



Fostering a Culture of Learning and Improvement

Well nFORMed: nFORM and CQI Training Series, Day 4 – June 9, 2026

Data capacity and CQI TTA team, Mathematica

Welcome! In the chat, please share one area of your program you want to better understand or improve this year.





Today's presenters



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Housekeeping

Please mute your line.

Access closed-captioning by clicking the "CC" icon in the lower left corner, or by pressing CTRL+SHIFT+A.

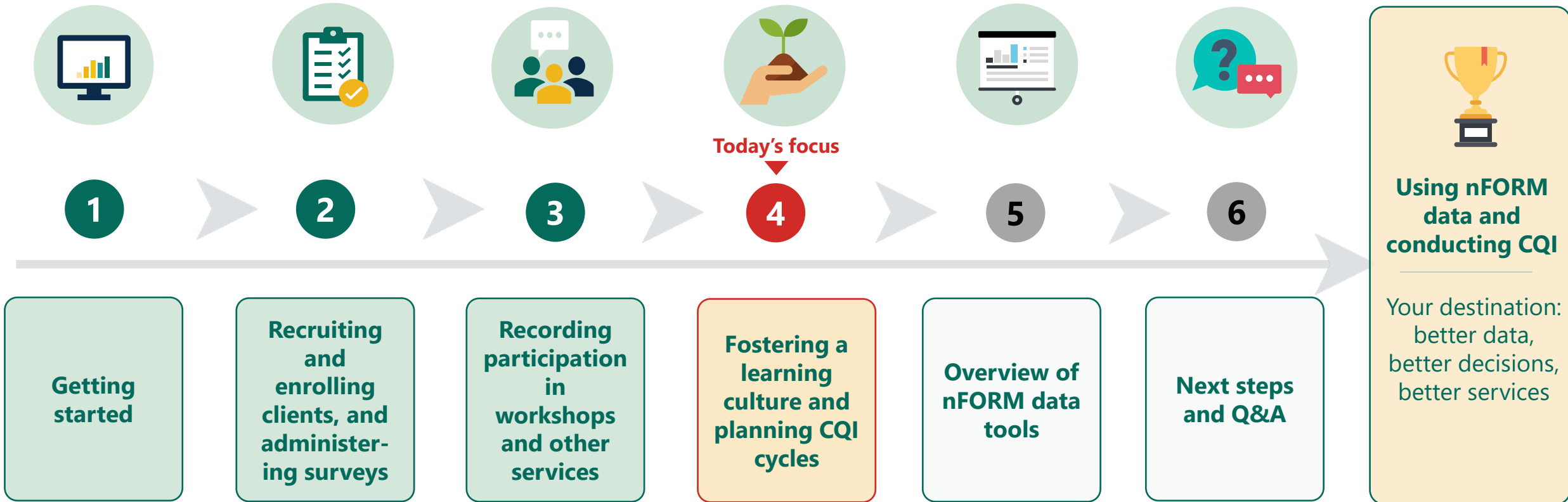
Use the chat to ask questions.

Recording and slides from today's training will be made available on the HMRF Grant Resource site at <https://hmrfggrantresources.info/>





Well nFORMed Training Series Roadmap





Agenda

- » **What is continuous quality improvement (CQI)?**
- » **How the CQI cycle works**
- » **Using CQI tools:**
 - Data Capacity and CQI Plan Template
 - CQI Cycle Worksheet
- » **Building a learning culture**
- » **Questions and answers**



| What is CQI?



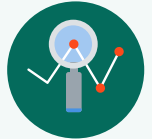
What Is Continuous Quality Improvement (CQI)?



**CQI IS A STRUCTURED,
ONGOING PROCESS TO:**



Identify and understand
challenges



Test solutions



Learn what works



Improve programs over time

VS.



