



Setting SMART goals

Data Capacity and CQI TTA Team

September 22, 2026





Presenters



Scott Baumgartner

Data Capacity and CQI
TTA Team Member



Scott Richman

Data Capacity and CQI
TTA Team Member



Join us for future nFORM/CQI office hours!

Check out the HMRF weekly grantee digest every Wednesday

- Scroll down to “nFORM and CQI Announcements” to register for office hours and find links to the latest resources
- Click on the office hours registration link; follow the registration instructions and click the “Add to calendar” button on the upper right of the Teams registration page
- Make sure everyone on your team signs up to receive the weekly digest using the “Weekly Digest Signup” link under Quick Links at the bottom of the email
- Contact us at nFORMCQITA@mathematica-mpr.com with any questions

Learn about the nFORM data export during office hours on Tuesday, October 13, 2026 – 2-3pm eastern time

During this session, the Data Capacity and CQI TTA team will review the data export, including how grants request a custom data export in nFORM. We will review the layout and information in the data export and discuss how grants can use the data export for CQI. **Scan the QR code** to register for the office hours.

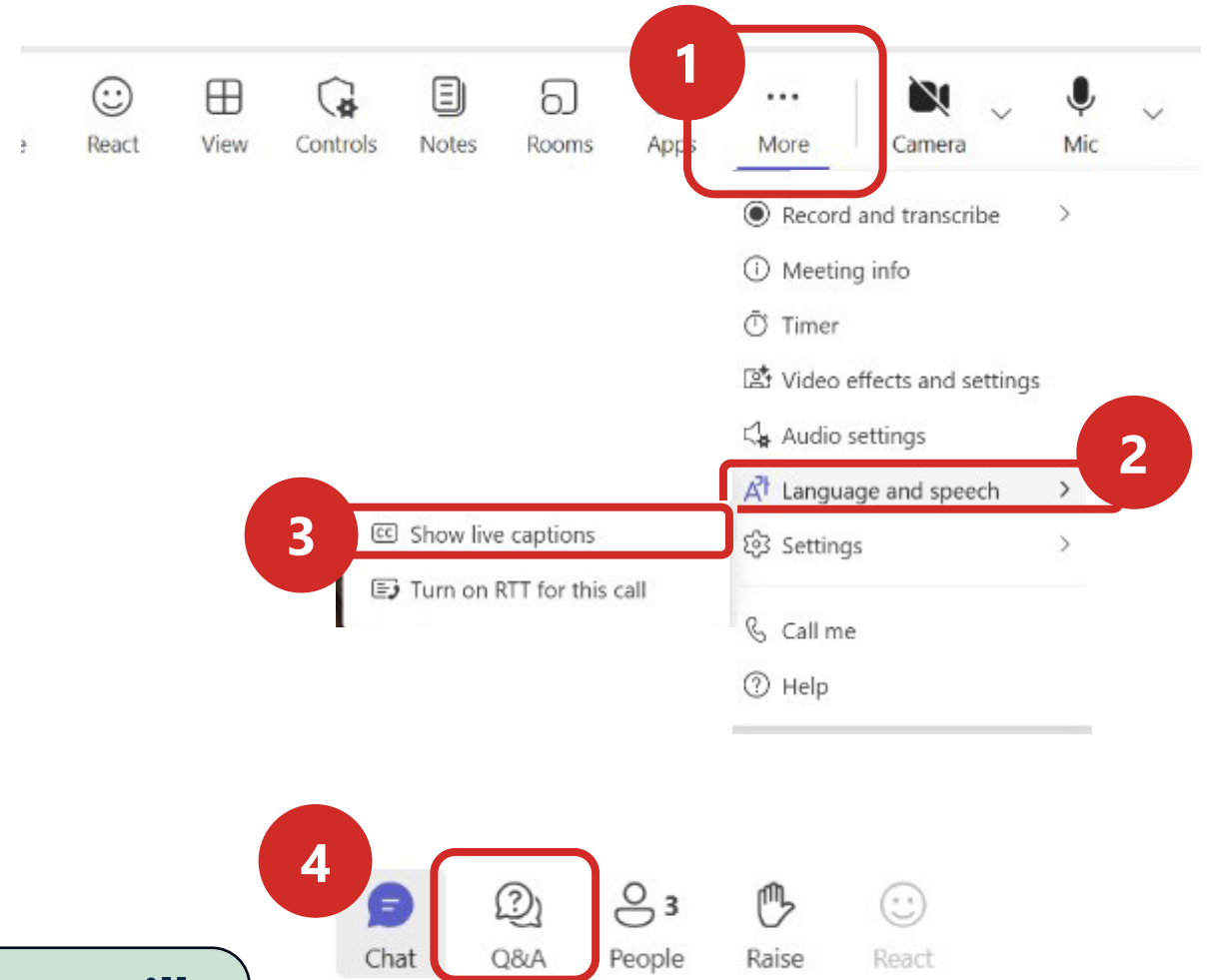




Housekeeping

- Please mute your line
- Access closed-captioning by clicking the “More...” icon in top right corner, select language and speech, and click “show live captions” (Steps 1, 2, 3)
- Use the Q&A to ask questions (Step 4)

