Indian Health Service

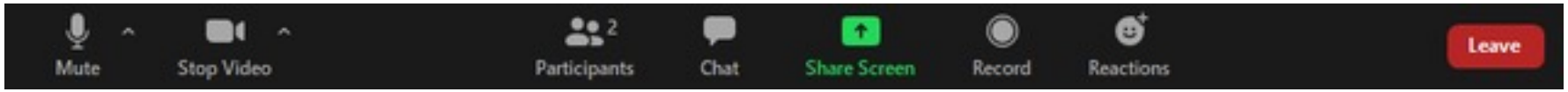
Indian Health Service Evaluation Services Urban 4-in-1 Evaluation

S.M.A.R.T OBJECTIVES ASSISTANCE WEBINAR

PRESENTED BY KAUFFMAN & ASSOCIATES, INC. (KAI)

Instructions For Participating

- The participant controls appear at the bottom of your screen



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  - **Rename:** Change how your screen name is displayed to other participants.
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Instructions For Participating

- Join audio—all lines will be muted upon entry
- Dial in by phone

  +1 669 254 5252 U.S. (San Jose)
  +1 646 828 7666 U.S. (New York)
  +1 669 216 1590 U.S. (San Jose)
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- Press *6 to mute/unmute
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Today's Meeting ID:
160 660 5412

Passcode: 013404

Disclaimer

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Indian Health Service Evaluation services Urban 4-In-1 Evaluation

JUNE 22, AT 12 P.M. EASTERN

Presenter Introductions

Katie Visnius, BS

KAI's Moderator

Julie Cahoon, MPH

Subject Matter Expert

Purpose

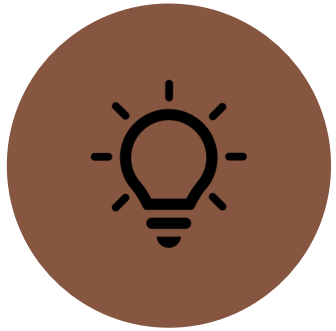
1. Support improvements with quarterly reporting
   - The first two webinars are now posted on the IHS website

2. Support to development an articulation of SMART objectives and align these with target and actual reporting

3. Review use of the grantee technical assistance request form to submit questions about the quarterly reporting template

Objectives

Highlight the importance of SMART objectives to inform accurate reporting of progress on grant objectives



Conduct working sessions with grantees and provide training on SMART objectives

Demonstrate use of the grantee technical assistance request form via Smartsheet

Background

4-in-1 Grant

Title V of the IHCIA (PL 94-437) authorized funding for development of health programs in urban areas to make health services more accessible to urban Indians.

Quarterly Progress Reporting

4-in-1 grantees are required to provide quarterly progress updates on goals, objectives, measures, services, and program changes for each of the four program areas described in their application, including their unmet needs and recommendations.

Overview of the Revised Quarterly Report Form

The revised form makes it possible to:

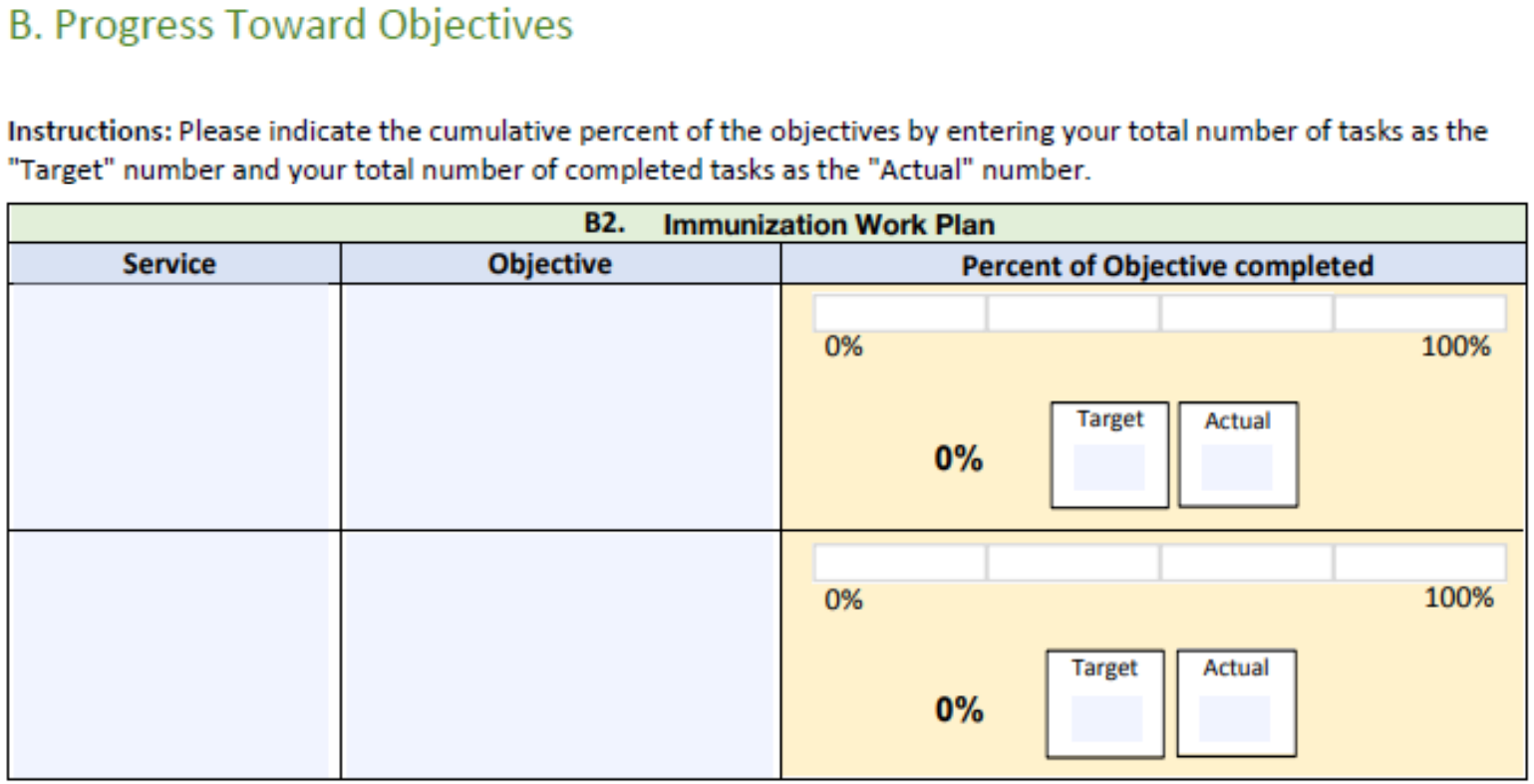
- Report progress updates and unmet needs on one fillable electronic form
- Track objectives in a quantifiable way
- Track progress throughout the grant year
- Collect meaningful outcome data to evaluate the 4-in-1 grant program

Overview of the Revised Quarterly Report Form (continued)

- Instructions for completing the form are clear
- Text boxes now have character limits
- Form sections are more clearly outlined
- More inclusive reporting on a single form
  - Section A2. Unmet Needs
  - Section A3. Recommendations
  - Section C. Program Approaches

Overview of SMART Objectives in the Quarterly Report Form

- B1. HP/DP
- B2. Immunization
- B3. Alcohol/Substance Abuse
- B4. Mental Health



B. Progress Toward Objectives

Instructions: Please indicate the cumulative percent of the objectives by entering your total number of tasks as the "Target" number and your total number of completed tasks as the "Actual" number.

B2. Immunization Work Plan		
Service	**Objective**	**Percent of Objective completed**
		0% 100% **0%** Target Actual
		0% 100% **0%** Target Actual

Goal VS. Objective:

Goal	Objective
• A broad statement about the long-term expectation of what should happen as a result of your program (the desired result). • Serves as the foundation for developing your program objective(s). • **Example:** Protect AI/ANs from vaccine preventable diseases.	• Statements describing the results to be achieved and how they will be achieved. • **Example:** By the end of quarter 4, increase the percentage of vaccinations to AI/ANs in X county from 20% baseline to 45%.

