

# CQI Community Group

Strategic Plan Overview  
April 10, 2026

# Strategic Planning Process

- 2024 SWOT
- 2025 SWOT prioritization - determined need for strategic planning facilitator
- 2025 CQI Community Group survey
- 2026 Steering Committee discussion and plan review

# SWOT Analysis

## Strengths & Opportunities

- Networking
- Best practices
- Diverse expertise
- Volunteer commitment
- Educational offerings
- Responsiveness
- Unique hub
- Growth & support

## Weaknesses & Threats

- Funding
- Quantity v quality
- Scope of membership
- Capacity
- Technology
- Management
- Competition
- Perception of CQI

# What Questions the Plan Answers

## **(Re)defining the CQI Community Group**

- Common language of how you speak about the group and its members
- Identifying key audiences
- What the CQI Community Group is and what it is not
- Why you do what you do and where you're headed

## **Envisioning the ideal partnership**

- Looked at current support and listed desired support
- Considered types of organizational formalization and pros and cons of each (more research and discussion needed)
- Why formalize/raise money - for what purposes?

## **Capacity Building & Strategic Focus**

- How can the CQI Community Group be responsive to meet the evolving needs of CQI professionals?
- How can the CQI Community Group grow sustainably?
- How do you measure success and what needs do you have?

# What We Learned from the Survey

## Current Involvement

### 1) Virtual events

98% active/interested

### 1) Annual CQI conference

96% active/interested

### 1) Social media community

73% active/interested

### 1) Mentorship program

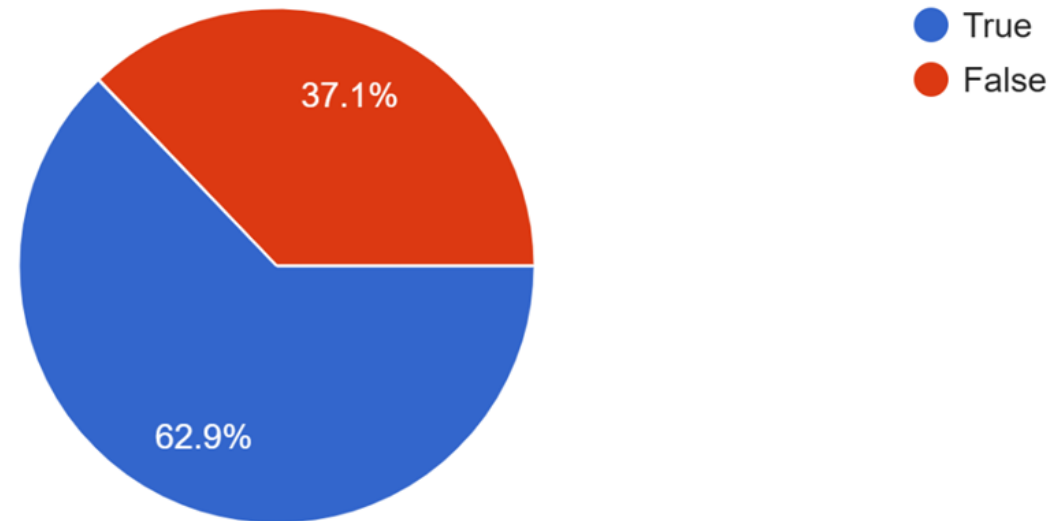
64% active/interested

## Barriers to Involvement

- Don't know enough about offerings or unsure how it connects to current role
- Meeting times inconvenient or haven't been asked to participate

It is important to me that the CQI Community Group provides formalized training that could lead to a professional credential.

105 responses



- Willing to pay for select trainings/courses but strongly believe membership should remain free/accessible
- Ideas include:
  - CQI 101
  - Offerings related to different levels of employment/expertise
  - Potential credential

