Healthy Marriage and Responsible Fatherhood

Data Capacity and Continuous Quality Improvement (CQI) Plan Template

HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

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

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Instructions

The Administration for Children and Families (ACF) designed this template to help Healthy Marriage and Responsible Fatherhood (HMRF) grant recipients plan for continuous quality improvement (CQI) and data collection using nFORM. A thorough plan will help you and your team integrate CQI into program operations and collect, monitor, and report on high quality data. Your initial plan is due to ACF by [insert ACF due date]. Update your plan throughout your grant to reflect any updates to CQI, data collection, monitoring and reporting, and related staff training procedures.

Use the tables in each of the following sections to guide your team's planning. In section A, identify your HMRF grant's leadership team and target population. In sections B through E, document when and how your team will complete specific tasks and who will be responsible for them.

- **Section A: Program overview**
- **Section B: Data collection using nFORM**
- **Section C: Monitoring and reporting using nFORM**
- **Section D: Continuous quality improvement**
- **Section E: Staff training**

Use this template as a starting point and adjust it to meet your grant's needs—make it your own! Consider creating multiple plans if your organization has more than one HMRF grant, is serving multiple client populations, or is conducting a local evaluation.

A variety of CQI and nFORM resources are available on the HMRF Grant Resource site to help your team develop and implement your plan, including the nFORM User Manual and CQI plan worksheet. You also contact the help desk at nFORMCQITA@mathematica-mpr.com for additional assistance.

Review this plan with your grant team and your Family Assistance Program Specialist (FPS). Update your plan at least once a year and as needed, as your CQI and data collection processes evolve.

A. Program overview

Table A1. HMRF program overview

Who is on your program team?	Name
Grant recipient	Click or tap here to enter text.
Project director	Click or tap here to enter text.
Project manager	Click or tap here to enter text.
Data manager	Click or tap here to enter text.
CQI lead	Click or tap here to enter text.
External evaluator (if applicable)	Click or tap here to enter text.
What target population(s) is your program serving?	
Helping Every Area of Relationships Thrive (HEART)	☐ Adult individuals ☐ Adult couples
Relationships, Education, Advancement, and Development for Youth for Life (READY4Life)	☐ Youth in schools ☐ Youth in the community ☐ At-risk youth (including homeless youth and those in or aging out of foster care)
Family, Opportunity, Resilience, Grit, Engagement—Fatherhood (FORGE Fatherhood)	☐ Fathers in the community ☐ Reentering fathers

B. Data collection using nFORM

nFORM users must incorporate best practices for protecting client privacy into each stage of data collection. Consult the nFORM User Manual and guidance from your organization, partners, institutional review board (IRB), and local evaluators, as applicable

ACF requires all HMRF grants to use nFORM to collect information on the people they serve and the services they provide. nFORM is designed to capture all required HMRF performance measures while providing grant recipients flexibility to tailor the system to reflect their own program's offerings.

Use the tables in this section of the plan template to document key components of your grant's data collection approach, including early planning activities and equipment needs, data security, and step-by-step plans for collecting recruitment and enrollment data, administering surveys, and recording participation in workshops and individual services. Examples have been provided in select tables to help guide your understanding of the types and amount of information to record. If needed, grants can add rows and customize tables to best reflect their program's processes.

1. Preparing for data collection

Table B1. Early planning activities

Data collection overview	
Review the nFORM user account types in Module IV of the nFORM User Manual and determine which type of user account and level of access to data each staff member needs based on their role. Identify how many of each account type you will need to set up, and coordinate with your grant's initial nFORM site administrator to set up the accounts. Establish a routine schedule for review staff accounts and updating access permissions, as needed.	Site administrator Click or tap here to enter text. Case manager Click or tap here to enter text. General user Click or tap here to enter text.
In which settings will you enroll clients and administer entrance and exit surveys? *(Check all that apply)*	☐ Virtual ☐ In grant recipient offices ☐ In schools ☐ In correctional facilities ☐ Other *(please specify)* Click or tap here to enter text.