CQI IS NOT:



One-time activity



Reviewing staff performance



One fixed solution



Formal evaluation of
effectiveness

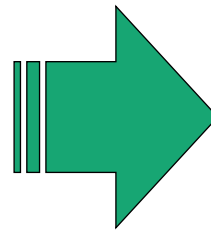


How CQI builds on project monitoring

Program monitoring

Tracks what is happening

Flags areas for improvement



CQI

Explores why the challenge is happening

Develops strategies

Tests solutions using **data**

Improves over time



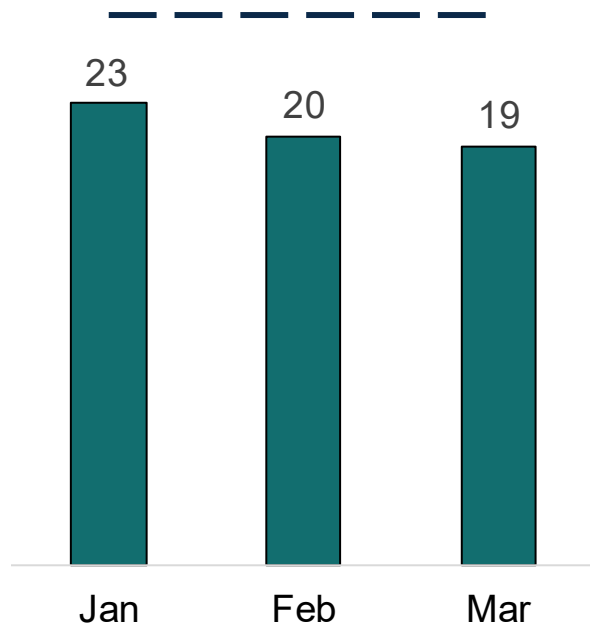
A systematic process to address challenges

Program monitoring

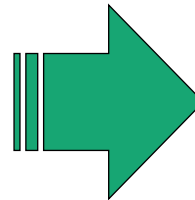
Identify the challenge



Target:
25 clients/
month



Number of new clients each month

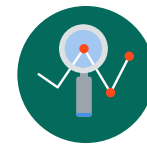


CQI

Develop and test the strategy



Identified challenge:
Low program enrollment



Test a strategy:
How can we increase enrollment?



Use data:
How do we know it's working?



Learn + decide:
What worked? What's next?



CQI uses data to drive improvement



Use **nFORM and other data** to monitor program operations and inform program improvement efforts

Consider what data will answer your questions



Identify

where challenges exist



Understand

what's driving the challenge



Track

whether strategies are working



Monitor

progress over time



| How the CQI cycle works



This cycle is continuous, each step builds on the last as your team works toward better results





Step 1: Identify a challenge and set a goal

Before we decide what to improve, we need to understand what's actually going on and why



Focus on ONE challenge at a time

Start small to improve learning and keep the work manageable



Be specific

What exactly needs to improve? Include staff and partners who see the challenge firsthand



Set a clear goal

Define what will improve, by how much, and by when



Don't jump into "fix it mode"— dig into what is happening and why



Tap into data and perspectives

- Look at nForm and other program data to identify patterns and trends
- Talk to staff, participants, and partners to understand what is happening



Get specific about the challenge

- Identify where this problem is happening and who it affects
- Explore why it is happening (root causes)



Write a clear problem statement

- Describe the challenge
- Where and why is it happening



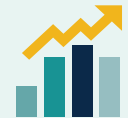
Develop a SMART goal to guide CQI efforts



Specific: Be clear about what will improve and for whom



Measurable: Define how you will measure progress using quantifiable data (e.g., number or percentage).



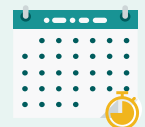
Attainable: Set a goal that is realistic and achievable with the time, resources and support available.



Relevant: Choose a goal that aligns with your program's priorities and will make a meaningful difference.



Time-bound: Specify by when the team expects to see improvement.





What does a SMART goal look like?

Example: A program noticed that they are below their monthly enrollment target. After reviewing nFORM data, they see that the number of referrals from partner organizations is lower than expected.