# Strategic Positioning: Pre-Plan

## **Mission**

What you do

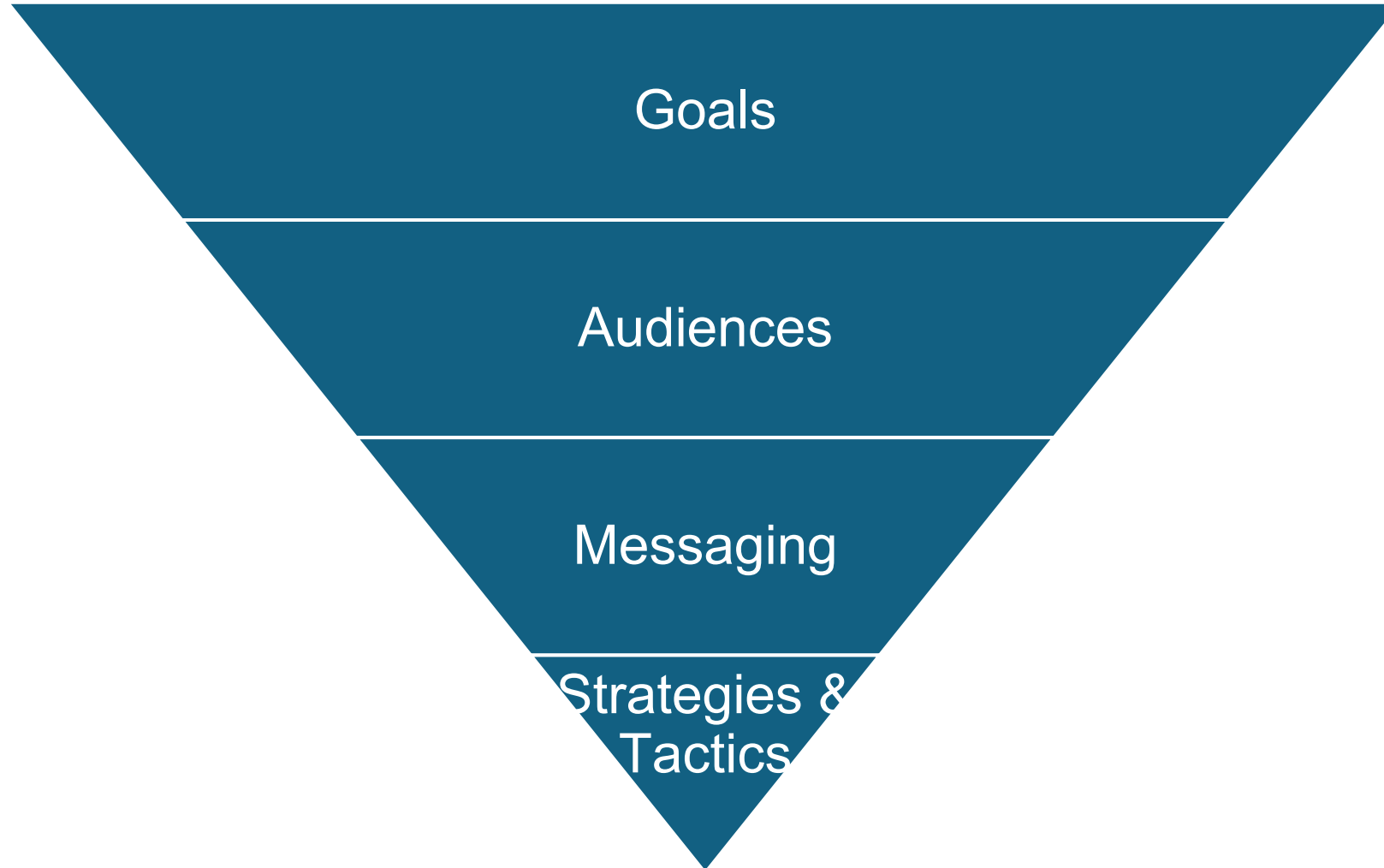
## **Vision**

Why you do it

## **Values**

How you do it

# The Makings of a Strategic Plan



# Mission & Vision

**Mission:** The CQI Community Group is a national collective of Continuous Quality Improvement (CQI) leaders and learners building capacity for their organizations to meet the needs of the people they serve.

**Vision:** To champion CQI work as essential to driving full-spectrum, human-centric decisions.

**Boilerplate:** The CQI Community Group is a national collective of Continuous Quality Improvement (CQI) leaders and learners building capacity for their organizations to meet the needs of the people they serve. The CQI Community Group provides professional development and peer support through virtual events, an annual conference and mentorship program. To learn more, visit the CQI Community Group's [website](#).

# Values

## Community-centered

- Supportive
- Dedicated
- Ongoing engagement

## Accessible

- Free to join/participate
- Shared resources
- Affordable offerings

## Peer-led Expertise

- Best practices come from experience
- Direct, actionable, adjustable takeaways

# Goals & Strategies

## Goal #1: Ensure the longevity of the CQI Community Group as an organization

1. Formalize Structure
2. Consistent Branding
3. Build Internal Capacity
4. Bolster Funding, Reduce Costs

## Goal #2: Increase engagement of CQI Community Group membership

1. Strengthen Member Communications
2. Program Accessibility for Member Participation

## Goal #3: Elevate the impact and practice of CQI as a profession

1. Build Up Training Offerings
2. External Communications

**Goal #1: Ensure the longevity of the CQI  
Community Group as an organization**

# Goal #1: Ensure the longevity of the CQI Community Group as an organization

## 1.1: Formalize Structure

- Consider the pros and cons of various organization formats and set decision date
- Schedule a meeting with new university leadership to discuss partnership successes, opportunities and needs