Data collection overview	
Identify each physical location where you will provide services and conduct in-person data collection, including the street address and contact phone number and email for each location. Set up a grant recipient location in nFORM for each physical location.	Click or tap here to enter text.
Does your organization, institutional review board (IRB), or evaluation partner require you to develop a consent procedure and obtain IRB approval before collecting data? ACF does not require this for collecting HMRF performance measure data but grant recipients must check with their own organizations and partners and obtain IRB approval before collecting data, if required.	☐ Yes ☐ No
As described in Module 1 of the nFORM User Manual, grants must immediately report suspected or confirmed cases of unauthorized nFORM access. Detail your plan to report nFORM-related security incidents to Mathematica and, if applicable, your own IRB.	Click or tap here to enter text.
ACF requires that grant recipients use nFORM to administer web surveys to clients unless your FPS provides permission to use paper surveys. Indicate whether you will administer web-based or paper surveys and, if applicable, why you plan to administer paper surveys.	☐ Yes ☐ No *(indicate why web-based surveys can't be administered)* ☐ No Internet access ☐ Restrictions on clients using laptops or tablets ☐ Other *(please specify)* Click or tap here to enter text.
Estimate the percentage of surveys you will need to administer in English and Spanish. (ACF provides web, Audio Computer-Assisted Self-Interview (ACASI), and paper surveys in English and Spanish. For other languages, grants should translate surveys in advance and then record responses in nFORM.)	English Click or tap here to enter text.% Spanish Click or tap here to enter text.% Other *(please specify)* Click or tap here to enter text. Click or tap here to enter text.%
Will you administer nFORM surveys to individual clients one-on-one, to multiple clients at the same time in a group setting, or in both types of settings? Check all that apply.	☐ Individual survey administration ☐ Group survey administration *If in a group,* how many clients will typically complete surveys at the same time? Click or tap here to enter text.

To maintain data security, **grant staff and clients must use separate devices**. Clients should only access the surveys, not other parts of nFORM. Clients may use their phones to complete surveys as well. Use Table C2 to identify your equipment needs for clients to complete surveys and staff to record information in nFORM. (Document plans to administer surveys in Table C4.)

Table B2. Data collection equipment needs

Type of equipment	
Based on your individual or group survey administration plans, how many tablets or laptops will you need for **clients** to complete surveys? Consider ordering backup equipment to minimize downtime in case a replacement is needed.	Click or tap here to enter text.
Obtain Jetpacks or mobile hotspots if you anticipate Internet connectivity issues or you do not have permission to use a site's connection. How many Jetpacks or hotspots do you need?	Click or tap here to enter text.
Order earbuds for clients so they can listen to survey questions using nFORM's ACASI feature, which allows clients to listen to recordings of survey questions and answer options. Make sure you have enough earbuds if you plan to administer surveys in group settings. How many earbuds do you need to order?	Click or tap here to enter text.
Approximately what percentage of clients may use screen readers or other assistive devices? What equipment or arrangements will they need?	Click or tap here to enter text.%
How many tablets or laptops will **staff** need to enroll clients, record services, generate survey passcodes, or enter survey responses? Consider ordering backup equipment to minimize downtime in case a replacement is needed.	Click or tap here to enter text.

2. Outreach and enrollment

HMRF programs can create nFORM records for potential applicants during the outreach and recruitment phase to help monitor recruitment efforts and track attrition from initial outreach through enrollment. Once an applicant is ready to enroll, grant staff complete the existing nFORM record and administer the Entrance Survey to complete the enrollment process. Grant staff also have the option of waiting until potential applicants are ready to enroll to set up their nFORM record. Module V of the nFORM User Manual provides detailed information about how to create these nFORM records. Document your approach in Table C3.

Table B3. Creating nFORM records

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?
Example: Search nFORM for existing record of potential applicant or enrollee	*During outreach and when applicant is ready to enroll*	*Intake coordinator*	*Intake coordinator will search nFORM for existing records for each name on referral records, interest forms from recruitment events, and paper applications.*
Search for existing records of potential applicants and people who are ready to enroll. <u>If no record exists</u>, click to create a new record, which opens a new application form. Select the applicable radio button to indicate whether you are creating a new record for a potential applicant, or for someone who is ready to enroll. <u>If a record exists</u>, open the existing application form and select the applicable radio button to indicate whether the potential applicant is still in the outreach phase, or is ready to enroll.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?
For either status (outreach or ready to enroll), offer the Privacy Statement, complete the required fields, and save the form. Navigate to the client profile to assign case managers and enter service contacts or referrals. For someone who is ready to enroll, administer the entrance survey to complete enrollment.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

3. Administering entrance and exit surveys

Grant staff administer the **Entrance Survey** when applicants have completed the intake process and are ready to enroll in the HMRF program. nFORM sets the enrollment date as the Entrance Survey completion date. Grant staff administer the **Exit Survey** to clients at the end of their last workshop session. Because ACF requires workshop sessions to last at least two weeks, nFORM will not allow grant staff to launch the Exit Survey less than 14 days after the Entrance Survey.