S

Specific: Increase enrollment of community fathers from partner referrals

M

Measurable: Increase from 30 to 45 enrollments per month; track using nFORM data

A

Achievable: Based on current program capacity and the number of eligible participants served by partners, this increase is realistic and won't overburden staff

R

Relevant: Enrollment is below target and referral volume from partners is lower than expected

T

Time-bound: We will test an improvement strategy over three months



Step 2: Identify an improvement strategy

Now that you have a root cause of the challenge and a SMART goal, identify and describe the improvement strategy you want to test to resolve that challenge



Generate ideas

What could you try?
Gather ideas from staff most directly involved in the challenge



Choose ONE strategy

Start small and choose a strategy that aligns with the root cause of the challenge and is realistic to implement



Describe your strategy

Clearly describe how the strategy will work in practice, including roles, responsibilities, timing, and key activities

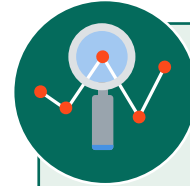


Turn your challenge into a testable strategy



Make it focused

- Ensure the strategy addresses the root cause of the challenge
- Can be tested on small scale (e.g., one group)
- Define one clear action (what will you do?)



Design it to learn

- Helps you understand what works
- Is measurable with the data you will track
- Can be adjusted based on results



Here is what step 2 could look like in your program:



This helps your team take action, test ideas, and learn what works



Step 3: Test your strategy (road-test)

Try the strategy on a small scale and learn what happens before committing to it



Start small

Test with one group or site, keep it small and manageable



Be intentional

What are you actually trying to learn?



Plan the test

Plan the who, what, when, and how so it can be done consistently. Be clear on who will implement it and what support they need

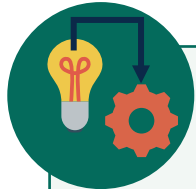


A strong road test is designed for learning



Planning and learning focus

- Define learning questions tied to the strategy and challenge
- Keep the test small and manageable
- Set a timeline that allows the team to learn about feasibility and expected outcomes



Implementation

- Clearly describe how the strategy will be implemented
- Define roles, responsibilities, and key tasks
- Identify the tools, supports, and data needed during the road test