Overview of SMART Objectives

S	M	A	R	T
Specific	**Measurable**	**Attainable**	**Relevant**	**Time-based**
Set real numbers with deadlines for more effective planning	Define what evidence will prove you're making progress	Make sure you can reasonably accomplish your goals within a certain timeline	Your goals should align with your team's values and long-term goals	Set a realistic, ambitious end-date for task prioritization and motivation

Example 1: SMART Objective (HP/DP)

Sample detailed SMART Objective #1:

HPDP: Collaborate and establish MOUs with 10 organizations in the community by March 31, 2023

Specific
- Who: MOUs in the community
- What: Collaborating and establishing MOUs

Measurable
- How many? 10
- Documented by: MOUs

Attainable
- How does 10 compare to last year? Is March 31st attainable?

Relevant
- Success of the HP/DP program is partly dependent on collaboration and MOUs with partners

Time-Based
- When: By March 31, 2023

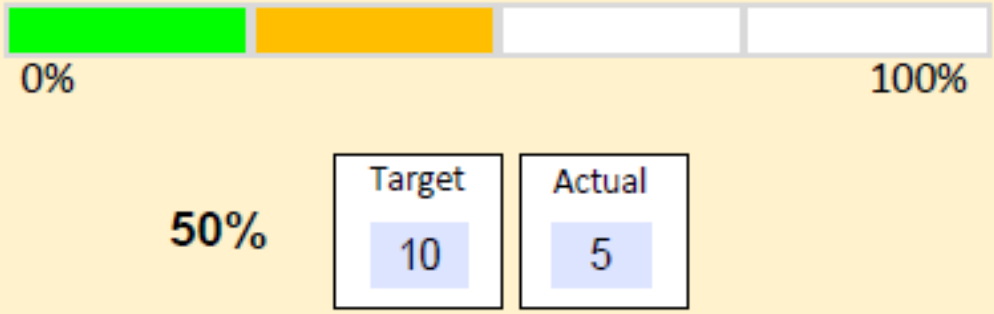
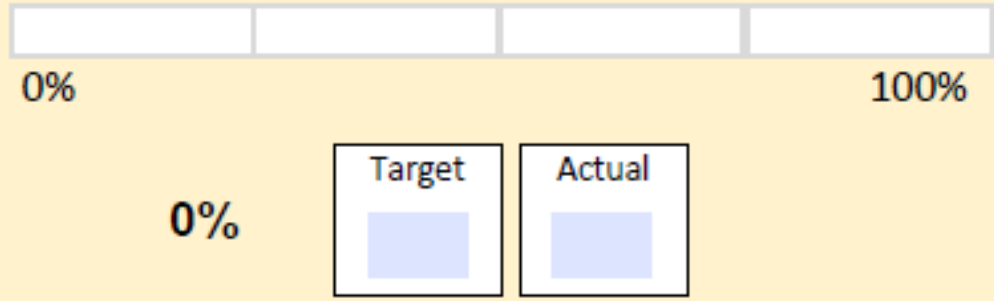
Example 1: SMART Objective (HP/DP) – Quarter 1 Reporting

Instructions: Please indicate the cumulative percent of the objectives by entering your total number of tasks as the "Target" number and your total number of completed tasks as the "Actual" number.

B1. HP/DP Work Plan		
Service	**Objective**	**Percent of Objective completed**
Partnerships	Collaborate and establish MOUs with 10 organizations in the community by March 31, 2023.	0% 100% **20%** Target 10 Actual 2
		0% 100% **0%** Target Actual

Example 1: SMART Objective (HP/DP) – Quarter 2 Reporting

Instructions: Please indicate the cumulative percent of the objectives by entering your total number of tasks as the "Target" number and your total number of completed tasks as the "Actual" number.

B1. HP/DP Work Plan		
Service	**Objective**	**Percent of Objective completed**
Partnerships	Collaborate and establish MOUs with 10 organizations in the community by March 31, 2023.	
		

Example 1: SMART Objective (HP/DP) – Quarter 3 Reporting

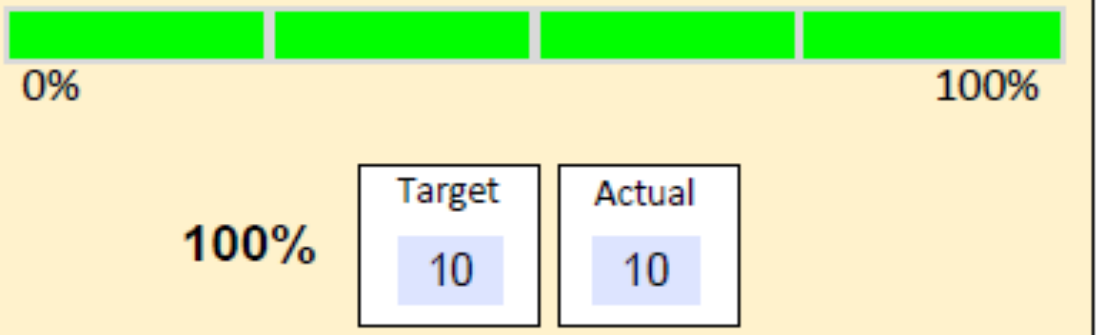
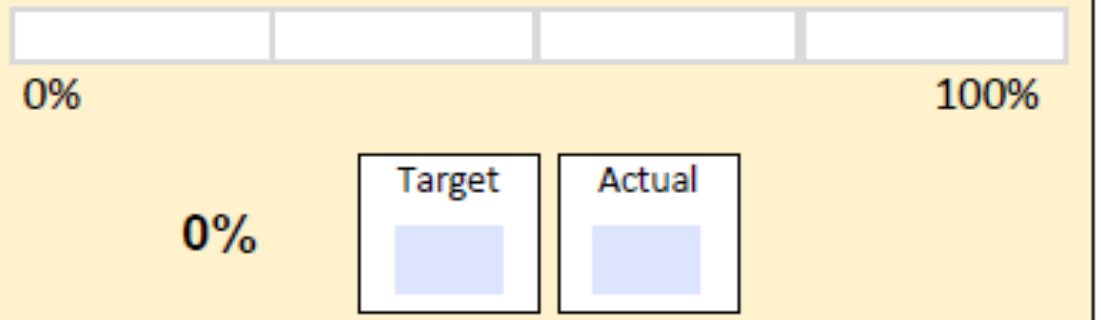
Instructions: Please indicate the cumulative percent of the objectives by entering your total number of tasks as the "Target" number and your total number of completed tasks as the "Actual" number.

B1. HP/DP Work Plan		
Service	**Objective**	**Percent of Objective completed**
Partnerships	Collaborate and establish MOUs with 10 organizations in the community by March 31, 2023.	0% 100% **90%** Target 10 Actual 9
		0% 100% **0%** Target Actual

Example 1: SMART Objective (HP/DP) – Quarter 4 Reporting

Instructions: Please indicate the cumulative percent of the objectives by entering your total number of tasks as the "Target" number and your total number of completed tasks as the "Actual" number.

B1. HP/DP Work Plan

Service	Objective	Percent of Objective completed
Partnerships	Collaborate and establish MOUs with 10 organizations in the community by March 31, 2023.	
		

Example 2: SMART Objective (Immunization)

Sample detailed SMART Objective #2:

Immunization: Provide vaccines to ensure that at least 75% of patients (N=5,000) ages 0–15 months are up to date with their immunization schedule by March 31, 2023.

Specific

- Who: Patients, aged 0-15 months
- What: # of patients vaccinated

Measurable

- How many? 75% of 5,000 patients
- Documented by: Immunization logs

Attainable

- Resources, including human immunization supply

Relevant

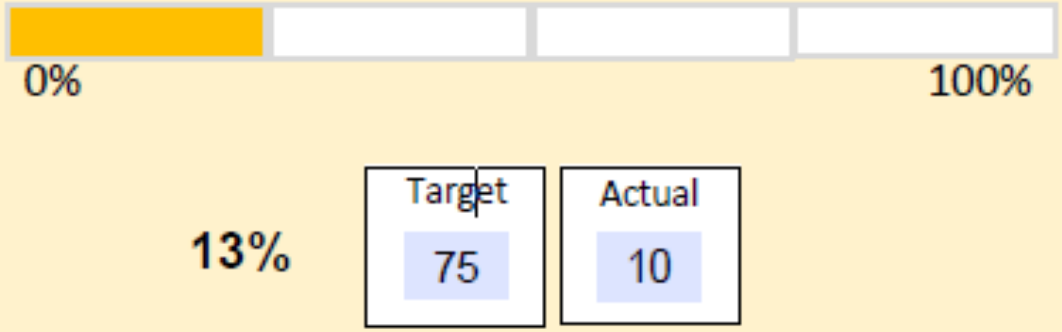
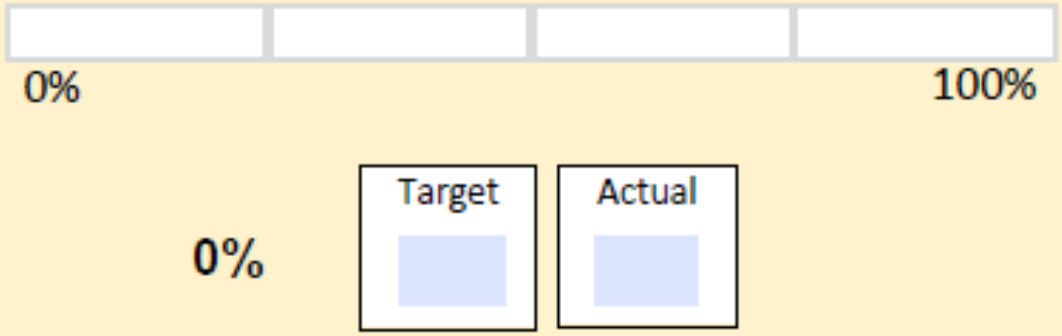
- Preventable childhood diseases