Recording and slides from today’s office hours will be made available on the HMRF Grant Resource site at <https://hmrfgantresources.info/>





Reminder to submit data capacity and CQI plans to nFORMCQITA@mathematica-mpr.com

Copy your FPS when you submit

Plans due already for large and small grants and by September 30 for emerging grants

After initial submission, grant recipients should regularly update plans to reflect changes in program operations and service delivery

<https://www.hmrfgrantresources.info/resource/data-capacity-and-cqi-plan-template>

**Healthy Marriage and Responsible Fatherhood
Data Capacity and Continuous Quality Improvement (CQI)
Plan Template**

HMRF
HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

Plan/update date: Click or tap here to enter text

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to help grant recipients plan for and implement continuous quality improvement and data collection processes. Public reporting burden for this collection of information is estimated to average 6 hours per response, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This is a voluntary collection of information. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0531 and the expiration date is 9/30/2028. If you have any comments on this collection of information, please contact Hannah McInerney at nFORMCQITA@mathematica-mpr.com.

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Today's objective

- Be able to set a motivating SMART goal to drive program improvement

Today's agenda

- Recap: Using CQI in your HMRF program
- How to set SMART goals
- Setting a SMART goal: Application



| Recap: Using CQI in your HMRF program



From a data signal to a defined challenge: Identifying areas for improvement

1

Identified challenge



What is happening?

Use nFORM data tools to compare performance to targets and **look** for patterns.

Workshop participation drops after Session 2

2

Got specific



*Who? When? Where?
How much?*

Use nFORM data tools to **dig deeper** and break the data down by relevant characteristics.

Drop-off is greatest among participants in evening workshops

3

Investigated root causes



Why is it happening?

Use targeted conversations, interviews, and other feedback to gather participant and staff perspectives and **explore possible root causes**.

Clients in evening workshops can't find consistent childcare



From a defined challenge to a well-crafted improvement goal



**Setting improvement goals goes beyond just saying “We need to do better.”
Well-crafted goals need to be clear and have actionable objectives.**

What is the challenge? What are its root causes and potential drivers?

Be specific about the challenge to ensure your improvement goal addresses causes rather than symptoms

- What is the extent of the problem?
- Who is experiencing the problem?
- When and where does the problem present itself?



Where do we want to be? What does success look like?

Be specific about your improvement goals so you can track progress, celebrate success, and adjust if needed

- What are we trying to accomplish and by when?
- How will we know if we are successful?



Reflections in the Q&A

If your CQI team has identified early challenges, what improvement goals have you set?

What improvement goals might you set for the coming year?



| How to set SMART goals

What makes a goal SMART?

S	Specific
M	Measurable
A	Achievable
R	Relevant
T	Timebound

SMART goals support CQI

- ✓ Provide a gauge to track progress over time
- ✓ Are explicit about what you need to accomplish
- ✓ Keep the team focused on what matters
- ✓ Inspire action toward improvement



SMART provides the ingredients, but not the recipe

S

Specific

M

Measurable

A

Achievable

R

Relevant

T

Timebound





Specific



Document what we know



Who is affected by a challenge



When and where the challenge occurred



Tip: Use your data to pinpoint the who, when, and where

Ok: Improve initial session attendance



Better: Improve initial session attendance for participants enrolled at the Westside Service Center



Measurable



How much?



Tied to the specific challenge



Something you can observe and monitor over time



Tip: Make your measure simple and accessible so that teams can see progress and stay motivated

Ok: Increase initial session attendance at Westside Service Center



Better: Increase initial session attendance at Westside Service Center to 12 clients.



Achievable



What's realistic?



Grounded in reality, context, what you have power to change, and your timeframe



Tip: Review trends in data and talk to staff about whether a goal is attainable. Consider opportunities to make *incremental* progress.



Increasing initial session attendance at Westside Service Center to 12 clients equates to getting 4 more participants to attend their first session.