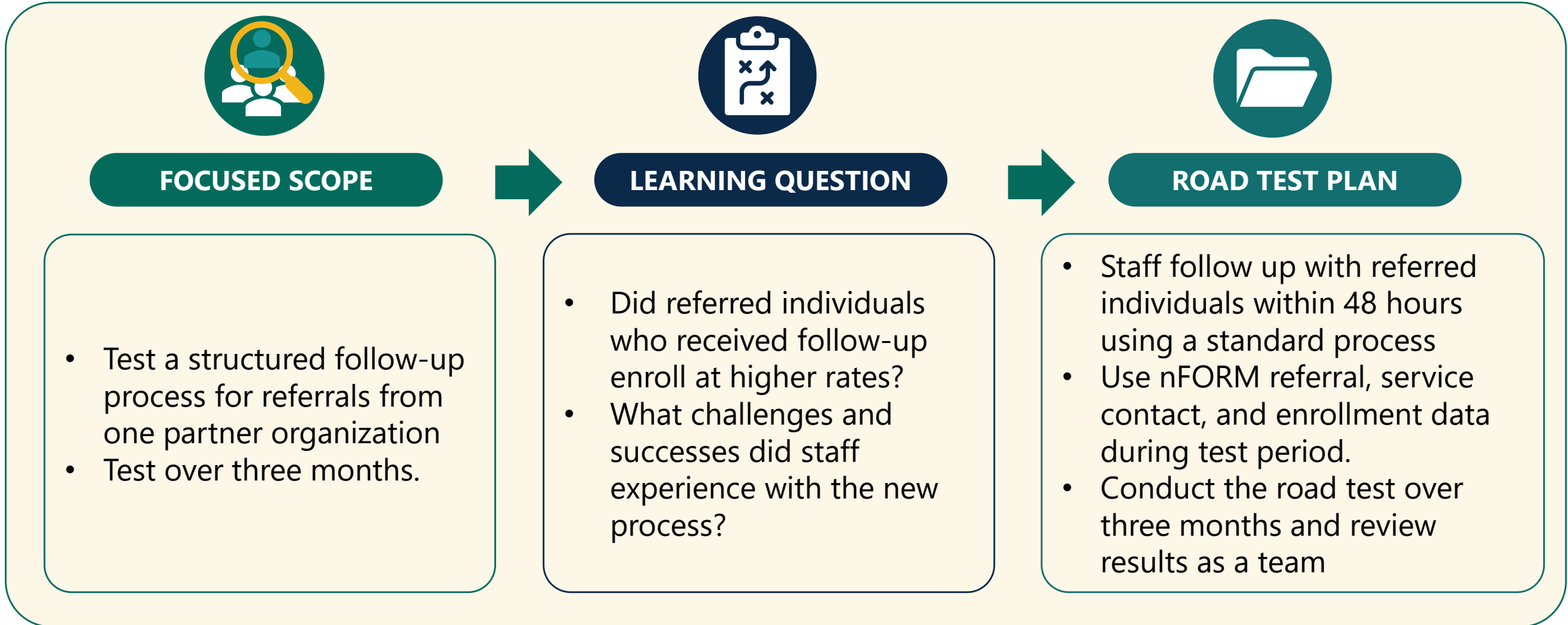


Tracking and documentation

- Track data that helps answer your learning questions
- Document road test experiences and challenges
- Capture staff feedback throughout the road test



Here is what step 3 could look like in your program:





Step 4: Monitor

Use data to understand what happened during your road test



Gather the right data

Only track what you need to answer your learning questions. What actually happened?



Compare to your SMART goal

Compare results to your SMART goal and look for change over time. Did things improve?