Time-Based

- When: By March 31, 2023

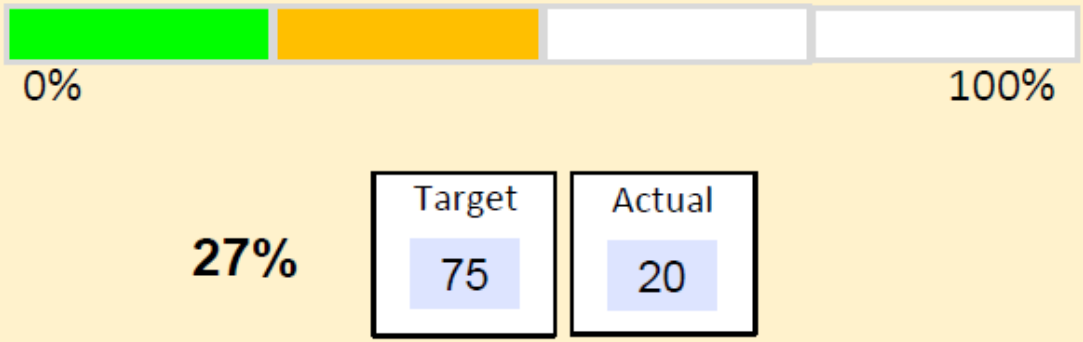
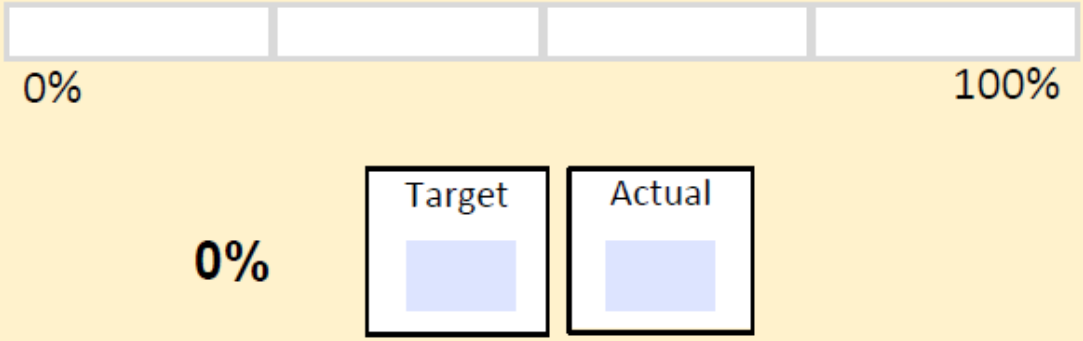
Example 2: SMART Objective (Immunization)- Quarter 1 Reporting

B. Progress Toward Objectives

B2. Immunization Work Plan		
Service	**Objective**	**Percent of Objective completed**
Infant immunizations	Provide vaccines to ensure that at least 75% of patients (N=5,000) ages 0–15 months are up to date with their immunization schedule by March 31, 2023.	
		

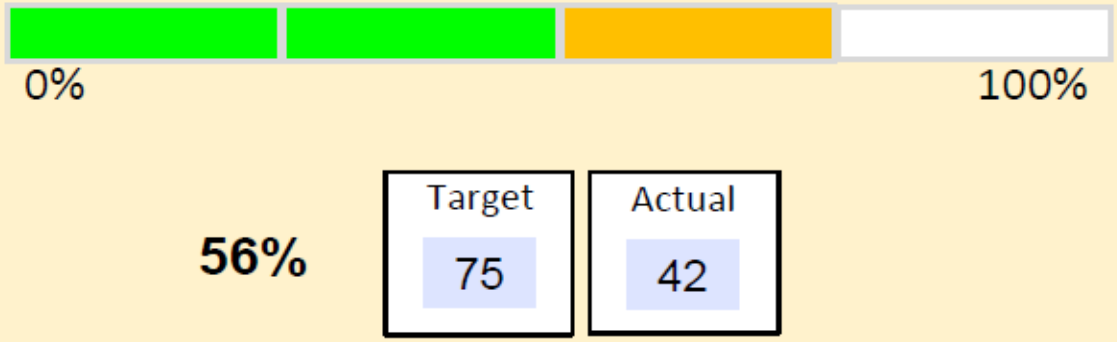
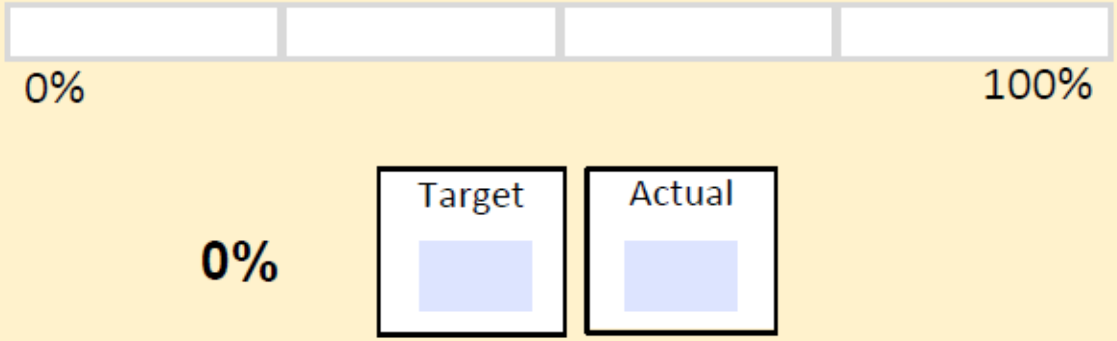
Example 2: SMART Objective (Immunization)- Quarter 2 Reporting

B. Progress Toward Objectives

B2. Immunization Work Plan		
Service	**Objective**	**Percent of Objective completed**
Infant immunizations	Provide vaccines to ensure that at least 75% of patients (N=5,000) ages 0–15 months are up to date with their immunization schedule by March 31, 2023.	
		

Example 2: SMART Objective (Immunization)- Quarter 3 Reporting

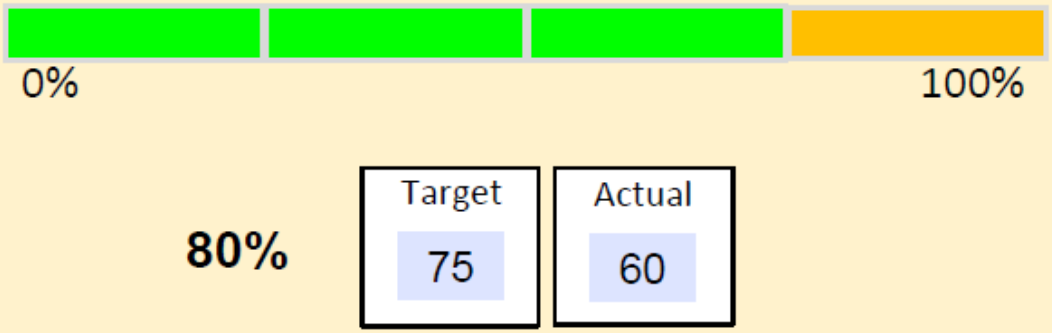
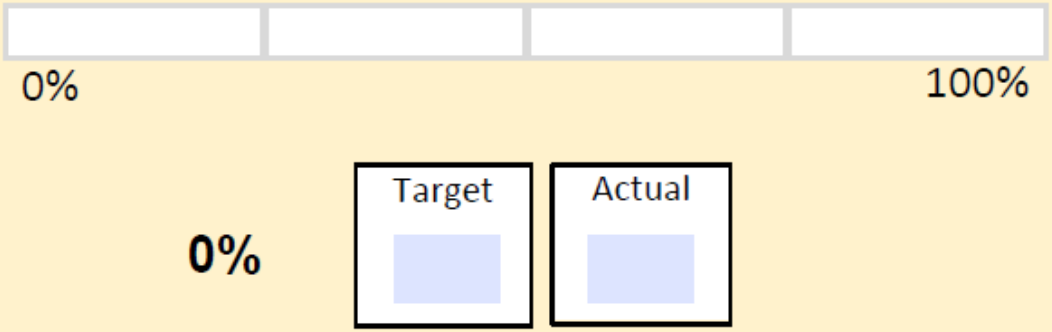
B. Progress Toward Objectives

B2. Immunization Work Plan		
Service	**Objective**	**Percent of Objective completed**
Infant immunizations	Provide vaccines to ensure that at least 75% of patients (N=5,000) ages 0–15 months are up to date with their immunization schedule by March 31, 2023.	
		

