

## Examine Recruitment and Enrollment with nFORM

Recruitment and enrollment are common challenges faced by Healthy Marriage and Responsible Fatherhood programs. nFORM's data tools can help programs identify their strengths and challenges by providing information on recruitment and enrollment trends and progress to date.

Consider the following common questions and how you can use nFORM's query tool, operational reports, and data export to review and better understand the quarterly performance measures that you report to ACF, and to support your program monitoring and CQI efforts:

**How many clients are enrolling?** You can monitor enrollment rates by reviewing the QPR, PPR, or School Year Performance Report (for school-based READY4Life grantees), then drill down further using the query tool, client status summary operational report, and data export. Data from these reports can help you determine if your program is on track to meet enrollment targets and whether adjustments to recruitment strategies are needed. See [Section 1](#) for more detailed information on how to use each of these data tools to understand progress on enrollment.

**Are there enrollment patterns?** Reviewing enrollment patterns can help grantees refine recruitment strategies and service delivery options and better plan for staffing. Enrollment information by location, month, cohort, or service assignment for grantees conducting local evaluations can be reviewed using the query tool as well as the survey completion summary and local evaluation enrollment operational reports. More information on reviewing enrollment patterns using each of these data tools is available in [Section 3](#) below.

**Who is enrolling?** You can use the query tool and data export to compare the demographic characteristics of enrolled clients with your program's intended population to determine whether you are reaching your intended population or should revisit recruitment strategies. The zip code summary operational report also provides aggregate location information on where clients live, which supports decision-making around recruitment, service delivery, and staffing needs within specific geographic areas. See [Section 2](#) for more details on how to use these data tools to review client demographics.

**How do clients hear about services and why do they enroll?** Use client demographic information along with information about recruitment methods, how clients hear about your program, and why they enroll to determine whether you are recruiting and enrolling your intended population. You can review this type of information in Section C-01 of the PPR, the query tool, and the data export. More information on how to use these data tools to monitor outreach and recruitment trends can be found in [Section 4](#) below.

## How many clients are enrolling?

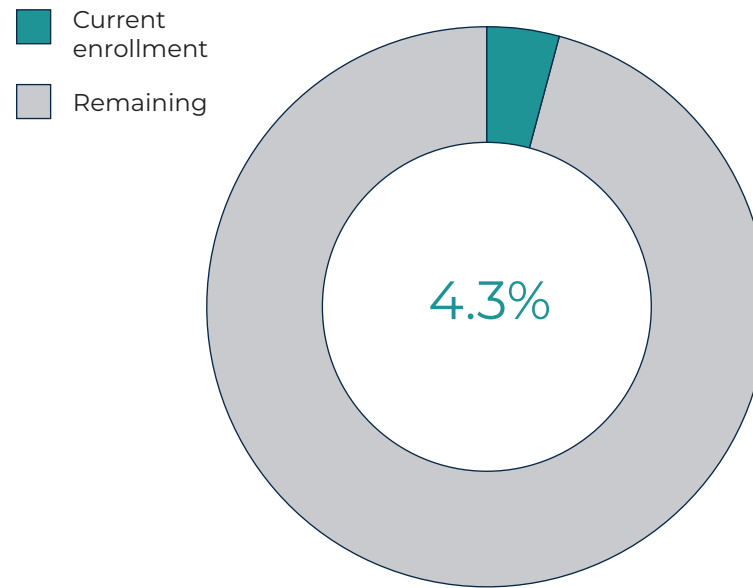
Section B-01 of the QPR and C-03.2 of the PPR display the enrollment target(s) and the number of clients/couples enrolled during the reporting period for each population that your grantee serves. READY4Life school-based programs can review the total number of students enrolled in the current school year (starting on July 1) in Section C-03.2 of the **School Year Performance Report**. These reports can be downloaded at any point during the reporting period to monitor enrollment rates. To drill down further, program staff can review the query tool, operational reports, and data export for more detailed information on recruitment and enrollment.

