



Tools for success: Enhancing CQI team collaboration

Data Capacity and CQI TTA Team

July 28, 2026





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

Answer polls through Slido

- Will automatically appear in your righthand panel when poll is launched
- If needed, click “apps” button at bottom of your screen and select Slido

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





Today's objectives

- Understand how CQI teams can organize themselves to successfully collaborate
- Learn strategies for facilitating CQI team meetings, check-ins, and decision-making
- Learn how to use CQI tools to strengthen communication, document decisions, and support follow-through



Agenda



- **Why a CQI team matters**
- **Establishing a shared purpose**



- **CQI team roles and responsibilities**



- **CQI team meetings**
- **CQI team communication**



- **Questions and answers**



| Why a CQI team matters



Why have a CQI team?



Shared responsibilities

Keeps improvement work from sitting with one person or getting lost among competing priorities



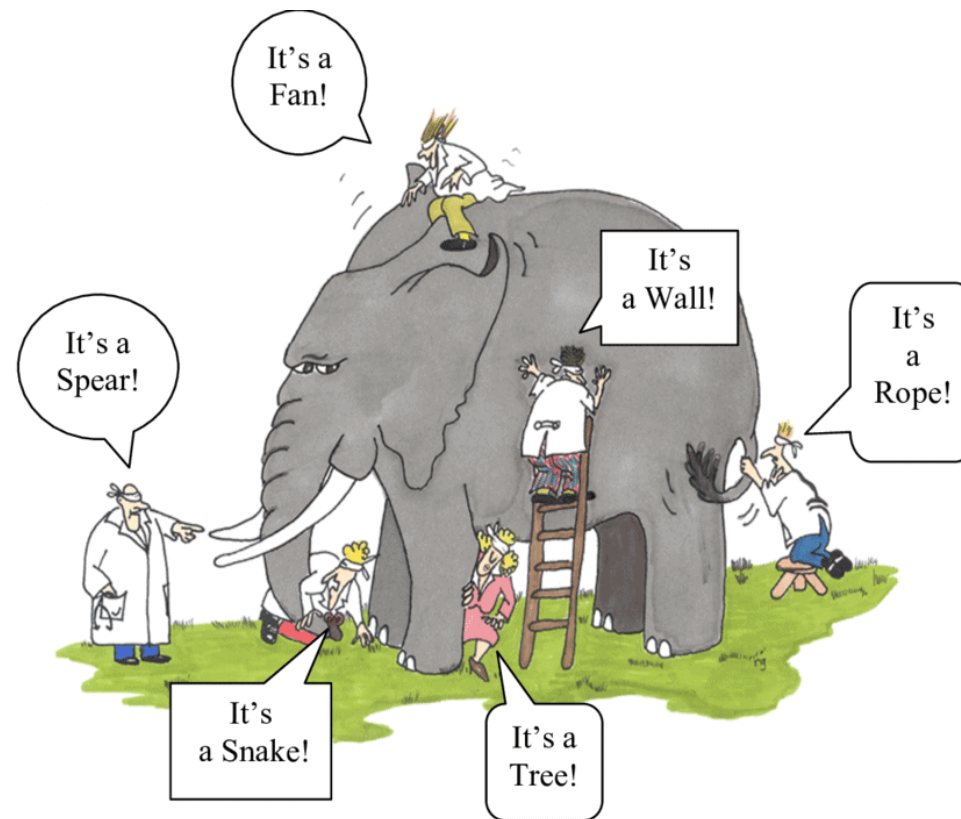
Broader perspectives

Brings together staff, leadership, partner, and participant perspectives to better understand challenges



Stronger decisions

Helps the team use data to identify realistic strategies, support follow-through, and improve services over time





CQI team collaboration supports every step of the CQI cycle



1 Bring the right perspectives together
Use data and input from interested groups to understand the challenge

2 Generate and prioritize ideas
Discuss possible strategies and select one realistic approach to test.

3 Clarify who will do what
Define roles, timing, supports, and learning questions for the road test.

4 Make sense of what happened
Review data and implementation feedback to understand progress, challenges, and lessons learned.

5 Share learning with others
Communicate updates, decisions, and lessons learned beyond the CQI team.

Characteristics of successful CQI teams:



Shared purpose

A clear understanding of the team's overall CQI vision, purpose, and goals for using data to support improvement.



What is the team here to accomplish?



Clear roles

Defined responsibilities for leading the process, bringing data, documenting decisions, and following up on next steps.



Who is responsible for what?



Meeting routines

A consistent cadence, agenda, and structure for reviewing progress, checking in, and identifying next steps.



How will we work together regularly?



Communication practices

A plan for sharing updates, decisions, and learning with staff, leadership, partners, participants, FPS, and others.



Who needs to know what, and when?



Review and update Section D in your [Data Capacity and CQI plan](#)



| Establishing a shared purpose



Shared purpose helps the team stay focused on learning, collaboration, and improvement

Be curious, not punitive



Recommended practice:

Use data and feedback to understand what is happening, not to assign blame.



Ask: What can we learn from this?