Example 2: SMART Objective (Immunization)- Quarter 4 Reporting

B. Progress Toward Objectives

B2. Immunization Work Plan

Service	Objective	Percent of Objective completed
Infant immunizations	Provide vaccines to ensure that at least 75% of patients (N=5,000) ages 0–15 months are up to date with their immunization schedule by March 31, 2023.	
		

Example 3: SMART Objective (Alcohol/ Substance Abuse)

Alcohol/Substance: Provide culturally relevant alcohol and substance abuse related therapy sessions to at least 40 clients by the end of March 31, 2023.

Specific
- Who: Behavioral health clients/patients
- What: Culture-based alcohol and substance abuse therapy session

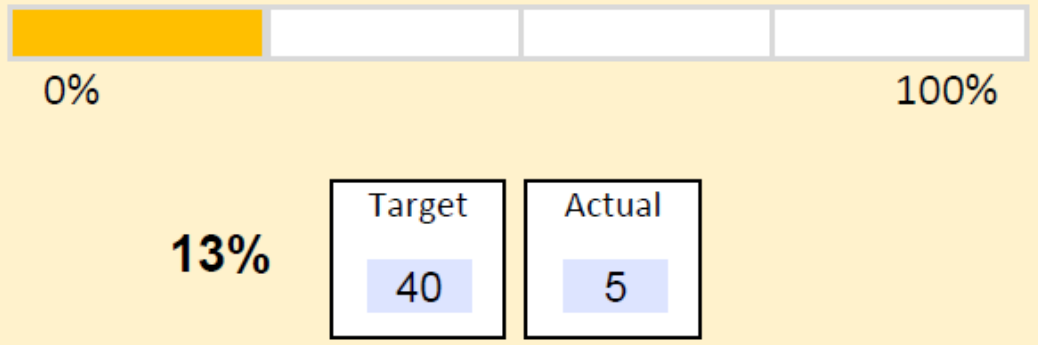
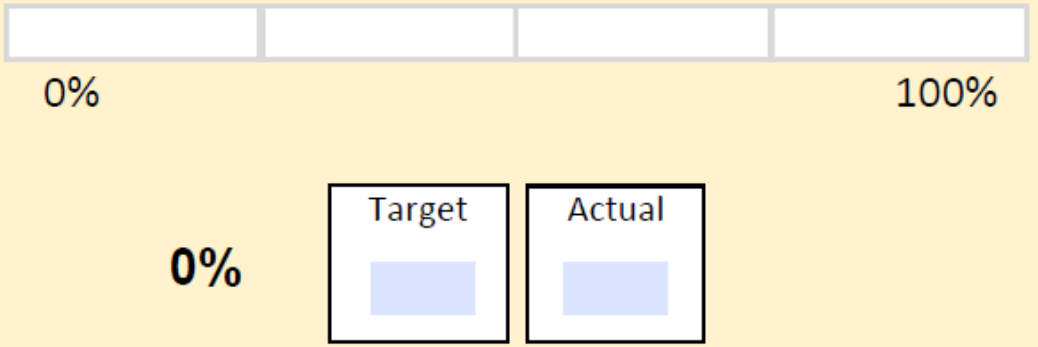
Measurable
- How many? 40 individual clients
- Documented by: Session registration records

Attainable
- Compared to last year, this is an increase in 5 individual new clients for the year

Relevant
- Aligns to support increasing access to culturally-relevant services and support for substance abuse

Time-Based
- When: March 31, 2023

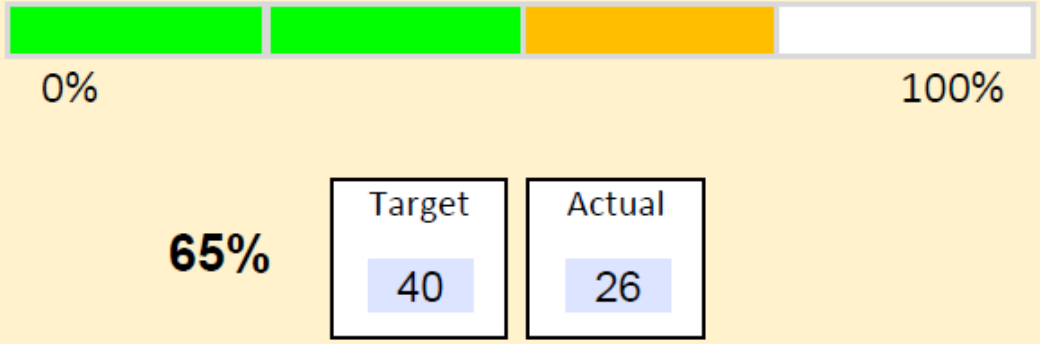
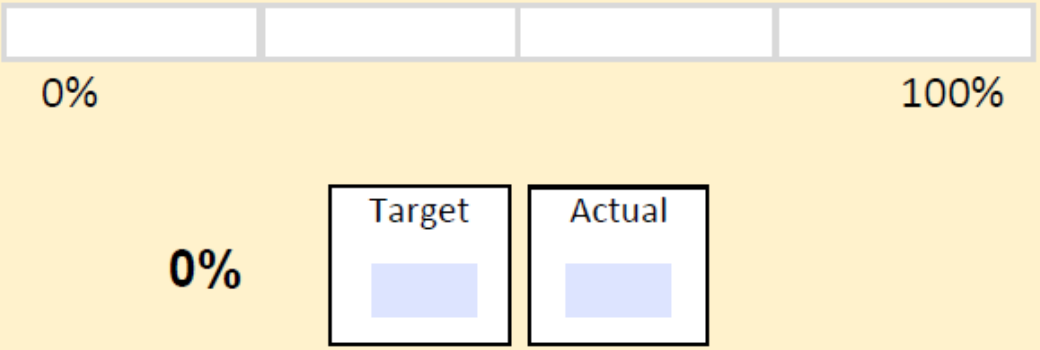
Example 3: SMART Objective (Alcohol/ Substance Abuse)- Quarter 1 Reporting

B3. Alcohol/Substance Abuse Work Plan		
Service	**Objective**	**Percent of Objective completed**
Alcohol/Substance Abuse	Provide culturally relevant alcohol and substance abuse related therapy sessions to at least 40 clients by the end of March 31, 2023.	
		