Module I of the **nFORM User Manual** covers client confidentiality and data security, and Modules V and VII detail how to use nFORM to administer client surveys. Prepare for each survey administration well in advance so you can start and finish on time, secure enough space to maintain client privacy, and provide activities for clients who finish early. Document your survey administration plans in Table C4. Entrance and Exit Surveys follow the same administration process using nFORM, but you can adapt Table C4 as needed for each type of survey.

Table B4. Administering surveys

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?
Example: Prepare the equipment that clients will use to complete the survey.	*Upon enrollment and at the end of the last workshop session*	*Intake coordinator and facilitators*	*By COB each day, the intake coordinator and facilitators will charge all tablets so they are ready for survey administration the next day. During intake, the intake coordinator will provide the applicant with a tablet and their unique link to complete the Entrance Survey. At the last workshop session, after the lesson ends, facilitators will pass out tablets and earbuds and give each client a unique survey link. Staff will collect tablets and earbuds after surveys are completed and wipe them down.*
Develop detailed scripts so that staff use consistent messages to introduce the surveys; explain how to use the tablets, laptops, or phones clients may use to complete surveys; and provide timelines to clients. See the Tips for Survey Scripts resource for information on how to develop a script for introducing the survey to clients.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Prepare the equipment that clients will use to complete the survey. In advance, bookmark the survey URL on each device and include the URL as a shortcut/icon so it is easier to find. When administering surveys, turn on each device, open the bookmarked URL, and plug in earbuds. Clean all equipment with disinfecting wipes.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?
Generate a survey passcode for each client and record it with the client ID number on separate index cards or notepaper to hand to each client. If clients are completing the survey by phone, also include the survey URL or provide them with the Survey Link and QR Code handout. If you are administering surveys in groups, use nFORM's bulk survey passcode feature to generate passcodes for multiple clients.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Hand out tablets or laptops and earbuds to clients and read the survey script. Give each client their client ID and survey passcode.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Ask clients to return their device (if applicable) to program staff or raise their hand to signal when they are done. Look at the device screen to confirm that the survey has been submitted. If not, ask the client to finish and submit the survey.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Plan for and conduct follow up with clients who have not completed their surveys, including clients who have left the program. Consider how you will reach out to clients to ask them to complete the surveys. Plan to contact clients in multiple ways, such as by phone call, text, email, or in person.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

4. Recording individual services and participation in workshops

All HMRF grant-funded services should be recorded in nFORM as they occur. Module VI of the nFORM User Manual describes how to set-up workshops and session series in nFORM and record participation in them; Module VII describes how to record receipt of individual services. Grant staff can record individual services for both potential applicants and enrolled clients but can only provide workshop services to enrolled clients. Document your approach in Table C5.

Table B5. Recording receipt of individual services

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?
Example: Record individual service contacts	*The day the contact was provided*	*Case manager*	*At the end of each day, case managers will review their assigned clients in nFORM to confirm that all individual service contacts provided that day are entered.*
Record individual service contacts and referrals in nFORM when each is provided. (Module III.D of the nFORM User Manual describes how to add service providers to which clients are referred for services.)	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Record in nFORM whether potential applicants and clients follow up on referrals provided by grant staff.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Record incentives and program supports in nFORM whenever incentives and program supports are offered to clients.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Send clients reminder contacts and encourage them to attend workshop sessions. Ensure clients receive information on the dates, times, and locations of all workshop sessions (and virtual connection information, if applicable). Record those in nFORM as reminder service contacts.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Table B6. Recording participation in workshops

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?
Example: Register clients for the series	*2 days before the first class*	*Intake coordinator*	*Two days before the start of a workshop series, finish registering clients, print the roster, and send reminders.*
Before the first session, **use nFORM's registration feature to register clients** for workshop series where registration is required.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Generate the attendance roster from nFORM before each class and **use it to manually record attendance during each class.**	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Enter the workshop session attendance in nFORM immediately after each class, then securely shred the paper roster.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

C. Monitoring and reporting using nFORM

HMRF grants should actively monitor their data to support program operations, identify data quality issues, track progress toward targets, and drive improvement efforts. nFORM provides numerous reports and data tools, listed in the table below and in Module VIII of the nFORM User Manual, to support program monitoring; use Table D1 to document plans for using them. When developing your monitoring approach, consider the pace of client enrollment and the frequency of services you are providing to plan how often you will review each report and data tool. In your plan, document how you will maintain client confidentiality when using nFORM reports and data tools. nFORM client profiles and some reports contain personally identifiable information that must be safeguarded to protect client confidentiality. Module I of the nFORM User Manual has detailed guidance on how to maintain client confidentiality and data security.