Use data and experience together



Recommended practice:

Combine nFORM and other data, staff experience, partner input, and client feedback to understand the full picture.



Ask: Whose perspectives do we need?

Focus on improvement



Recommended practice:

Treat road tests, feedback, and results as opportunities to learn what works and what needs to change.



Ask: What will we test, adjust, or learn next?



Agreement worksheet: Document shared purpose

Define the team's purpose

- Vision, goals, and objectives

Clarify how the team will operate

- Roles and responsibilities
- Scope
- Meeting structure

Document how decisions and follow-through will happen

- Communication processes
- Authority, influence, and decision-making process
- Deliverables



[HMRP resource site:](#)

Implementation team agreement

 CQI Best Practices



IMPLEMENTATION TEAM AGREEMENT WORKSHEET

This worksheet provides a template that implementation teams can use to define core team agreements. Questions are provided in each section to guide the development of a team agreement with a focus on CQI.

Implementation teams are responsible for actively supporting implementation of the program. Team members should have detailed knowledge of the program. An implementation team is not an advisory group, but rather a team that is actively and regularly involved in program implementation.

COMPONENT	GUIDING QUESTIONS	RESPONSES AND NOTES
Vision	• What is the overarching vision for the team? How does the vision emphasize CQI? • Does this align with the organization's vision?	
Goals and Objectives	• What are the main purposes of the team related to CQI? • What are the team's goals for using data to inform decision-making and improvement?	
Roles, Responsibilities and Scope	• Who participates and in what roles? • What are the team's responsibilities? • How do team members share accountability for CQI? (For example, who will be responsible for gathering data and information?)	
	• How does the IT communicate or work with other groups (like an evaluation team, or outside partner/group)?	
Communication Protocols	• How does this team communicate internally? • How do team members gather and share information outside the team and feedback related to CQI efforts? • When improvement decisions are made, how are they communicated? • Who communicates team activities and decisions and how often?	
Resources available to the group or project	• What resources are available to support the implementation team's work? Specifically, what resources are available to support CQI? • What resources are important to document in this agreement?	
Authority and Influence and Decision-Making Process	• What authority does the team have in making CQI improvement decisions? • How does the team make decisions? • What are the limits of the team's authority?	
Deliverables	• What are expected deliverables (and anticipated timing) of the team and its members?	

After answering the questions above, you can then make this into a standalone implementation team agreement document, or keep it in the table format above. Once completed, have each team member sign it and pick a date in the future to revisit this agreement and make any changes needed at that time. (Note: add signatures as needed.)



| CQI team roles and responsibilities



Roles and responsibilities

Role

Responsibilities

Team leader

- Oversees the CQI process

CQI plan lead

- Documents and updates the CQI plan

Data manager

- Oversees data collection, analyzes data to measure progress, presents findings

Improvement advisors

- Contribute insights about challenges and designing relevant strategies

Training/technical assistance (TA) supervisors

- Support implementation of new strategies



Building your CQI team

The CQI team should be small enough to work efficiently, but large enough to include the perspectives needed to understand the challenge and test realistic solutions.

CQI team roles and examples of positions that can fill each role

 Team leader	 CQI plan lead	 Data manager	 Improvement advisors	 Training/TA supervisors
• Program director • Program manager • Data manager or other data/evaluation staff	• Data manager or other data/evaluation staff	• Grant's designated data manager	• Frontline staff • Partners • Participants/families • Community partners	• Program leadership • Frontline staff

Typically remain consistent throughout the grant

May vary depending on the CQI cycle and challenge being addressed



Add your thoughts to the chat:

**If you have established your CQI team,
what types of staff will participate on a
regular basis?**



| CQI team meetings



Successful CQI team meetings...

Meet regularly



Recommended practice:

Meet on a consistent basis, at least **once a month**, to keep CQI work moving.



Tip: A regular cadence helps the team review progress, troubleshoot barriers, and identify next steps before work stalls.



Ask: How often will we meet, and who will keep meetings on track?

Have CQI-specific focus



Recommended practice:

Create a dedicated CQI meeting, not just a standing agenda item in another team meeting.



Tip: If CQI is only a quick agenda item, data review, sensemaking, decision-making, and follow-through can get crowded out.



Ask: What CQI question, challenge, or decision will guide this meeting?

Bring the right people



Recommended practice:

Establish a consistent core CQI team and invite additional perspectives based on the challenge being addressed.



Tip: Your core team may include the team leader, CQI plan lead, and data manager. Invite improvement advisors, supervisors, partners, frontline staff, or participant when their perspectives are relevant to the CQI cycle.



Ask: Who should be part of the core CQI team, and who should be invited for this specific CQI cycle?



Before the meeting: prepare for focused discussion



Before the meeting: Set the agenda, identify data or feedback to review, and invite the right voices

Routine: Share agenda and data in advance

1 Set the purpose

What question, challenge, or decision will the team focus on?

2 Bring the right information

What data, feedback, or input will help the team discuss the issue?

3 Invite the right voices

Who needs to participate or provide input to help the team understand the issue?