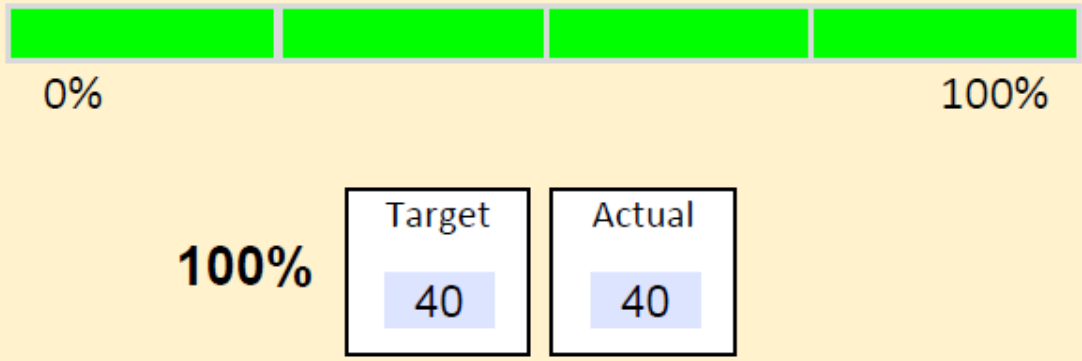
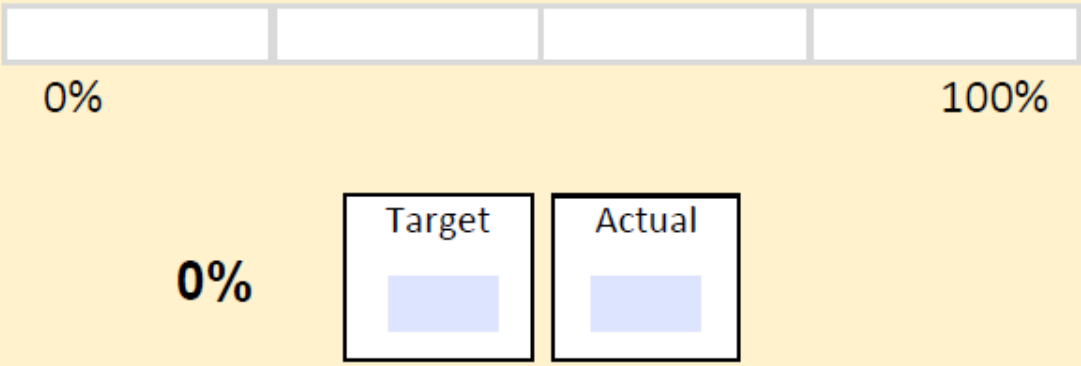
Example 3: SMART Objective (Alcohol/ Substance Abuse)- Quarter 2 Reporting

B3. Alcohol/Substance Abuse Work Plan		
Service	**Objective**	**Percent of Objective completed**
Alcohol/Substance Abuse	Provide culturally relevant alcohol and substance abuse related therapy sessions to at least 40 clients by the end of March 31, 2023.	0% 100% **30%** Target 40 Actual 12
		0% 100% **0%** Target Actual

Example 3: SMART Objective (Alcohol/ Substance Abuse)- Quarter 3 Reporting

B3. Alcohol/Substance Abuse Work Plan		
Service	**Objective**	**Percent of Objective completed**
Alcohol/Substance Abuse	Provide culturally relevant alcohol and substance abuse related therapy sessions to at least 40 clients by the end of March 31, 2023.	
		

Example 3: SMART Objective (Alcohol/ Substance Abuse) Quarter 4 Reporting

B3. Alcohol/Substance Abuse Work Plan		
Service	**Objective**	**Percent of Objective completed**
Alcohol/Substance Abuse	Provide culturally relevant alcohol and substance abuse related therapy sessions to at least 40 clients by the end of March 31, 2023.	
		

Example 4: SMART Objective (Mental Health)

Mental Health: By the end of the grant year (March 31, 2023), we anticipate interacting and providing mental health information to at least 350 individuals in our community during local community social events.

Specific

- Who: local community members/event attendees
- What: mental health information

Measurable

- How many? 350 individual community members
- Documented by: the number of community members who provide contact information on an event sign-in sheet

Attainable

- Quick, easy to track during events

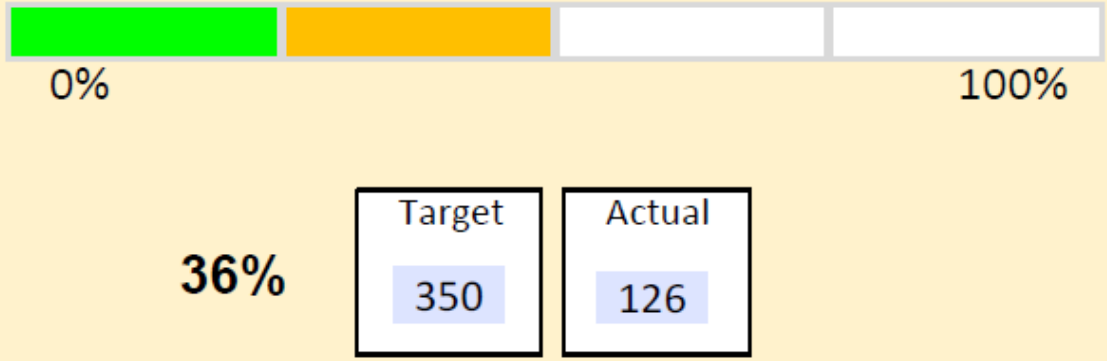
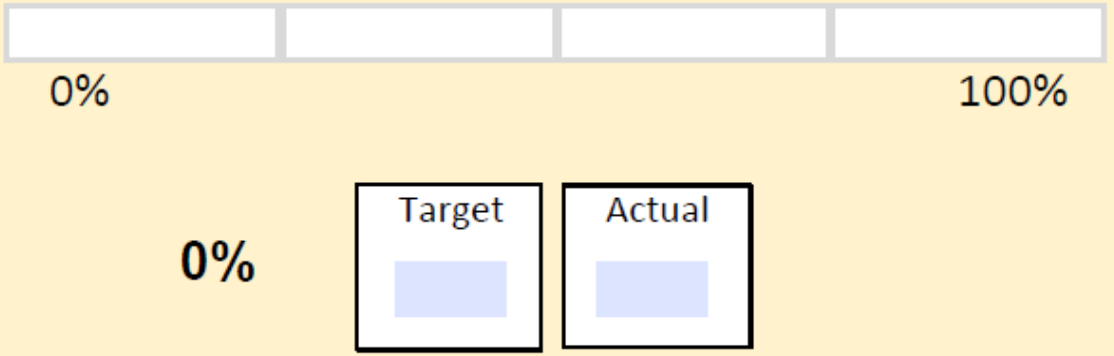
Relevant

- Broadening reach to increase mental health awareness in the community

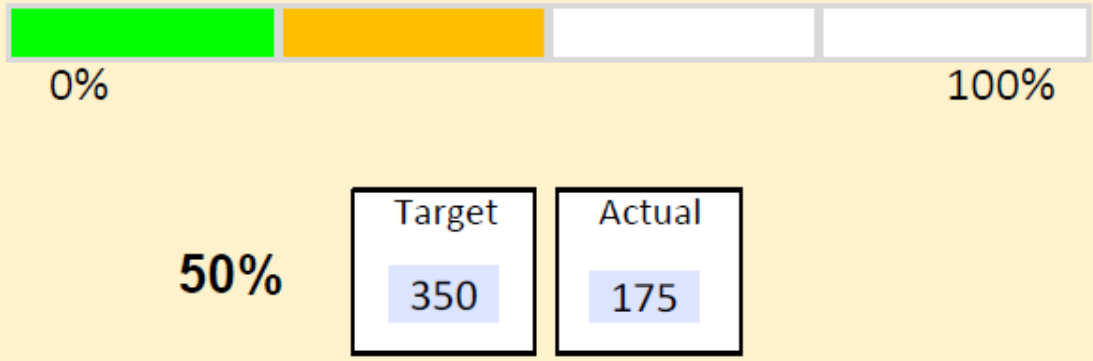
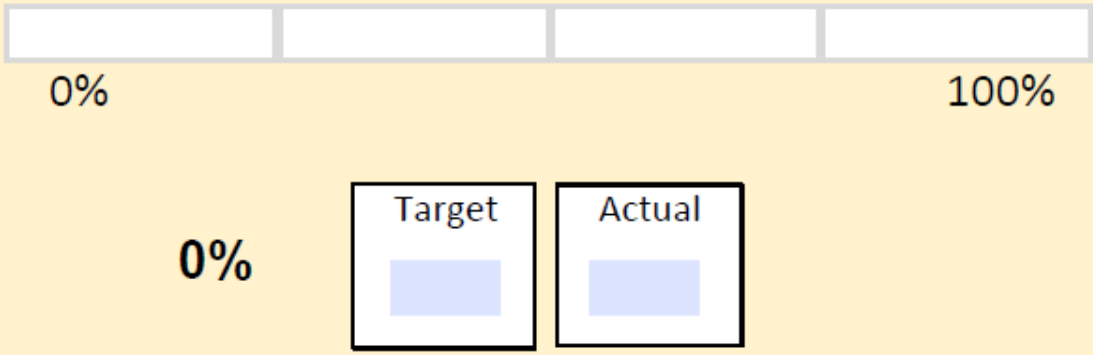
Time-based