### 2. Enrollment targets and actual enrollment

|  | Number of adult couples <sup>a</sup> | Number of adult individuals |
|--|--------------------------------------|-----------------------------|
| Enrollment target for the grant year   | 260                                  | 210                         |
| Enrolled since the beginning of grant year through the end of reporting period | 78                                   | 841                         |
| % of grant-year target met to date   | 30%                                  | 400.5%                      |

<sup>a</sup>The number of adult couples is the number of couples units.

### Percent of Target Enrolled for the Current Grant Year



Along with the QPR/PPR, the query tool's **Grant Year Overview** tab shows enrollment to date for the current grant year as a percentage of the grantee's annual enrollment target for each population served. Check this information frequently to see if your program is on track to meeting enrollment targets, whether recruitment is trending in the expected direction since your last QPR/PPR was submitted, or whether new recruitment strategies might be needed.

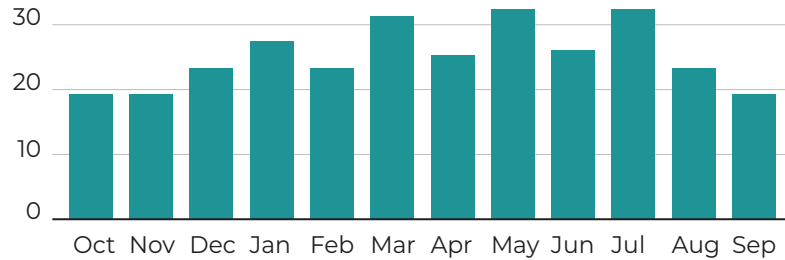
If the number of clients enrolled seems lower than expected, use the **Client Status Report Summary<sup>1</sup>** operational report to identify the number of clients who have a client status of "Applicant pending enrollment" and still need to complete the enrollment process, as well as detailed information on all clients who have completed enrollment in nFORM. Clients enrolled under a couples population must complete the Applicant Characteristics Survey (ACS) and be linked with their partner in nFORM in order for the couple's enrollment to be counted. This same report can be used by grantees serving couples to determine whether any clients enrolled under the couples population type have not been linked in nFORM with their partner and therefore do not have an assigned couple ID.

| Client Grantee Location | Client ID | Couple ID | Client Last Name | Client First Name | Enrollment Date | Client Status                | Client Status Change Date |
|-------------------------|-----------|-----------|------------------|-------------------|-----------------|------------------------------|---------------------------|
| Northside               | 10026896  |           | Smith            | John              | 10/5/2021       | Active                       | 4/1/2022                  |
| Northside               | 10026906  |           | Smith            | Jane              | 10/5/2021       | Active                       | 10/5/2021                 |
| Southside               | 10026919  |           | Albert           | Mark              | 10/5/2021       | Applicant pending enrollment | 1/15/2022                 |

<sup>1</sup> Data included in this resource does not represent real grantee or client information.

## Are there enrollment patterns?

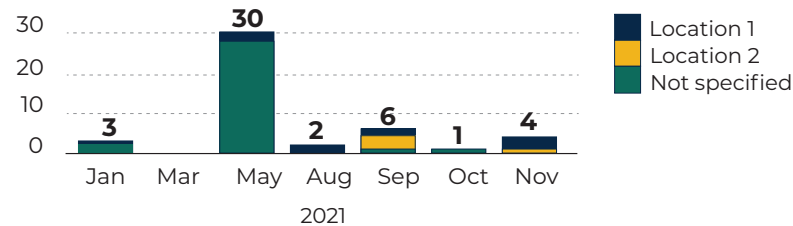
Number of Clients Enrolled by Month



The query tool’s **Grant Year Overview tab** shows the number of clients enrolled to date during each month of the grant year. Hover over each bar to see the exact enrollment count for each month.

The **Enrollment** tab shows the same information, including previous years’ monthly enrollment and enrollment by location, when grantees have entered location options in nFORM’s set-up tab and selected from those options during the enrollment process. Enrollment trends, including monthly enrollment rates, how applicants heard about the program, and their primary reasons for enrolling can be reviewed by filtering on a single location. To filter on a single location, click on that location in the legend to the right of the enrollment graph; all data on the tab will then filter to that location. Use this information to plan staffing and program offerings and to refine recruitment strategies.