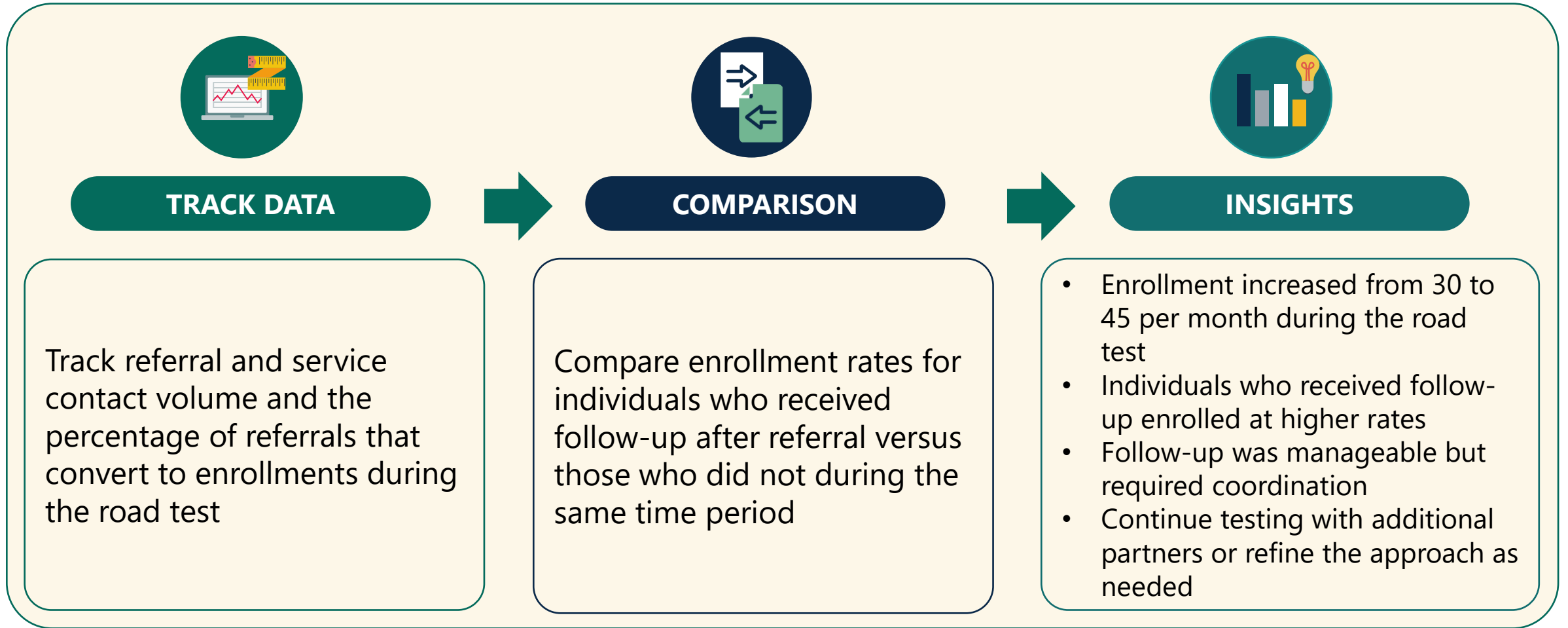


Identify insights

What worked?
What didn't?
What should you do next?



Here is what step 4 could look like in your program:



Clear measures and comparisons help your team understand what worked and decide what to do next



Step 5: Communicate and act on results

Share what you learned and decide what to do next



Share clearly

- Summarize what you tested and what changed
- Highlight key results (e.g., referrals and enrollment)
- Be specific about results:
By how much and for who



Engage the right people

- Include staff who implemented the strategy
- Discuss what worked, what didn't, and what it took to implement
- Consider effort, feasibility, and sustainability