- When: By March 31, 2023

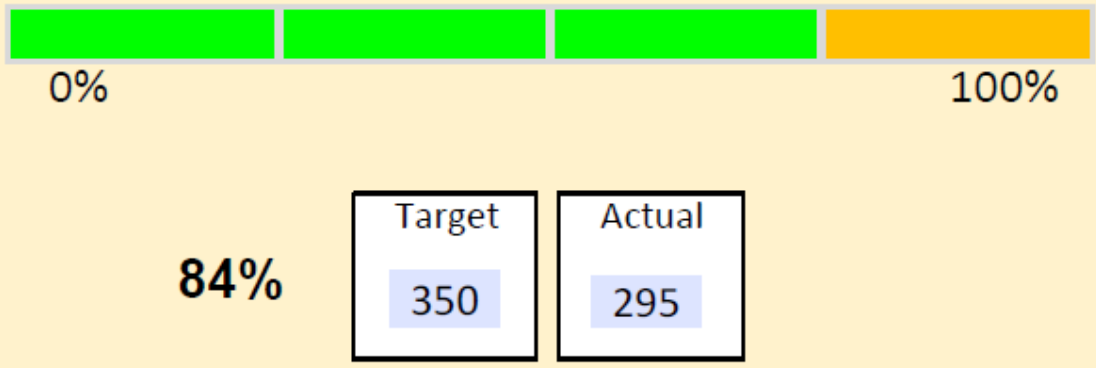
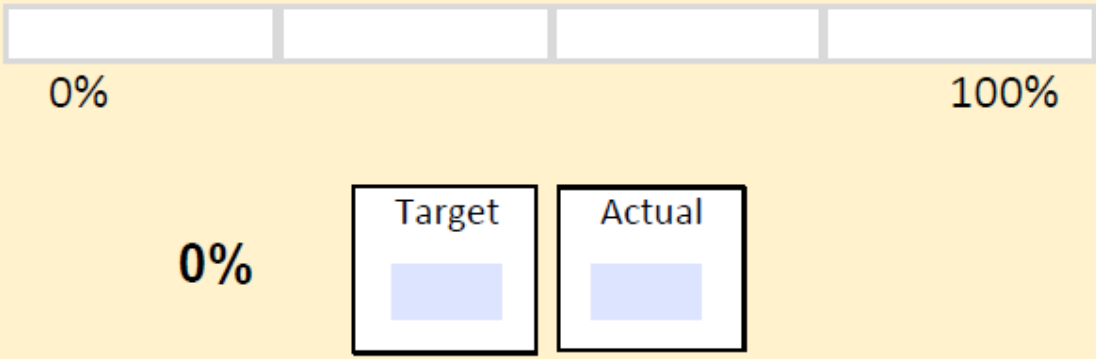
Example 4: SMART Objective (Mental Health)- Quarter 1 Reporting

B4. Mental Health Work Plan		
Service	**Objective**	**Percent of Objective completed**
Mental Health	By the end of the grant year (March 31, 2023), we anticipate interacting and providing mental health information to at least 350 individuals in our community during local community social events.	
		

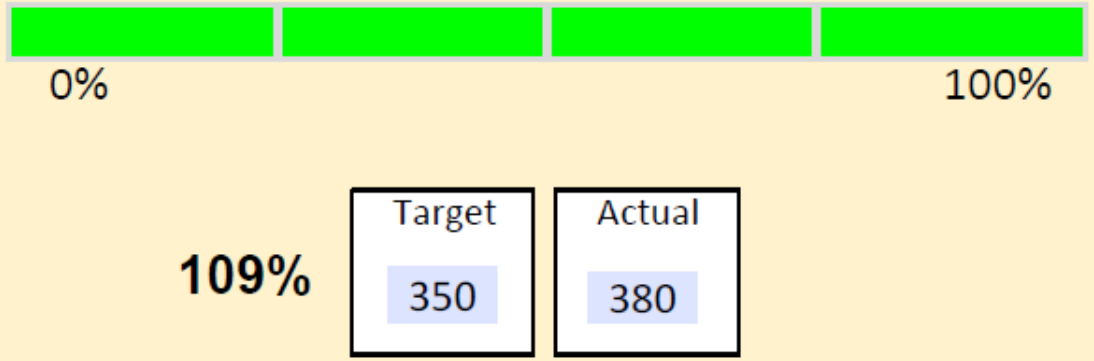
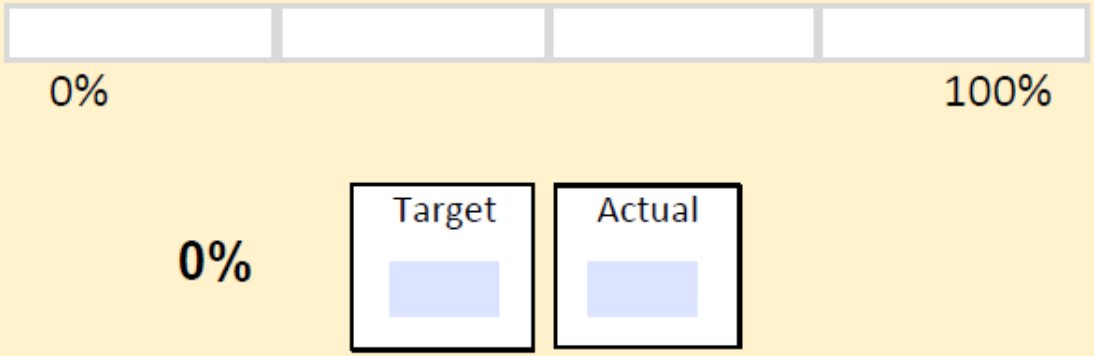
Example 4: SMART Objective (Mental Health)- Quarter 2 Reporting

B4. Mental Health Work Plan		
Service	**Objective**	**Percent of Objective completed**
Mental Health	By the end of the grant year (March 31, 2023), we anticipate interacting and providing mental health information to at least 350 individuals in our community during local community social events.	
		

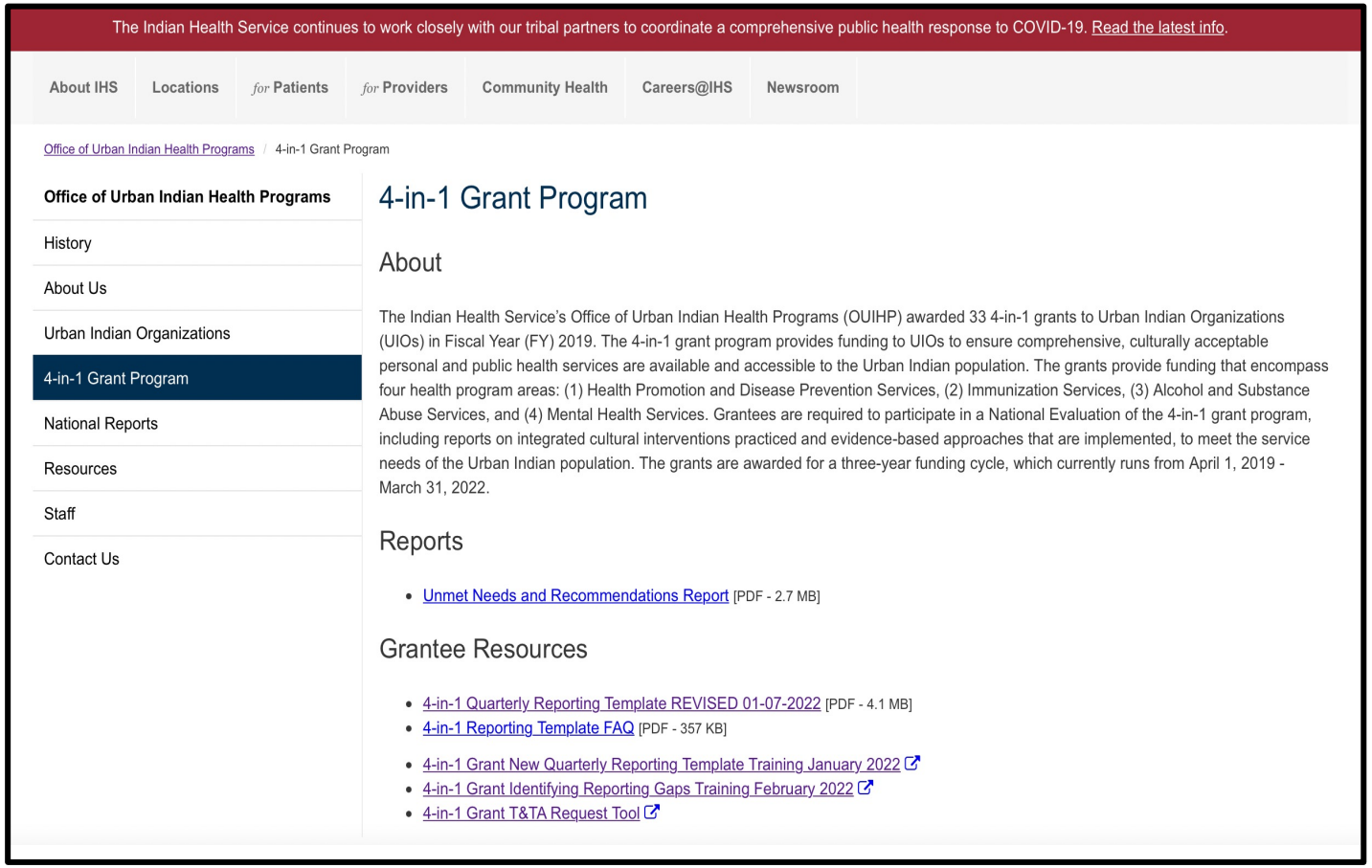
Example 4: SMART Objective (Mental Health)- Quarter 3 Reporting

