress and request additional assistance.

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Documenting Progress S.O.A.P.D.

Key Concepts

Progress notes tell the story of your interactions with and on behalf of clients. They document what has been accomplished and point the way to what still needs to be done.

- ! Provide assessment of progress toward goals/concerns identified in service plan
- ! Thorough, yet concise
- ! Written soon after interaction with client to ensure accuracy
- ! Connect client's strengths and progress back to the stated goals
- ! Use respectful language and avoid slang
- ! Describe direct observations, not opinions
- ! Proofread for all spelling and grammar

Strengths observed

Objective account of interaction

Assessment of the situation/individual
Plan (progress toward specific goal)

Data/New information gathered

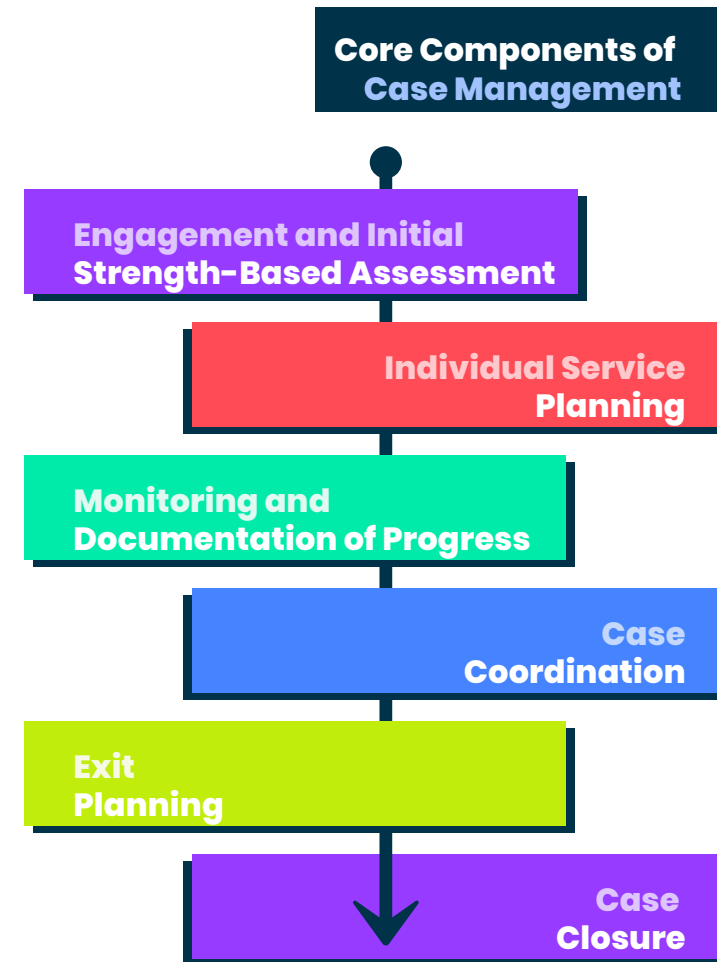
Litmus Test for a Good Progress Note

- ! When I am unable to be present, a colleague can open the record and easily figure out the next step to help the client achieve his/her goals.
- ! If my client read the note, he/she would feel respected and would agree with my objective account of our interaction.

This document is designed as a resource guide for DYCD-funded programs for providing case management services and documentation to clients. For further support, please refer to the Case Management Standards Toolkit.

Case Management Standards Desk Guide

A practical guide for supporting clients in reaching their goals



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Engagement and Initial Assessment

Key Concepts

- ! Strength-Based
- ! Culturally Competent
- ! Interactive
- ! Individualized
- ! Professionally Responsible

Components to Include in a Written Assessment

- ! Basic demographic information
- ! Relevant background and history
- ! Strengths and resources of client
- ! Challenge(s) requiring services
- ! Identified barriers
- ! Eligibility for program services

Example Questions to Ask

- What brings you here today?
- What do you like to do?
- What should I know about you?
- What will be different in your life if you are successful in this program?
- Who/what do you find to be helpful to you?
- What are you good at?
- How can this program be helpful to you?
- What do you hope for in your future?
- What challenges are you facing?
- How long have you been managing these challenges?
- How have you handled challenges in the past?
- Tell me how things were before this challenge.

Tips for Conducting Strength-Based Assessment

Key Concepts

- ! Friendly conversation, not interrogation
- ! Actively listen to client's perspectives and experiences and take their ideas seriously
- ! Notice something positive about the person and say it. Highlight strengths.
- ! Before starting, ask yourself if you are expecting strengths, not just challenges
- ! Gather information conversationally
- ! Be not-knowing and curious
- ! Use client's words/language and weave into conversation
- ! Avoid blaming, diagnosing, or labeling

Example Questions to Elicit Strengths

- Resilience:** How have you managed to overcome/survive the challenges that you have faced? What have you learned about yourself during those times?
- Support:** Who are the people that you can rely on? Who makes you feel understood, supported, or encouraged?
- Exception:** When things were going better in your life, what was different?
- Esteem:** What do you feel proud of? What positive things do other people say about you?
- Perspective:** What are your ideas about your current situation?
- Change:** What do you think is necessary for things to change? What could you do to make it happen?

Written Individual Service Plan S.M.A.R.T.S

Key Concepts

Written with clear milestones, methods and person responsible for completing tasks.

- ! Milestones = Clear incremental steps toward achieving short term goal
- ! Methods = How will the milestones/tasks be accomplished?
- ! Person Responsible = Who will accomplish the tasks associated with the milestones?

Specific: Clearly specify what client wants to achieve

Measurable: You and the client can measure whether goal is being achieved by setting tangible milestones for progress

Achievable: Goals, objectives and tasks are possible and attainable

Realistic: Client can realistically accomplish these tasks with the resources that (s)he has

Time-framed: Clear timeframe is developed for each goal, objective, and task

Strength-based: Client's strengths and resources are used in developing goals, objectives and tasks

Example of written S.M.A.R.T.S. Goals with Steps and Tasks:

- **Subject/Verb:** Xavier will
- **Action/Object:** improve his Science grade from a 70% to an 80% by attending tutoring sessions
- **Frequency:** 2x/week from 3-5 p.m.
- **Duration:** from January 1st – April 1st.