HMRF resource: Sample Meeting agenda



CQI Best Practices Series



OPRE report #2022-192

GRANTEE IMPLEMENTATION TEAM SAMPLE MEETING AGENDA [FOR USE BY HMRF GRANTEES]

Implementation Team Agenda Sample Template

A core function of implementation teams is to routinely review, analyze, and synthesize data. The draft agenda template below provides a framework for how implementation teams can review and analyze data to inform decision-making using the W³ (What, So What, Now What?) strategy.¹ At each meeting, the team should review relevant data and revisit previous improvement actions and goals.

Date and Time:

Phone Meeting or Meeting Location:

Attendees:

Regrets:

Facilitator:

Note Taker:

Time Keeper:

Objectives for Meeting:



During the meeting: Use “What? So what? Now what?”



During the meeting: Use a simple structure to review what happened, discuss what it means, and decide next steps.

Routine: Use “What? So what? Now what?”

1

What?

What are we seeing?

Review data, feedback, or observations.

- What stands out?
- What patterns or changes do we notice?
- What questions do we still have?

2

So what?

Why does this matter?

Discuss what the information means for the program.

- Why might this be happening?
- Who is affected?
- What are the implications for staff, partners, or participants?

3

Now what?

What will we do next?

Identify actions, owners, and timelines.

- What should we test, adjust, or monitor?
- Who will follow up?
- What will we review next time?

After the meeting: document decisions and follow through



After the meeting: Document decisions, action items, owners, and timelines.
Routine: Develop action/decision log and confirm next steps



Between meetings: Check progress, troubleshoot barriers, and gather feedback for the next discussion.
Routine: Schedule regular check-ins

Document the decisions

Capture:

- Learning
- Decisions made
- Actions needed and owners
- Timeline
- Next review point

Keep momentum between meetings

Check:

- Action item progress
- Barriers experienced
- Supports or resources needed
- New data or feedback
- Updates for next meeting



| CQI team communication

Use facilitation strategies to move from discussion to shared understanding when...



Reviewing data or feedback



Hearing different perspectives



Identifying questions or ideas



Building agreement on next steps



Facilitation strategies

Structure productive discussions

- Guide conversations around clear questions instead of jumping to solutions.

Encourage broad participation

- Use facilitation techniques that help everyone contribute, including quieter team members.

Build consensus

- Help the team prioritize ideas, reach agreement, and identify next steps together.

Choose a facilitation strategy

- Includes practical techniques such as Conversation Café, Shift and Share, and 1-2-4-All that can be adapted to your team's size and meeting style.

 CQI Best Practices Series



Facilitation Strategies for Fostering Discussion and Consensus

A high-quality continuous quality improvement (CQI) process needs curiosity and consensus building to identify and prioritize critical questions and solutions. At its best, CQI includes a variety of perspectives and experiences. But how do we make sure all voices are heard and everyone agrees on the way ahead? The following facilitation strategies¹ are examples of equitable processes to incorporate diverse perspectives, guide question development, and gain consensus and buy-in on prioritized areas for CQI.

FACILITATION STRATEGY	KEY POINTS	CONSIDERATIONS
CONVERSATION CAFE²	• State the theme of the conversation, usually in the form of a question. For example, "What are we curious about related to our program implementation? What would we like to learn more about from data?" (These become your "guiding questions.") • Explain there will be four rounds of conversation at every table: two rounds using the guided questions, a third round as open conversation, and a final round with the guiding questions. • Distribute talking objects (e.g., talking stick, pen, etc.) • Read the six Conversation Café agreements. See link provided. • Establish a volunteer host at each table. The host is a full participant whose role is to gently intervene only when a participant visibly fails to observe one of the six agreements, most frequently talking more than their share. • First round with the guiding questions (1 minute per person): each person shares what he or she is thinking, feeling, or doing about the theme or topic. • Second round with the guiding questions (1 minute per person): each person shares their thoughts and feelings after having listened to everybody at the table. • Third round (20 to 40 minutes): open conversation (option to use guiding questions). • Fourth round with the guiding questions (5 to 10 minutes): each member shares "takeaways."	• Helpful in facilitating listening • Helpful in sharing ideas in a safe space • Everyone is included; everyone can participate

[HMRF resource: Facilitation Strategies](#)



Create a plan for how the CQI team will communicate

- 1 Share what the team is learning**
Communicate key takeaways from nFORM, staff input, participant feedback, and partner perspectives so others understand what the team is seeing.
- 2 Explain what is changing**
Help staff, leadership, partners, and FPS understand what is being tested or adjusted, why the change is being made, and how it may affect their work.
- 3 Clarify what happens next**
Share decisions, action steps, timelines, and follow-up expectations so people know how to support implementation and stay engaged.



[HMRF resource: CQI Communication Protocol Worksheet](#)



Add your thoughts to the chat: (1 of 2)

What strategies or tools do you plan to use to help your team hear from different voices during meetings?



Add your thoughts to the chat: (2 of 2)

Which area is most important for your CQI team to focus on right now?

- Shared purpose
- Clear roles and responsibilities
- Meeting routines
- Communication practices
- We are still forming our CQI team
- Other



| Questions?