B4. Mental Health Work Plan		
Service	**Objective**	**Percent of Objective completed**
Mental Health	By the end of the grant year (March 31, 2023), we anticipate interacting and providing mental health information to at least 350 individuals in our community during local community social events.	
		

Example 4: SMART Objective (Mental Health)- Quarter 4 Reporting

B4. Mental Health Work Plan		
Service	**Objective**	**Percent of Objective completed**
Mental Health	By the end of the grant year (March 31, 2023), we anticipate interacting and providing mental health information to at least 350 individuals in our community during local community social events.	
		

The Process of Downloading the Quarterly Report



- The quarterly reporting template is located on the IHS website under the 4-in-1 Grant Program section below Grantee Resources
- Download it as a PDF
- Save it to your computer
- Open in Adobe Reader and enter your information

Demonstration: Adding Supplemental Documents

How to add supplemental documents if you have Adobe Acrobat Pro

Combine

Combine all supplemental documents into one PDF by going to “Tools” and choosing “Combine Files.” Select the files you wish to combine.

Name

Follow the same naming structure but add “supplement”:

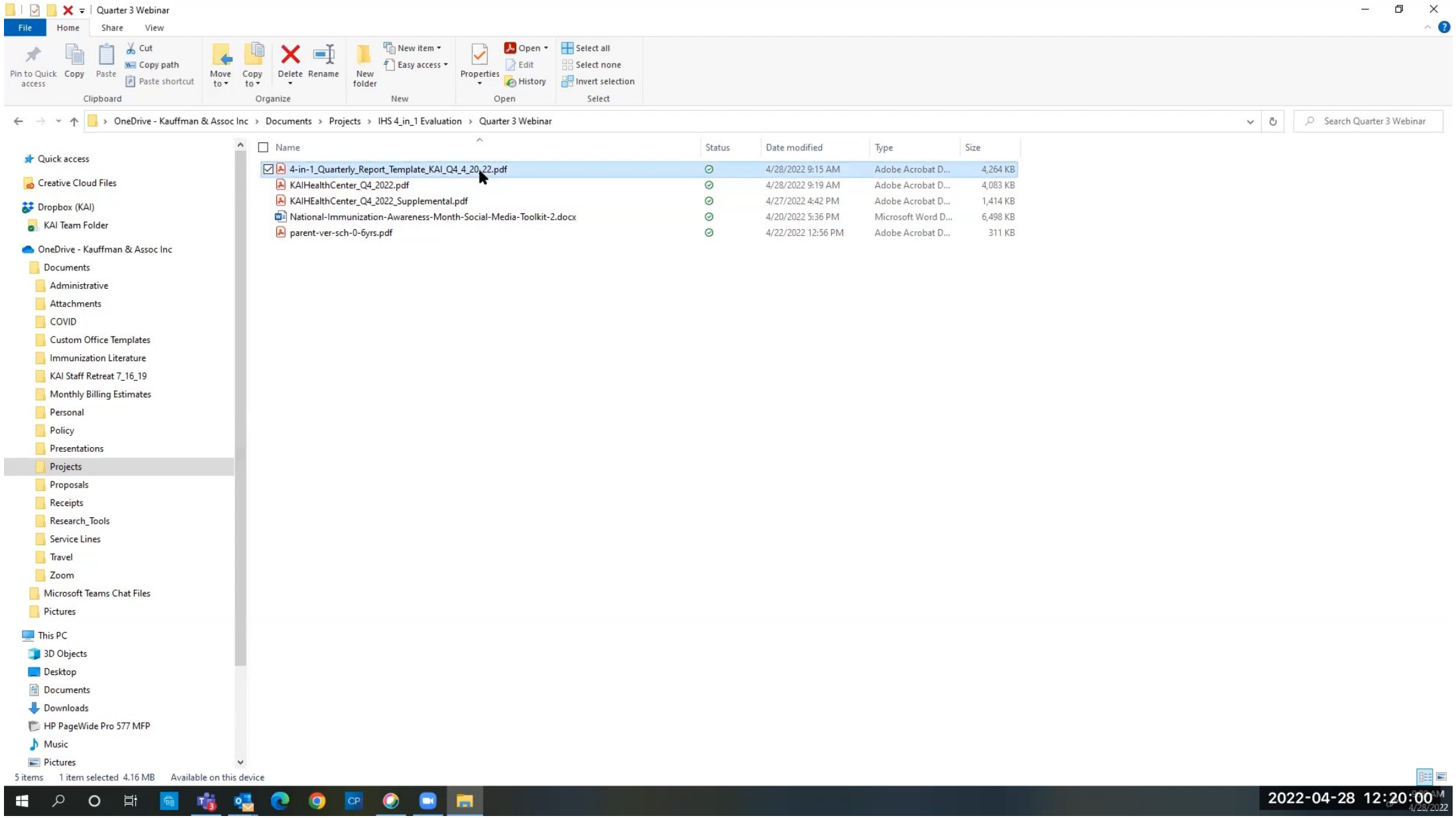
ABCHealthCenter_Q4_2022_Supplement

Upload

Upload the reporting form as two separate documents to GrantSolutions.