Number of Clients Enrolled by Grantee Location, by Month



To drill down further on enrollment by location or specific time frame, the **Survey Completion Summary** operational report includes the number of clients who have completed the Applicant Characteristics Survey and are therefore considered enrolled.<sup>2</sup> This report also includes detailed information on enrollment and survey completion by client.

| Grantee                        | Population            | Number of Clients         |          |                 |          |             |          |
|--------------------------------|-----------------------|---------------------------|----------|-----------------|----------|-------------|----------|
|                                |                       | Applicant Characteristics |          | Entrance Survey |          | Exit Survey |          |
|                                |                       | Completed                 | Refused  | Completed       | Refused  | Completed   | Refused  |
| <b>Cloud Grantee 1 RF (LE)</b> | <b>All</b>            | <b>827</b>                | <b>1</b> | <b>525</b>      | <b>0</b> | <b>207</b>  | <b>0</b> |
|                                | Community couple      | 317                       | 1        | 232             | 0        | 82          | 0        |
|                                | Community individual  | 384                       | 0        | 233             | 0        | 102         | 0        |
|                                | Reentering individual | 126                       | 0        | 60              | 0        | 23          | 0        |

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

| Client Grantee Location | Population            | Client ID | Client Last Name | Client First Name | Current Client Status | Application Date | Enrollment Date | Survey Completion Date           |                 |             |
|-------------------------|-----------------------|-----------|------------------|-------------------|-----------------------|------------------|-----------------|----------------------------------|-----------------|-------------|
|                         |                       |           |                  |                   |                       |                  |                 | Applicant Characteristics Survey | Entrance Survey | Exit Survey |
| Eastside                | Community individual  | 10022858  | Byers            | Joyce             | Active                | 12/1/2021        | 12/1/2021       | 12/1/2021                        | 12/4/2021       | 2/4/2022    |
| Eastside                | Community individual  | 10066827  | Lou              | Mary              | Temporary hold        | 1/24/2022        | 1/22/2022       | Refused                          |                 |             |
| Southside               | Reentering individual | 10025266  | Carter           | Joe               | Active                | 3/17/2022        | 3/19/2022       | 3/19/2022                        |                 |             |

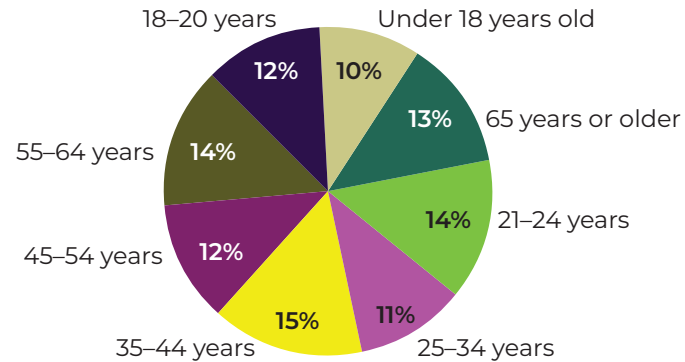
Grantees conducting local evaluations and using service assignments can review enrollment by service assignment using the **Local Evaluation Enrollment** report

| RF Grantee | Grantee Name |           | Control Waitlist (With Services) |  |                   | Treatment         |  |
|------------|--------------|-----------|----------------------------------|--|-------------------|-------------------|--|
|            | Site Name    | Total     | CW group                         |  | Treatment 1 group | Treatment 2 group |  |
|            |              |           |                                  |  |                   |                   |  |
|            | <b>Total</b> | <b>15</b> | <b>7</b>                         |  | <b>4</b>          | <b>4</b>          |  |
|            | Eastside     | 5         | 1                                |  | 2                 | 2                 |  |
|            | Northside    | 3         | 2                                |  | 0                 | 1                 |  |
|            | Southside    | 4         | 2                                |  | 1                 | 1                 |  |
|            | Westside     | 3         | 2                                |  | 1                 | 0                 |  |

<sup>2</sup> Grantees conducting a local evaluation and using the service assignment feature in nFORM 2.0 must record a service assignment after clients complete the Applicant Characteristics Survey to enroll them.

