

# Tailoring nFORM For Your Grantee

May 10, 2022  
nFORM 2.0 Team  
Mathematica

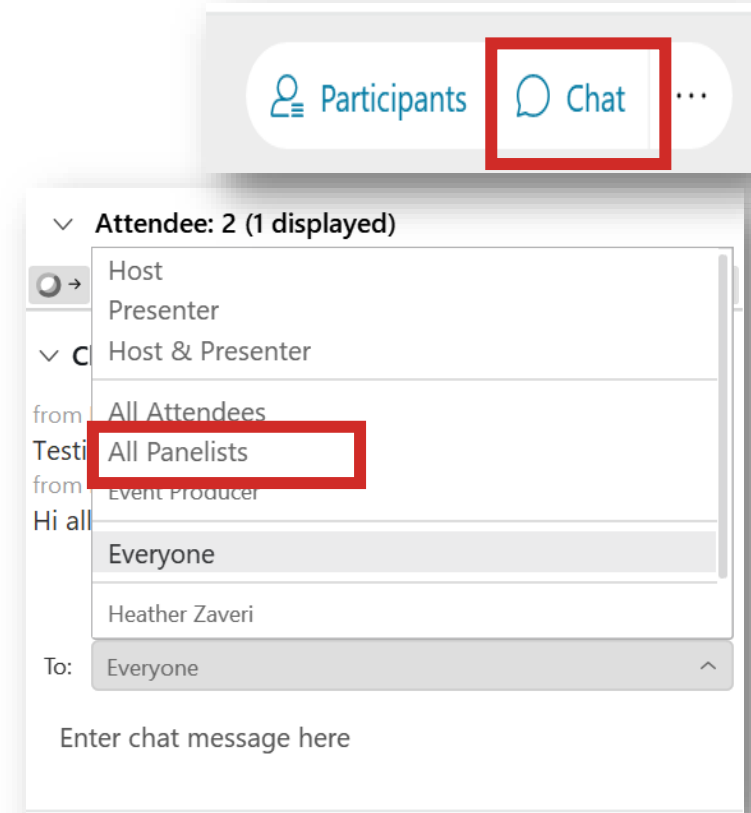
**OFFICE OF FAMILY ASSISTANCE**

An Office of the Administration for Children & Families



# Housekeeping

- / **Use the chat to ask questions**
  - Select “All Panelists” to submit questions
- / **Click on the link in the chat to access closed-captioning**



# REMINDERS:

- / Never text or email personally identifiable information (PII) like client names – *including to the help desk***
  - Only refer to clients in emails by their client ID number
- / Never take screenshots of client PII from nFORM**
- / Everyone who interacts with client data should:**
  1. Watch the Keeping Data Secure training video on the help page
  2. Review the Performance Measures and Data Collection Logistics Manual on the help page for more information on keeping data secure



# Today's topics

- / Opportunities to enter grantee-specific information in nFORM**
- / Using grantee-specific nFORM data to support program monitoring, CQI, and evaluation**
- / Updated guidance from OFA on recording individual service contacts (ISCs) provided before enrollment**



# HMRF resource site updates coming this month!



## / Enhanced functionality to search for CQI and nFORM 2.0 resources based on your questions or topics of interest

- Quick links to commonly used resources
- Search function by keyword, type, or topic of resource



# Tailoring nFORM

# Overview of grantee-specific options

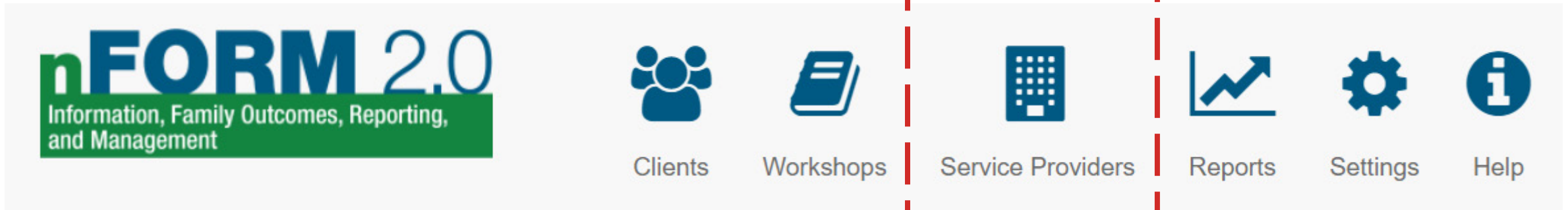
**Tailor select  
nFORM fields to  
more closely  
monitor service  
delivery and  
program operations**