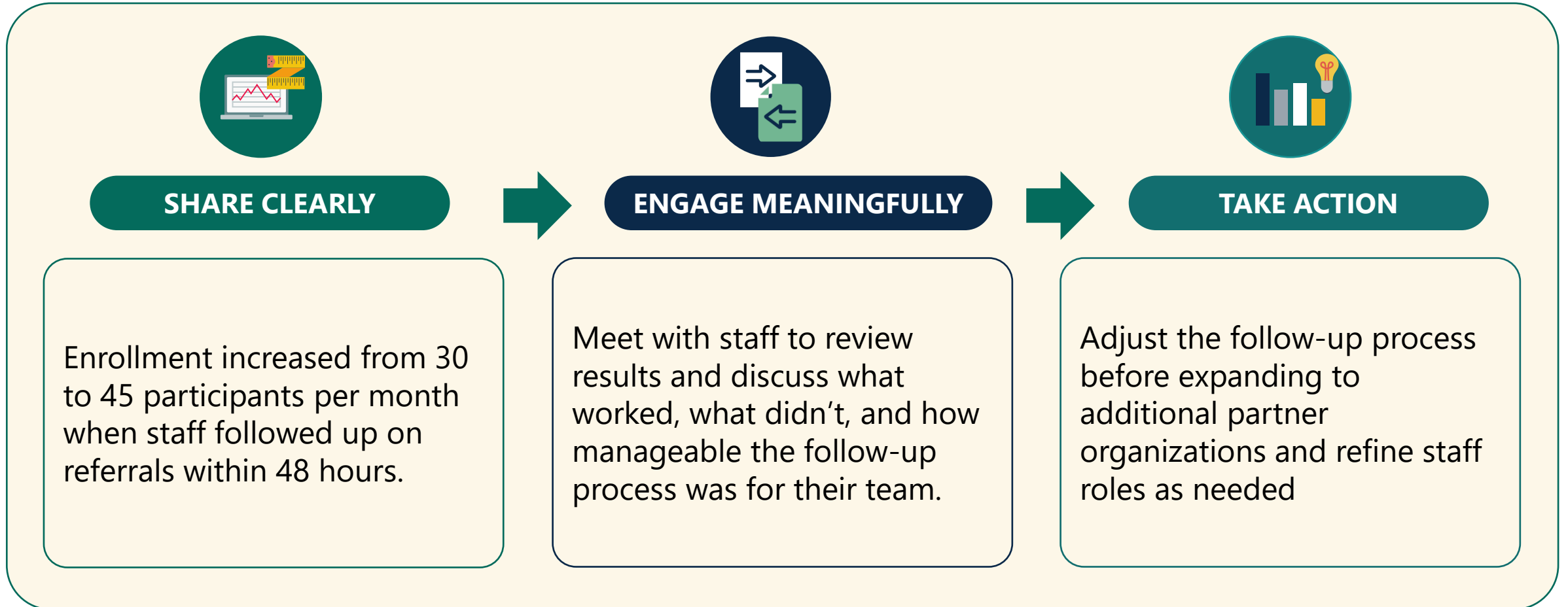


Take action based on data and staff input

- Scale, adjust, abandon
- Scale what works when it supports program improvement and is feasible at scale
- Adjust or test again before expanding



Here is what step 5 could look like in your program:





Let's pause for questions



Using CQI tools:

- **Data Capacity and CQI Plan Template**
- **CQI Cycle Worksheet**



Purpose of the Data Capacity and CQI Plan Template



What the plan does

- Clarifies who is involved in CQI
- Describes how your team will move through the CQI cycle
- Organizes how CQI activities will be carried out and supported over time



Why this plan matters

- Helps teams use data to improve services and participant outcomes
- Creates shared expectations with your team and your FPS
- Supports consistent implementation and long-term program improvement






Your plan documents how your team will carry out each step of the CQI process



What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?
<p>Step 1. Identify an area to improve and set a goal. Identify challenges to address with CQI. Describe data sources you will monitor to identify challenges, including nFORM, staff and participant feedback, and other data sources.</p>			
<p>Step 2. Identify a strategy. Develop new strategies to address identified challenges. Describe how you will identify strategy ideas to try.</p>			
<p>Step 3. Conduct a road test to refine implementation. Test out new ideas. Indicate whether you will use HMRF CQI road testing or PDSA cycles to test improvement strategies.</p>			
<p>Step 4. Monitor outcomes. Determine whether CQI improvement strategies support the improvement your team was expecting by monitoring progress toward your SMART goal.</p>			
<p>Step 5. Communicate and act on results. Communicate the results of the CQI road test with key groups external to the CQI team, such as your organization's leadership, other staff, partners, and the community. Prepare to implement a successful strategy at scale.</p>			



This template helps you:

-  Clarify roles and timeline
-  Plan how work will happen
-  Track and document your improvement process



The CQI Cycle Worksheet is a practical tool for planning, tracking, and learning from CQI cycles

What the tool helps you do

Plan and document one CQI cycle at a time

- Plan one CQI cycle at a time from challenge (step 1) to action (step 5)
- Designed to align directly with the HMRF CQI cycle
- Clearly document what you are testing and why
- Keep your team aligned throughout the process

How it supports your team

Track learning and guide decisions

- Organize key decisions, data, and next steps
- Reflect on what worked, what didn't, and why
- Support communication with staff, leadership, and partners
- Focused on real-world use, not just documentation



Step 1. Identify an area to improve and set a goal

What is the specific problem or issue you are trying to solve? Drill down on nFORM and other program data and talk to relevant collaborators, like staff and participants, to learn more about the problem. Then, write a comprehensive problem statement to be clear about what challenge the team is aiming to resolve, where the challenge is occurring in your program, and the root cause(s) of the challenge.

EXAMPLE: The *New Families* program has fallen below internal enrollment targets for the past three months. Wanting to better understand the issue, the program examines the average time between the first recruitment touchpoint and enrollment for new clients. The team learns that if two or more weeks pass between recruitment and enrollment, people are less likely to enroll. They now have a more refined understanding of the problem. They are ready to draft their comprehensive problem statement describing the high-level challenge (low enrollment) and the underlying root cause of the challenge (clients are disengaging between recruitment and enrollment).