Staff agree this is doable.



Relevant



Does it matter?



Meaningful to the CQI team, leaders, and staff



Focused on a result, not a process



Tip: The relevance of a goal related to a challenge might seem obvious, but it's still important to check, especially when you have competing priorities.



Increasing initial session attendance at Westside Service Center to 12 clients will help us reach our annual target for initial attendance.



Staff agree this is a relevant goal to focus on.



Time-bound



When will we see improvement?



Gives enough time to see results



Isn't so far in the future that staff lose motivation or you can't course correct



Tip: Consider your program structure and key milestones to set timelines that make sense

Ok: Have a total of 12 clients attend an initial session at Westside Service Center



Better: Increase initial attendance to 12 clients at the Westside Service Center workshop series that starts on October 1st



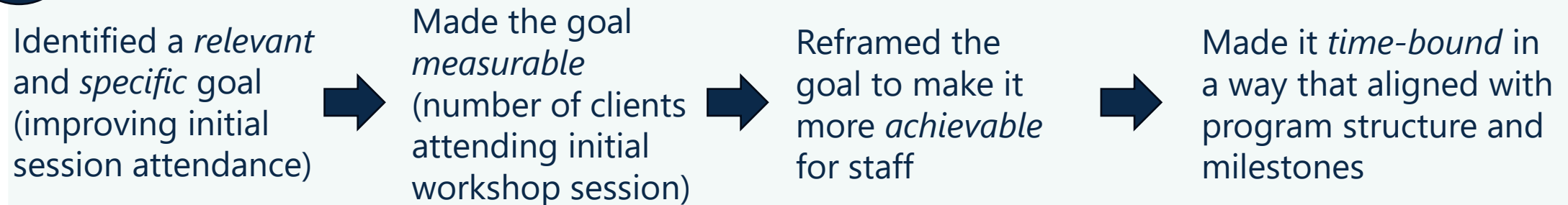
Putting it all together: Did you use all your ingredients?

Use SMART like an ingredient list and consider whether the goal makes sense overall.

- Is your goal relevant and specific for your team?
- How will you measure change?
- Is your goal achievable in the time you've identified?



The evolution of our example SMART goal





nFORM data sources to help monitor progress toward your SMART goal



Performance Progress Report

Review and describe grant-year progress on key client enrollment, participation, and outcome measures, and program operations and challenges.



Query Tool

Use filters to tailor visualizations of client progress on key measures and compare populations, time periods, client groups, services, and outcomes.



Operational Reports

Run focused reports to manage day-to-day programming and monitor data quality for survey completion, workshop attendance, individual services, caseloads, and other activities.



Data Exports

Download all nFORM data except for PII to conduct deeper analysis, check data quality, identify patterns, and explore trends across program activities.



Pair nFORM data with feedback from participants, staff, partners, and others to understand what may be behind the numbers.



Reflections in the Q&A

If you already have or plan to set improvement goals for the coming year, how can you make them SMART goals?

How do you set goals that are achievable in the timeframe you've identified?