## Who is enrolling?

Demographic information for enrolled clients can be reviewed in Sections C-02.1—C-02.3 of the PPR and School Year Performance Report. You can also review the query tool’s **Applicant Characteristics tab** for a distribution of enrolled clients by age, employment status, race, ethnicity, gender, and partner status. This tab can be used to regularly track these measures between quarterly reports. Compare the characteristics of enrolled clients with the program’s intended target population to determine whether you are reaching your target population or should revisit recruitment strategies. For a more detailed or cross-tab analysis of client characteristics, you can use the **Survey Response Data tab** of the **Data Export** which includes responses reported on the ACS at the client level.



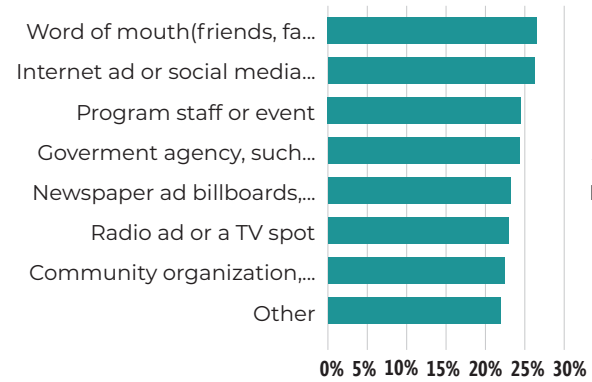
You can also review the total number of clients living within each zip code in the **Zip Code Summary Report**. You can use this information to determine whether clients are being served in the expected locations, assess staffing and service delivery needs across locations, or target recruitment activities to specific geographic locations that are currently underserved.

| Client Grantee Location | Population           | Zip Code | # Clients |
|-------------------------|----------------------|----------|-----------|
| Northside               | Community individual | 7777     | 1         |
| Eastside                | Community couple     | 10001    | 5         |
| Eastside                | Community couple     | 10002    | 2         |

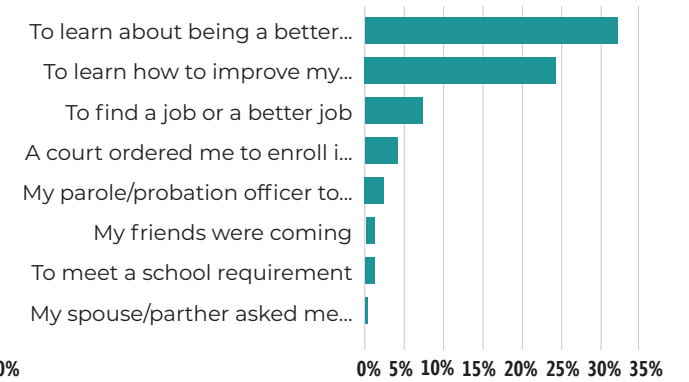
## How do clients hear about services and why do they enroll?

Section C-01 of the PPR provides information on which recruitment methods grantees used during the reporting period, along with the types of agencies and organizations that provided referrals, recruitment staffing, and a breakdown of how clients heard about the program and their primary reasons for enrolling. As described earlier in this tip sheet, information on recruitment can also be found on the query tool’s **Enrollment tab**, which shows how applicants heard about the program and their primary reason for enrolling. Select different locations or calendar years and months on the query tool to see whether responses change by service area or over time. Use this information, along with what you learn on the **Applicant Characteristics tab**, to plan recruitment activities that better reach your target population.

**How Applicants Heard About the Program**



**Primary Reasons for Enrolling**



The Program Operations tab of the data export provides more detailed grantee-level data on recruitment measures. Client-level information about referral source can also be found on two tabs of the data export:

- Client Info tab** includes the referring organization name and type as entered by staff into nFORM
- Survey Response Data tab** reports the method by which the client reported hearing about the grantee on the ACS

Contact the nFORM 2.0 help desk with any questions at [nform2helpdesk@mathematica-mpr.com](mailto:nform2helpdesk@mathematica-mpr.com). We are happy to help!