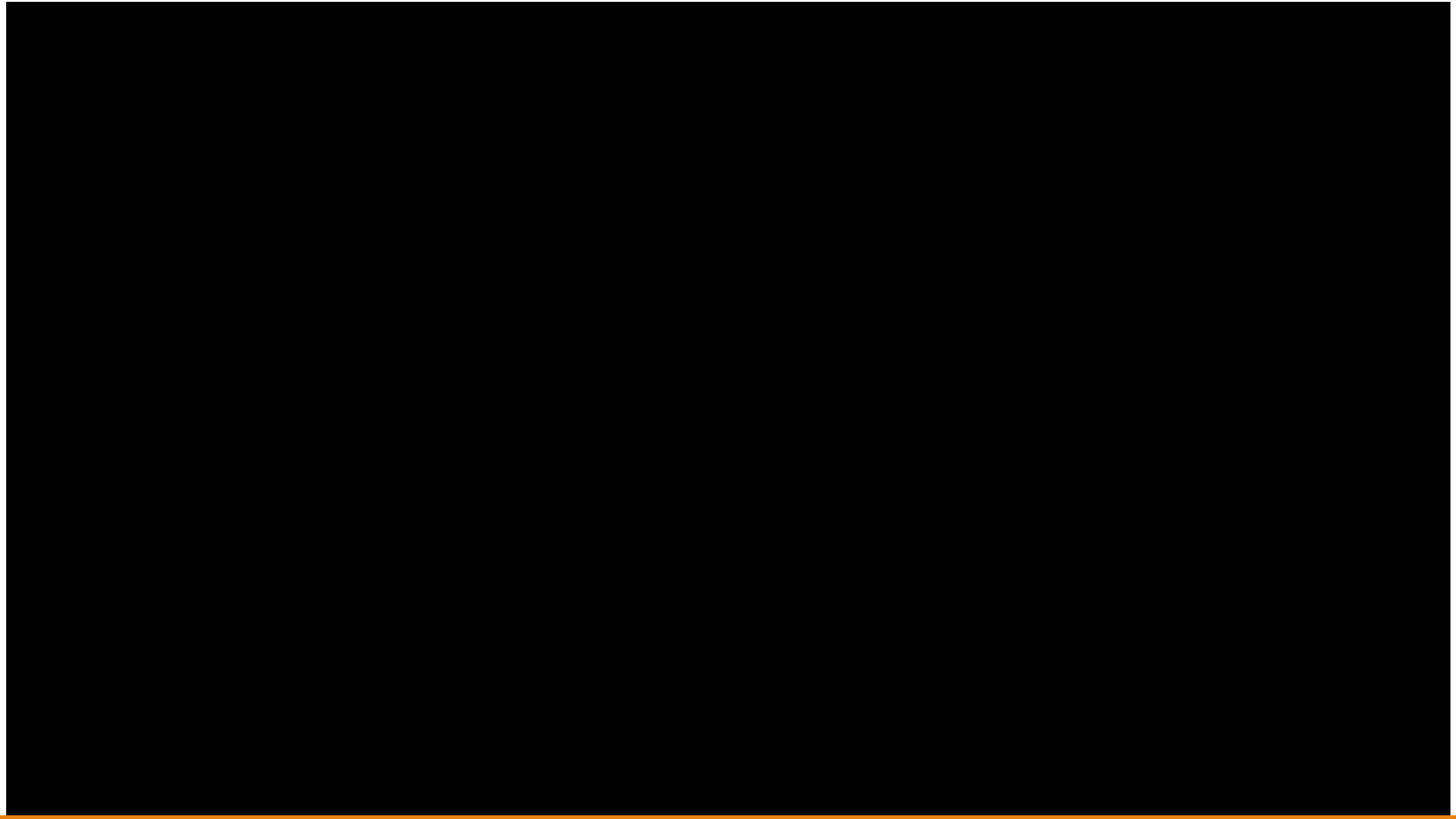
Video Demonstration

Adding Supplemental Files Using Adobe Acrobat Pro


Quarter 3 Webinar
File
Home
Share
View
Cut
Copy path
Paste shortcut
Pin to Quick access
Copy
Paste
Clipboard
Move to
Copy to
Delete
Rename
Organize
New item
Easy access
New folder
New
Properties
Open
Edit
History
Open
Select all
Select none
Invert selection
Select
OneDrive - Kauffman & Assoc Inc › Documents › Projects › IHS 4_in_1 Evaluation › Quarter 3 Webinar
Search Quarter 3 Webinar
Quick access
Creative Cloud Files
Dropbox (KAI)
KAI Team Folder
OneDrive - Kauffman & Assoc Inc
Documents
Administrative
Attachments
COVID
Custom Office Templates
Immunization Literature
KAI Staff Retreat 7_16_19
Monthly Billing Estimates
Personal
Policy
Presentations
Projects
Proposals
Receipts
Research_Tools
Service Lines
Travel
Zoom
Microsoft Teams Chat Files
Pictures
This PC
3D Objects
Desktop
Documents
Downloads
HP PageWide Pro 577 MFP
Music
Pictures
Name
Status
Date modified
Type
Size
4-in-1_Quarterly_Report_Template_KAI_Q4_4_20_22.pdf 4/28/2022 9:15 AM Adobe Acrobat D... 4,264 KB
KAIHealthCenter_Q4_2022.pdf 4/28/2022 9:19 AM Adobe Acrobat D... 4,083 KB
KAIHEalthCenter_Q4_2022_Supplemental.pdf 4/27/2022 4:42 PM Adobe Acrobat D... 1,414 KB
National-Immunization-Awareness-Month-Social-Media-Toolkit-2.docx 4/20/2022 5:36 PM Microsoft Word D... 6,498 KB
parent-ver-sch-0-6yrs.pdf 4/22/2022 12:56 PM Adobe Acrobat D... 311 KB
5 items
1 item selected 4.16 MB
Available on this device
2022-04-28 12:20:00

Video Demonstration

Adding Supplemental Files if You Do Not Have Adobe Acrobat Pro



Progress Report Due Dates

Quarterly Report	Due Date
Final Entire Year includes Quarter 4 Report • Entire year: 4/1/2021 – 3/31/2022 • Quarter 4: 1/01/2022 – 3/31/2022	June 30, 2022

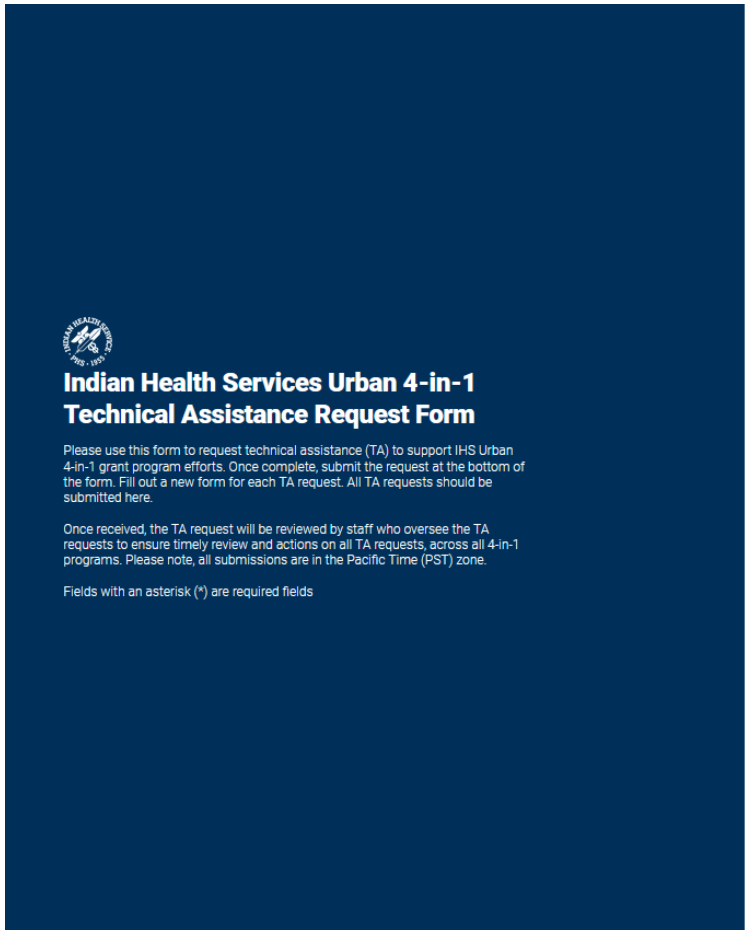
TA Request Form

Grantee TA Requests

Requests for TA:

- Were previously submitted to KAI via email by way of 4-in-1 program team and contracting officer representative
- Can now be submitted directly to KAI via a web-based form
- Can be submitted by grantees *and* by 4-in-1 program team on a grantee's behalf
- Should be used by grantees if there are any questions or concerns

Demonstration: Grantee TA Requests



Indian Health Services Urban 4-in-1 Technical Assistance Request Form

Please use this form to request technical assistance (TA) to support IHS Urban 4-in-1 grant program efforts. Once complete, submit the request at the bottom of the form. Fill out a new form for each TA request. All TA requests should be submitted here.

Once received, the TA request will be reviewed by staff who oversee the TA requests to ensure timely review and actions on all TA requests, across all 4-in-1 programs. Please note, all submissions are in the Pacific Time (PST) zone.

Fields with an asterisk (*) are required fields

Date Submitted

Grantee Name *

Identify which IHS Urban 4-in-1 grant program will directly receive TA as a result of this request.

Select or enter value

Name *

Enter your name, first and last. The name entered should be the person completing and submitting the TA request form.

Role *

Indicate your role in the submission of this TA request.

Select or enter value

Email Address *

Enter your email address. The address entered should be for the individual completing and submitting the TA request form.

Urgency Level: *

Indicate the level of urgency for the TA request.

Select or enter value

TA Type *

Select which of the following 4-in-1 grant program focus areas you need assistance with.

Select or enter value

TA Topic *

Select which of the following 4-in-1 grant program reporting areas you need assistance with. Select all that apply.

Select or enter value

TA Request Description and Details *

Enter a brief description about the TA request below and additional details important to responding to this request.

Preferred TA Method

Select the preferred method of TA for the request.

Next steps

Post	Enter	Request	Submit
IHS has posted the REVISED quarterly report form on the OUIHP 4-in-1 webpage	4-in-1 grantees will enter data into the REVISED report form for the most recent quarter	4-in-1 grantees may request technical assistance from KAI via TTA request form	4-in-1 grantees will submit the completed quarterly report form to IHS through GrantSolutions

INDIAN HEALTH SERVICE
PHS · 1955 ·