Table C1. Monitoring nFORM data

What needs to be reviewed?	When will we do it?	Who is responsible?	How will we support improvement and accountability needs?
Example: Survey Completion Summary	*After administration of each survey*	*Facilitators*	*Review report and plan outreach to clients who have not completed surveys. If the completion rate falls far below targets, the program will flag the issue for the CQI team.*
Outreach summary/detail reports to track potential applicants to the program	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Client Status summary/detail reports to confirm who has completed enrollment, and other client statuses	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Phone Number and **Email Address** reports to follow up with clients	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Survey Completion summary/detail reports to identify how many and which clients have completed Entrance and Exit surveys; **Paper Survey** and **Refused Survey** reports to monitor survey data entry and refusal rates by survey type and reason	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

What needs to be reviewed?	When will we do it?	Who is responsible?	How will we support improvement and accountability needs?
Local Evaluation Enrollment summary/detail reports to confirm which clients have been enrolled in the local evaluation and their service assignments (if applicable)	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Caseload Summary summary/detail reports to monitor how many and which clients are assigned to each case manager	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Individual Service Contacts summary/detail reports to monitor number and types of ISCs provided	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Incentives summary/detail reports to monitor number, value, and types of incentives provided	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Zip Code report to identify which areas clients reside in	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Series Session Attendance report to monitor attendance at workshop sessions	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Primary Workshop Participation summary/detail reports to view number of primary workshop hours clients attended and assess progress toward primary workshop targets	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
School Year Performance Summary report for READY4Life grant recipients to monitor progress on PPR performance measures on an academic calendar	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
User Account Activity report to monitor staff access to nFORM.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

What needs to be reviewed?	When will we do it?	Who is responsible?	How will we support improvement and accountability needs?
Client profiles to review demographic information and service delivery records.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Query Tool to track, monitor, and analyze client progress; up to three nFORM users at each grant can access the query tool	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Data Export to conduct in-depth analysis of all data recorded in nFORM, excluding personally identifiable information; only site administrators can generate data exports and exports should be securely stored. Describe where and how exports will be securely stored when generated and for how long. Note that exports must be encrypted and stored in access-controlled systems.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

ACF requires HMRF grant recipients to submit annual performance progress reports (PPRs) by October 30th of each grant year to describe program activities, performance, and improvement efforts. Module VIII.A of the nFORM user manual provides more information on completing and submitting PPRs. Document your approach in Table D2.

Table C2. Reporting HMRF performance measures to ACF

What needs to be done?	When will we do it?	Who is responsible?	What's the plan to support improvement and accountability needs?
Example: Complete annual Program Operations Survey	*By October 15*	*Program manager*	*Review noted implementation challenges for discussion in progress narrative, and flag for the CQI team.*
Complete annual **Program Operations Survey**	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Draft **progress narrative**	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

What needs to be done?	When will we do it?	Who is responsible?	What's the plan to support improvement and accountability needs?
Generate PPR before due date, to allow time for review before submission to ACF	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Submit **PPR** to Grant Solutions	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

D. Continuous quality improvement

Continuous quality improvement (CQI) is the process of identifying, describing, and analyzing program strengths and challenges, followed by testing, implementing, learning from, and revising solutions. CQI is data-driven and linked to a program's goals and objectives. Grant recipients should use nFORM data (and other sources of information as needed) to identify challenges and monitor if new strategies are helping to address those issues. ACF requires all HMRF programs to develop, implement, and update plans for conducting CQI throughout their grants. ACF has developed a CQI process, this plan template, and a range of resources, available on the HMRF Grant Resource site and on OPRE's CQI resource site, to support HMRF grants in their CQI efforts.

In this section of your data capacity and CQI plan, describe your CQI implementation team structure and approach to conducting CQI, including how you will use data to inform CQI. Use Section E to describe staff training related to CQI. You may use the optional CQI worksheet to plan and document specific CQI cycles.

1. CQI implementation team structure

To best support improvement efforts, your CQI implementation team should function separately from programmatic teams but coordinate with them on specific improvement efforts. The HMRF CQI implementation teams tip sheet describes the purpose of a CQI team, who should be on it, and tips for managing the team. Your CQI team will ideally include key members identified in Section A of this plan—your HMRF project director, project manager, CQI lead, and data manager—who will remain consistent throughout the grant to facilitate coordination and provide context and historical knowledge. Your **project director** and **project manager** are responsible for ensuring that CQI is well-planned and integrated throughout the program and that staff are supported in CQI efforts. Your **CQI team lead** manages every aspect of CQI cycles, including documentation of plans and progress, team meetings, and sharing improvements with key audiences. Your **data manager** will oversee the program's data collection and monitoring activities and will thus be integral to your program's CQI efforts.