## **/ nFORM fields**

- Service providers
- Locations
- Workshop, session series, and session names
- Service assignment names

## **/ Use tailored nFORM fields to support program monitoring, CQI, and evaluation**

# Custom directory of service providers



- / Enter service providers to develop a directory of organizations that clients are referred to for services**
  - Indicate which agencies are partners
- / When recording referrals, select service provider that the client was referred to**



# Entering new service providers

## G5. Add/Edit Service Provider



\* Indicates required field(s)

\* Name

Check here if provider is a partner agency [?](#)



Website

### Physical Location

Street (Line 1)

Street (Line 2)

City

State

Zip

### Mailing Address

Same as physical location

Street (Line 1)

Street (Line 2)

City

State

Zip

### Key Personnel

#### Contact #1

*Phone or email is required*

\* First Name

Phone

\* Last Name

Ext.

Email

Check if Primary Contact

[+ Add Contact](#)

# Entering new service providers (continued)

## \* Services Provided (Check all that apply)

### Assessment

- Comprehensive Assessment
- Employment/Job Readiness
- Other Targeted Assessment

### Child Support/Custody/Visitation

- Establish/modify child support order
- Establish/modify child visitation order
- Establish/modify child custody order
- Establish/modify parenting plan
- Child support arrearages assistance
- Establish paternity
- Couple mediation

### Child Welfare Services Involvement ?

### Domestic Violence/Intimate Partner Violence ?

### Financial Counseling

### Education

- English for Speakers of Other Languages (ESOL)
- General Educational Development (GED)
- Licensure/Certification (specify)
- Other Education (specify)

### Family Therapy/Counseling Referral

### Job/Career Advancement

- Career planning
- Employment resources ?
- Job search assistance ?
- Resume development

### Legal Assistance Referral

### Health/Mental Health Support

- Medical/Dental/Wellness
- Mental Health Referral
- Substance Abuse Referral
- Health Insurance

### Parenting ?

### Social services/Emergency needs

- Housing/Rent Assistance
- Childcare Assistance
- Clothing (not job related) ?
- Public assistance/welfare ?
- Food Assistance
- Obtain driver's license/state ID/birth certificate/other identifying documents
- Other social services/emergency needs (specify)

### Healthy Marriage and Relationship Education Services ?

### Other Referral (specify)

### Youth services (specify)

Check here to indicate Inactive



# Sample service provider directory

[+ Add Service Provider](#) Items per page 10

View	Name	Services	Contact	Phone	Email	Partner Agency
<input type="button" value="View"/>	One Stop Employment Center	Career planning, Employment resources, Job search assistance, Resume development	Wanda Rodriguez	(201) 555-1212		Yes
<input type="button" value="View"/>	Youth Development Corp.	Comprehensive Assessment	John Smith	(212) 555-1212		-
						2 Record(s)

# Using service provider information to support program monitoring and CQI

## Review information in the data export on:

### 1. Service providers tab

- Includes detailed information about each provider including location, contact information, available services, and whether they are a partner agency
- Analyze whether current list of service providers aligns with issues and needs discussed during individual service contacts (ISC data available on service contacts tab of data export)

### 2. Referrals tab

- Includes which service provider each referral is provided for
- Review the level of referrals being provided to each agency

# Specifying locations

- / **Enter individual sites for grantees that offer services in more than one location**
  - Enter a name and additional information about the location (optional)
- / **Assign nFORM users and clients to a specific location to more closely track program data**
- / **Enter location names for workshop series also**

G2. Add/Edit Grantee Location ✕

\* Indicates required field(s)

\* Location

Additional  
Information

# Using location information to support program monitoring and CQI



# Using location to narrow in on recruitment challenges



## Identifying challenges: Target population

- Bright Beginnings aims to serve young mothers ages 18-24. They flag target population as an issue when they notice on the query tool Applicant Characteristics tab that only 68% of participants fall into that age range.
- They review enrollment by location and age by using the data export's survey response data tab, and they determine the issue is not program-wide but rather localized to one site.
- This insight allows the program to focus on improving outreach efforts to their target population in just one neighborhood rather than expending efforts across its whole service area.