# Goal #1: Ensure the longevity of the CQI Community Group as an organization

## 1.2 Consistent Branding

- Develop logo that includes the full group name: “CQI Community Group”
- Consider tagline
- Consistent colors for both conference AND ongoing events
- Clear, easy to remember website URL
- Email signature block option for committee members
- Look at current branding guide and update
- Update current templates

# Goal #1: Ensure the longevity of the CQI Community Group as an organization

## 1.3 Build Internal Capacity

### a) Steering Committee Operations

- **Develop informal bylaws**
  - Set term limits
  - Detail decision matrix
  - Requirements/procedures for position eligibility, resignation, removal or vacancies
  - Develop relevant financial policies
- **Succession planning**
  - Consistently identify and train potential new committee chairs, committee members and co-coordinators
  - Develop onboarding process for roles mentioned above
  - Standardize documentation for easy reference
  - Crisis planning protocol for emergencies

### b) Community Membership Support

- Onboard new community members
- Provide virtual orientation/presentation skills training ahead of the conference and virtual events

# Goal #1: Ensure the longevity of the CQI Community Group as an organization

## 1.4 Bolster Funding, Reduce Costs

- Annual Conference
  - Convert companies/institutions who participate into sponsors/donors
  - Provide virtual-only rate available post-conference
  - Consider hosting in-person conference every other year
- Develop case for support for ongoing sponsorships & grants. Funds can support:
  - Internships
  - Stipends for mentors and other active volunteers
  - Scholarships for annual conference, other paid offerings
  - Contract/freelance support



**Goal #2: Increase engagement of CQI  
Community Group members**

# Goal #2: Increase engagement of CQI Community Group members

## 2.1 Strengthen Member Communications

### a) Define and refine membership

- Distribute a demographics survey for a full understanding of who makes up the community
- Define community tiers and expectations

### b) Develop touchpoints to move members up community tiers

- Website:
  - Build out web page to better tell the CQI Community Group's mission and purpose, history and offerings
  - List co-coordinators, committee chairs and members, ways to get involved
  - Automate applications/forms

# Goal #2: Increase engagement of CQI Community Group members

## 2.2 Program Accessibility for Member Participation

- Virtual events:
  - Record virtual events for playback
    - Develop guidelines for recording, gathering consent, etc.
  - Offer “encore” presentations of conference sessions
  - Offer additional time zone options for replay for more attendance
- Mentorship program:
  - Refine criteria for mentors to encourage more participation
  - Personally invite/nominate people to be mentors

**Goal #3: Elevate the impact and practice of CQI as a profession**

# Goal #3: Elevate the impact and practice of CQI as a profession

## 3.1 Build Up Training Offerings

- Begin building video library, look at past conferences/virtual events
  - Organize content by level, practice area
  - Collect older presentations/topics for historical information and possible updating for use
  - Identify gaps for further development
- Potential offerings:
  - CQI 101
  - Data literacy: measurement procedures, visualization
  - Job shadowing
  - Toolkits development

# Goal #3: Elevate the impact and practice of CQI as a profession

## 3.2 External Communications

- Encourage partners and sponsors to
  - Share information about the group to their employees
  - Post a CQI Community Group “badge” on their website
  - Share posts on social media
- Media relations to tell the CQI Community Group’s story
  - Use CQI Annual Conference session highlights to showcase expertise in various sector areas
  - Promote member publications, awards
- Advocacy for CQI funding, positions, education and training

# Timeline: 2026

## Q2 2026

### Steering Committee

- Meet with outgoing university leadership (set for **May 1**)
  - **April:** Draft an agenda and outline for discussion, identify opportunities to raise and research needed in preparation
- **June:** Define membership tiers

### Budget & Finance

- Ask returning/participating companies & institutions to sponsor/donate to annual conference

## Q3 2026

### Conference & Events

- Presentation orientation/skills training
- Offer additional options for virtual events

### Steering Committee

- Research and discuss internally about formal organizational direction (target decision by EOY)
  - Identify options to research and subcommittee to discuss and present findings
  - Present research and recommendations
  - Review, discuss and vote

# How We'll Measure Plan Success

## Goal #1

- # of sponsors/donors
- Avg. amount of sponsorship/donation
- # of conference registrations
- # of organizations represented at conference
- # of returning individuals/organizations at conference
- # of grants applied for / secured

## Goal #2

- Email subscribers, open rates/clicks
- Website, social media stats
- Events Air engagement
- # of states represented at virtual events & conference
- # of attendees at virtual events & conference
- Participants in mentorship program

## Goal #3

- Views/downloads on resources, trainings
  - Evaluations if used learnings from trainings, quality
  - Once paid offerings developed, how many purchases/revenue, registrants/attended/completed
- # of organizations sharing the CQI Community Group badge on their websites
- # of organizations sharing about the CQI Community Group on social media
- # of media stories about the CQI Community Group

# Questions/Discussion