Your CQI team should also include individuals who can (1) contribute their firsthand perspectives about specific challenges and help brainstorm potential solutions (**improvement advisors**), such as program facilitators, case managers, or partner staff; and (2) who can oversee and support staff as they try out new strategies during a CQI cycle (**supervisors**). In Table B1 below, please identify how improvement advisors and supervisors will be represented on the CQI team. For instance, you may want the perspectives of a consistent group of staff for every CQI cycle, or you may rotate staff depending on the topic. You can also consider having partners, clients, or community members on your CQI team. Keep in mind that supervisors will be more effective if they have supervisory responsibility for those implementing the strategy.

Table D1. CQI team structure

Team role	Example	Positions represented (write roles or names)
Improvement advisors	*We will rotate advisors based on the focus of each CQI cycle. Two to three frontline staff (such as facilitators, case managers, employment specialists, or recruiters) will advise on challenges and strategy development and implementation.*	Click or tap here to enter text.
Supervisors	*We will also rotate supervisors based on the CQI cycle. Two supervisors of relevant frontline staff will oversee and support strategy implementation.*	Click or tap here to enter text.

CQI teams are encouraged to review the HMRF CQI implementation team agreement worksheet, which includes considerations for how teams can function successfully over the course of the grant. Document your CQI team's meeting and communication protocols in Table B2 below.

Table D2. CQI team protocols

Protocol	Example	Response
How often will your CQI team meet? (ACF recommends biweekly or monthly meetings.) Use the HMRF CQI sample team meeting agenda to prepare for each meeting.	*We will meet every other Tuesday afternoon. The CQI team lead will prepare and distribute meeting agendas and summaries.*	Click or tap here to enter text.

Protocol	Example	Response
How will the CQI team communicate between meetings?	*The CQI team lead will check in by phone and email between meetings, to make sure efforts are progressing.*	Click or tap here to enter text.

2. Approach to conducting CQI

The CQI process can help your team break down challenges and address them in a targeted, efficient way. ACF's HMRF CQI process includes five steps to help your team organize and manage each CQI cycle. In Table B3 below, describe your team's general approach to each step in the HMRF CQI cycle, including who will be responsible and when and how the team will get it done. For each step, describe how your team will use data, including staff and participant feedback, to inform CQI. These steps are useful to consider even if your team uses another CQI process (such as Plan Do Study Act [PDSA]). Your team can use the optional CQI worksheet to plan and document specific CQI cycles.

Table D3. CQI approach to steps in HMRF CQI cycle

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?
Example: *Step 1. Identify an area to improve and set a goal*	*Monthly*	*CQI lead*	*We will monitor key targets monthly to be sure we are on track; in addition, we will monitor feedback from participant and staff satisfaction surveys every six months, flag challenges, and set SMART goals.*
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.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Step 2: Identify a strategy. Develop new strategies to address identified challenges. Describe how you will identify strategy ideas to try.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
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.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Step 4. Monitor outcomes. Determine whether CQI improvement strategies support the improvement your team was expecting by monitoring progress toward your SMART goal.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?
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.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

E. Staff training

In Table E1, describe how you will train staff on nFORM and data collection and CQI procedures at the start of the program and as new staff join your team. Also describe your approach to conducting refresher trainers. Consider which modes of training will work best in an ongoing way (such as virtual, in person, or videos), and how to incorporate practice sessions and resources into your data capacity and CQI training plans. Be sure to update any initial training materials based on changes.

Table E1. Conducting staff trainings

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?
Example: Conduct initial staff training	*In March 2026, prior to program launch*	*Data manager*	*Data manager will train all program leaders, recruitment staff, intake coordinators, case managers, workshop facilitators, and others on how to use nFORM to enter program and client data, complete required reports, and access and monitor data.*
Conduct initial staff training on entering and reviewing data in nFORM. Prepare any needed training materials and schedule and conduct trainings. All grant staff with nFORM accounts should also attend the nFORM/CQI welcome week.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?
Prepare for and conduct initial staff training on CQI. Prepare any needed training materials and schedule and conduct trainings. CQI team members should also attend the nFORM/CQI welcome week.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Conduct refresher trainings for staff periodically, and whenever updates are made to data capacity and CQI plans.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Conduct initial trainings for new hires as part of their onboarding.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.