# Using location to assess progress on an attendance strategy



## Monitoring progress: Attendance

- Bright Beginnings tested a strategy to enhance primary workshop attendance at one site as part of a pilot road test
- The test goes well, but they want to monitor influence on primary workshop attendance over time
- By using the location variable on the primary workshop summary and detailed report, they can examine attendance for just the site experiencing the new strategy to assess promise



# Entering descriptive workshop, session series and session names

/ **Create workshop, session series, and session names that clearly communicate workshop information**

/ **Use descriptive session series titles such as:**

- “Northside – May 2022 cohort”
- “April 4 – May 26 2022 Virtual Evenings”

/ **Session names can be helpful to describe the lesson number or content provided in a single class**

- For example, “Lesson 1 (Introduction) and Lesson 2 (Communication Styles)”

W9. Track Session Attendance

\* Indicates required field(s)

Workshop Name	Elevate
Session Series Name	1/7/2019 start date
Workshop Total Hours	<input type="text" value="5"/> hours
Current Series Duration	<input type="text" value="8"/> hour(s) and <input type="text" value="20"/> minutes

Occurrence Details

Edit



Session Name

Lesson 1|

\* Session Date

7/7/2021

# Using workshop names to support program monitoring and CQI

## / Use workshop and series names as a filter for generating and analyzing operational reports

- Phone Number, Series Session Attendance, Survey Completion Summary, and Zip Code Reports
- Descriptive series names help users easily identify specific series

## / Create session series titles with end dates to more easily identify which series have ended or are in progress

- Drill down on primary workshop participation in the Query Tool by workshop and session series
- Conduct workshop participation analyses using workshop, series, or sessions as a variable in the operational reports and data export

# Using workshop name to isolate survey completion issues



## Identifying challenges: Survey completion

- Bright Beginnings identifies low survey completion as a problem on the Query Tool's Grant Year Overview tab and the Survey Completion Summary operational report
- By filtering the Survey Completion operational report, they notice a trend that low completion is most prevalent in workshops with a label of "virtual"
- The team changes their process to help virtual students complete exit surveys online during the final class, rather than emailing links post-class

# Exploring how lesson engagement influences attendance



## Monitoring progress: Lesson engagement

- Through a focus group, Bright Beginnings learns that lessons 6 and 7 don't seem to resonate with clients, which helps to explain a dip in attendance midway through the 13-lesson workshop
- They make allowable adaptations to the lessons so that scenarios and activities feel more applicable
- Using the Session Attendance tab on the data export, the team is able to monitor attendance by lesson to understand whether strong attendance sustains with the lesson improvements

# Creating service assignment names

- / **For grantees conducting local evaluations, using descriptive service assignment names can provide more information up front about the assignment than the category alone**
- / **Enhances ability to monitor for data quality**
  - For example, users can filter by service name to make sure clients are (or are not) receiving services associated with their service assignment

G3. Add/Edit Service Assignment ×

\* Indicates required field(s)

\* Service Name

\* Service Category

\* Description of Service to be Provided

# Using location and service assignment names to support evaluations

- / Review enrollment information for individual service assignments in the Local Evaluation Enrollment report**
  - This report presents enrollment by service assignment by location
- / Applicant characteristic data by service assignment name can be reviewed on the Applicant Characteristics tab of the Query Tool**
- / Filter by service assignment name and location on any tab of the data export with client information**
  - For example, analyze survey information by these two variables on the Survey Response Data tab

# Local evaluation enrollment report

## Local Evaluation Enrollment\* from 4/1/2021 - 4/28/2022

Grantee Name	Site Name	Total	Control (NO Services Provided)	Control (With Services)	Control Waitlist (NO Services)	Control Waitlist (with Services)	Treatment	
Cloud Grantee 1 RF (LE)			Control No Services	Control (With Services)	Control Waitlist (No Services)	Control Waitlist (With Services)	Enhanced Services Plus Job Club	Treatment Services
	<b>Total</b>	<b>123</b>	<b>4</b>	<b>19</b>	<b>1</b>	<b>7</b>	<b>12</b>	<b>80</b>
		54	4	11	1	5	2	31
	Southeast Side	69	0	8	0	2	10	49

\*Includes ONLY clients who completed enrollment and whose client status is NOT Duplicate confirmed, Duplicate pending, or Consent revoked.