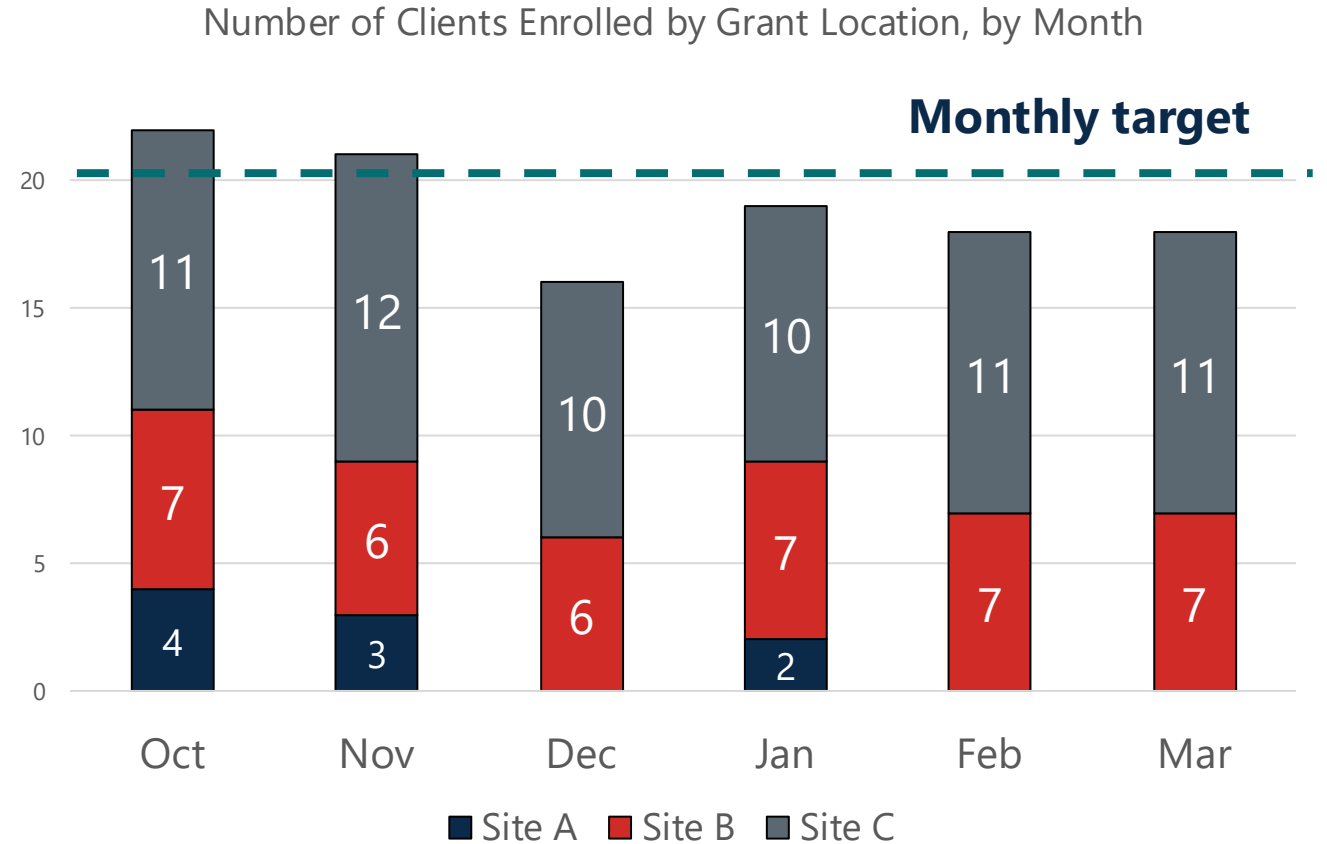
| Setting a SMART goal: Application



Use data to develop a specific and relevant goal

On the Enrollment tab of the query tool, you see this chart:

Improve enrollment at Site A.

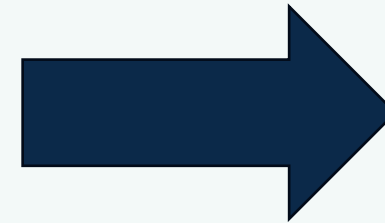




Let's make it measurable.

Recap what you know

Your annual enrollment target is **252 moms** (**21 moms per month**, or **7 moms per month at each site**).



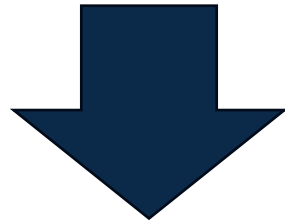
Enroll 7 moms
per month at
Site A



Is the goal achievable and timebound?

Talk to staff at Site A about the challenge...

- Site A has been enrolling very few moms.
- Case managers tell you that there has been a lot of turnover in referral partners, and it will take time to re-establish the partnerships.



Revise to a more achievable goal and make it time-bound so you know when to check and see whether you were successful.

Enroll two moms at Site A next month



Next steps

Plan to revisit the goal in April, which is the one-month timeframe you set in your SMART goal.

- **Did you meet the goal?** If yes, what helped you meet the goal? If not, why not?
- **Revise the goal, if needed.** Is the goal still relevant? Can you increase the target?
- **Set additional goals, if needed.** You might need to set additional SMART goals with different time frames to meet your annual enrollment target.



Reminder: Use nFORM data tools to monitor progress towards your SMART goals.



| Questions?





Wrap up

All nFORM and CQI resources on HMRF Grant Resource site at <https://hmrfgrantresources.info/>

Submit your Data Capacity and CQI plan to the help desk by September 30, if you haven't already

After reviewing resources, contact the data capacity and CQI TTA help desk with any questions at nFORMCQITA@mathematica-mpr.com

Data security reminders

- Never text or email personally identifiable information (PII) like client names – including to the help desk
- Never take screenshots of client PII from nFORM
- Everyone who interacts with client data should watch the [Keeping Data Secure training video](#) and review **Module I of the nFORM user manual**

Don't forget to register for the next office hours on **October 13!**