Write your problem statement: [Click or tap here to enter text.](#)

Set a goal. Having clear goals gives the team a way to assess progress and success. Make the goal specific, measurable, attainable, relevant, and timebound (**SMART**). Below is a template you can use to write the goal:

Our goal is to:

Increase/decrease: [Click or tap here to enter text.](#) (outcome)

From: [Click or tap here to enter text.](#) (baseline; the current percentage or amount associated with the outcome)

To: [Click or tap here to enter text.](#) (goal; the target outcome percentage or amount you want to achieve)

By: [Click or tap here to enter text.](#) (date/timeframe)

For/In: [Click or tap here to enter text.](#) (population/program component)



Sections reflect each step in the CQI cycle



Examples provide guidance and inspiration



Resource links connect you to related tools and tip sheet



Fillable fields prompt your team to add information and plans



| Building a learning culture



What is a learning culture?

The foundation that makes CQI work in practice

1

Learning is shared across staff, not limited to leadership

2

Data is used to answer questions, not just report outcomes

3

Staff feel safe to test ideas and learn from results




A learning culture creates the conditions for continuous improvement.



Everyone plays a role in a learning culture

When everyone participates, we ask better questions, learn more, and make better decisions



CQI team

- Leads planning, testing, and monitoring
- Brings data and insights to guide decisions
- Documents and shares learning



Staff

- Contribute ideas, feedback, and perspectives
- Ask questions and explore new ideas
- Test strategies and share what they learn



Leadership

- Supports and champions a culture of learning
- Provides resources and removes barriers
- Models curiosity and data-informed decisions



Partners

- Offer input and lived experiences
- Provide outside perspectives
- Help expand learning and solutions



In a learning culture...



Leadership sets the tone

- Leaders encourage staff at all levels to ask questions
- Leaders support testing new ideas and approaches
- Leaders model data-informed decision-making



Data drive learning

- Data is used to answer questions
- Both quantitative and qualitative data are used
- Staff see the value of data and use it for program improvement
- Data is used for improvement, not judgment



Building a learning culture takes time and practice



Assess where you are

- Identify strengths and areas for growth
- Use learning culture assessment tools
- Involve staff at all levels



Start with one focus

- Choose one area to improve
- Keep it specific and achievable
- Build confidence by starting small



Create simple routines

- Build regular check-ins and discussions
- Make time to reflect as a team
- Use simple agendas and consistent cadence



Use data to learn, not judge

- Use both qualitative and quantitative data
- Focus on learning and improvement, not outcomes
- Ask "what can we learn"?



Document and share learning

- Capture what you learn along the way
- Use what you learn to adjust and improve
- Share insights across the team



| Questions?





Wrap up



All CQI resources are posted on HMRF Grant Resource site at <https://hmrfggrantresources.info/>

Access key CQI resources on the HMRF Grant Resource site.

- [Data Capacity and CQI Plan Template](#)
- [CQI Cycle Worksheet](#)

The screenshot shows the HMRF Grant Resource website interface. At the top, there is a navigation bar with the HMRF logo and the tagline 'HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD'. Below the logo, there are several menu items: 'nFORM/CQI RESOURCES', 'nFORM (2020)', 'CQI (2020)', and 'INTERACTIVE SNAPSHOTS'. A red box labeled '1' points to the 'nFORM/CQI RESOURCES' menu item.

The main content area shows a search bar with the text 'Search for nFORM and CQI Resources'. Below the search bar, there are 'APPLY' and 'RESET' buttons. A red box labeled '2' points to the search bar containing the text 'CQI'. Below the search bar, there is a 'Refine results' section with a dropdown menu for 'Contains any of these words' and another 'APPLY' and 'RESET' button. A red box labeled '3' points to the search results area.

The search results are displayed as a list of items. The first item is 'Data Capacity and CQI Plan Template', which includes a description: 'This template guides HMRF grants through the key stages of data collection and CQI to help plan ahead and train staff. Grant teams should regularly review and update their plan as needed to reflect changes in program operations and service delivery.' and a date 'Mar 2026'. The second item is 'Continuous Quality Improvement Cycle Worksheet', which includes a description: 'This template helps CQI teams plan and track progress on CQI cycles.' and a date 'Mar 2026'. A red box labeled '3' points to the first search result.

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



Well nFORMed Training Series Roadmap