## Cloud Grantee 1 RF (LE) Service Assignment Group\* from 4/1/2021 - 4/28/2022

Client Grantee Location	Client ID	Couple ID	Client Last Name	Client First Name	Service Name	Service Category	Enrollment Date
Northside	10032163		Smith	John	Control (With Services)	Control (With Services)	9/1/2021
Southside	10032165		Smith	Jane	Control (With Services)	Control (With Services)	12/3/2021

**Current Selections**  
 Grantee Name Cloud Grantee 1 RF (LE)  
 PopulationName Community individual  
 Characteristic Age

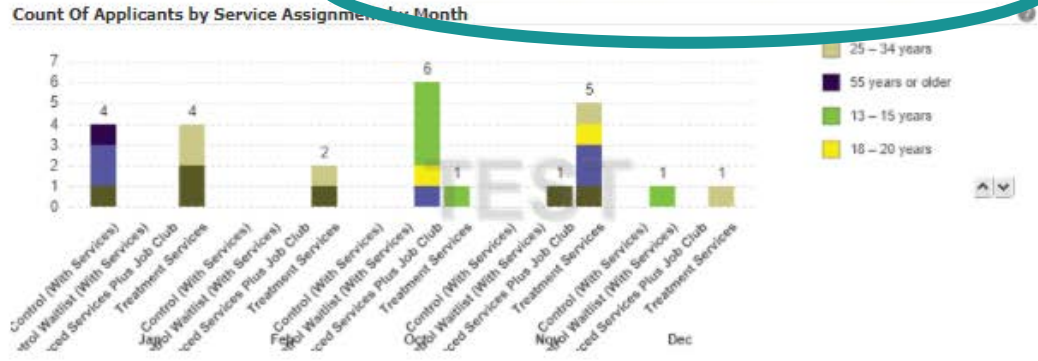
- Characteristic
- Age
  - Employment Status
  - Ethnicity
  - Gender
  - Partner Status
  - Race

Filter by enrollment date

Filter by applicant characteristic (as reported from ACS responses)

Analyze applicants by selected characteristics and time frames. Select characteristics of interest from the menu at left. Select specific calendar years or months above to display characteristics for that time frame. This tab displays data for all client populations served by the grant. Each partner in a couple is counted separately on this tab since data are based on individual survey completion. For grantees conducting local evaluations, this tab displays data for clients in all service assignments; other tabs in the query tool only display data for treatment, control (with services), and control waitlist (with services) group clients. Grantees that serve multiple populations can view data for each population by selecting the applicable buttons above.

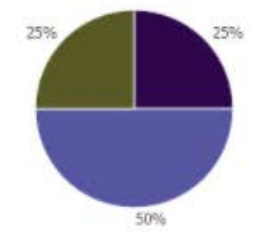
APPLICANT CHARACTERISTICS BY SERVICE ASSIGNMENT



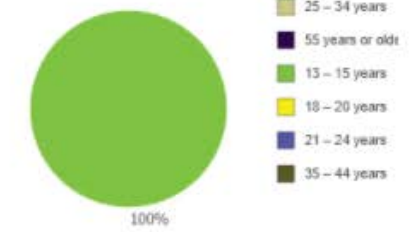
Use information on this tab to assess whether characteristics of treatment and comparison group clients appear similar. Use the Data Export function to produce a data file for statistical testing. The information on this tab cannot be used to determine baseline equivalence because it has not been tested for statistical significance. The bar chart to the right displays applicant characteristics by service assignment within the selected time frame; the graphics also reflect any population selected by the grantee above.

The charts to the right display selected applicant characteristics by service assignment for the selected time frame. The graphics also reflect any population selected by the grantee above.

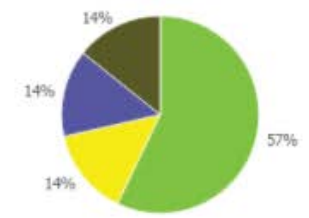
Control (With Services)



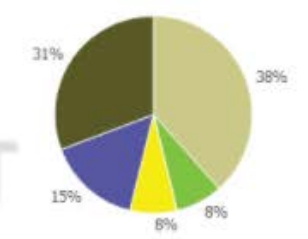
Control Waitlist (With Services)



Enhanced Services Plus Job Club



Treatment Services



Filter by population type

# Applicant Characteristics by Service Assignment



# Updated guidance from OFA

# Updated guidance on recording substantive ISCs

- / OFA has approved grantees to input any substantive ISCs that took place before enrollment for each client**
  - FPS approval is not required before entering this type of ISC
  - Enter the substantive ISC with a post-enrollment date; include a case note that the contact occurred prior to enrollment
- / nFORM will be modified so grantees can select a checkbox to identify if a substantive ISC took place before a client was enrolled, and track these separately in nFORM data tools**

