nFORM 2.0 and Performance Reporting for READY4Life Grantees

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August 25, 2021

OFFICE OF FAMILY ASSISTANCE
An Office of the Administration for Children & Families

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HMRF
HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

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Progress Together

BUILD
Building Usage, Improvement, & Learning with Data in HMRF Programs

Today's agenda

- Refresher on best practices for collecting data with nFORM 2.0 in schools
- How to report performance on the grant year and scholastic calendars
- Where to find more information on data collection and reporting
- Your questions

Best practices for collecting data in schools with nFORM

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General process for collecting data in schools with nFORM

Before services begin
- Engage schools
- Handle logistics
- Create and practice data collection plan

→

Before the first class
- Create students' nFORM records
- Set up applicant characteristics survey

→

During the first class
- Administer applicant characteristics survey
- Set up and administer entrance survey

→

During the program
- Record service delivery data in nFORM
- Monitor data collection using nFORM

→

Before the last class
- Set up exit survey

→

During the last class
- Administer exit survey

Use the data collection plan template on nFORM's help page to create a data collection plan that walks through all the specific details for your program's data collection process!

Engage schools before services begin

- **Discuss data collection weeks before the program starts**
- **Engage schools at all levels, if possible**
  - Ideally, identify a single point of contact at each school to work with on planning, practicing, and conducting data collection at the school
- **Tailor your outreach to the school**
  - Consider sending letters in advance to explain the purpose of the data collection and the basic process
  - Explain confidentiality, the protection of personally identifiable information (PII), and Institutional Review Board (IRB) approval (if applicable)
  - Highlight nFORM's security features

Logistics in schools

- Determine whether to use grantee or school computers or tablets
- Arrange for separate computers for program staff to access nFORM to generate survey passcodes
- Provide earbuds for students to listen to survey questions
- Obtain wipes approved for cleaning all devices and earbuds after each client use
- Bookmark the survey URL on devices students will use

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Ensure sufficient Internet access

- **Test connecting to nFORM in the classroom before collecting data (if possible)**
  - Make sure there is enough bandwidth to support group administration of the surveys
- **Check whether the Internet speed strong enough to support your data collection**
  - Google to find a simple speed test
  - Obtain Jetpacks or mobile hotspots if the Internet is not available, or the connection is not strong enough
- **Ensure there are security protections in place to prevent unauthorized access to nFORM**

Determine whether you need to administer surveys on paper

- **Speak to your Family Assistance Program Specialist (FPS) to obtain approval for using paper surveys in specific (rare) situations, such as schools without sufficient Internet access**
- **Document plans for printing and administering the paper surveys and entering the responses**
  - Consider how often you will need to administer paper surveys and in which languages
- **Decide how you will securely transport, administer, store, and ultimately destroy the paper surveys to protect client confidentiality**
- **Have a plan for helping clients navigate the skip patterns in paper surveys**

Create students' client records in nFORM before data collection begins

- **Tell the school what information you will need ahead of time**
  - Names
  - Dates of birth
  - Consider using the school's contact information
- **Discuss confidentiality procedures and IRB approval (if applicable)**
- **Determine whether you will need a memorandum of understanding**
- **Identify eligible students**
  - No one under age 13
  - Client records cannot be deleted
- **Once you have the information, complete an application form for each eligible student to create nFORM client record and client ID**

Survey data collection is designed to be easy for staff and clients

/ Self-administered web surveys

- Surveys are accessed by the same URL and only become available in their intended order and timing
- Can be completed on computer, laptop, or tablet
- Automatic skip patterns so that surveys are tailored to youth clients
- Clients can skip any questions they do not want to answer

/ Audio computer-assisted self-interview (ACASI) technology

- Client has the option to listen to questions instead of reading them, thus reducing literacy concerns
- Available in English and Spanish

General survey process

Survey administration in groups

- **Generate survey passcodes in bulk for administering surveys to clients in groups**
- **Survey passcodes to expire after 96 hours**
- **Record when clients refuse survey and the reason why**
- **If approved, record data from paper surveys**
  - Data from paper surveys should be entered within four days of completion
  - Back-date the surveys up to four calendar days to have the correct enrollment dates for clients who complete paper surveys

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Set up devices in advance

- Test that each device is connected to the Internet
- Open the bookmarked survey URL on each device
- Plug earbuds into each device
- Clean all equipment with disinfecting wipes before and after each survey
- Make sure to charge devices in between uses

Three ACF-approved ways to administer surveys during the public health emergency

- **Option 1: Call clients to administer surveys over the phone and enter their responses into nFORM**
  - Make sure clients are not driving or otherwise distracted
  - Ensure clients are somewhere private
- **Option 2: Video call clients to ask the survey questions and enter their responses into nFORM**
- **Option 3: Email clients the links to the surveys**
  - Follow the practices outlined in the tip sheet
  - Surveys are not optimized for completion on smartphones

Check out the tip sheet on the help page!

Develop scripts for staff to follow when administering surveys

- **Introduce the surveys and explain their purpose and importance**
- **Ask clients whether they have any questions about the surveys**
- **Demonstrate how to use the laptops or tablets**
- **Thank clients in advance for helping**
- **Don't refer to the surveys as "tests" or "exams"**

Tailor the scripts to your program and your clients!

Track participation in services in nFORM

/ Track targets for:

- Primary workshop hours
- Initial attendees (at least one workshop session)
- Halfway attendees (50% of primary workshop hours)
- Completed clients (90% of primary workshop hours)
- Fully finished clients (100% or more of primary workshop hours)

Workshops

- Use nFORM's registration feature to register clients in advance (if applicable)
- Generate the attendance roster from nFORM before each class, and use it to record attendance
- Enter the session attendance in nFORM immediately after each class, and then securely shred the paper roster

New workshop features for nFORM 2.0!

- Name individual sessions
- Enter session start and end times and automatic checks for session duration
- More easily reschedule sessions on the same day they were scheduled
- Message to show how many sessions are pending attendance
- Filter the list of clients on the registration and attendance screens

Individual services (case management)

- **Record individual service contacts in nFORM at the time of each contact**
- **Record each referral in nFORM at the time it is made**
  - Check in with clients to remind and encourage them to contact the service providers they have been referred to
  - Use nFORM to record whether clients follow up on referrals
- **Record incentives and program supports in nFORM whenever they are offered to clients**

Use nFORM to monitor data collection

- **Survey Completion Operational Report**
  - Confirm that all students have completed enrollment
    - REMINDER: Client needs to hit “submit” on the last page for the survey to be logged as completed
    - Service delivery information and workshop attendance cannot be recorded before the enrollment date
  - Identify students who need to make up surveys
- **Series Session Attendance Operational Report**
  - Ensure that attendance is recorded for each session
- **Primary Workshop Hours Operational Report**
  - Make sure clients progress toward the target hours of programming
- **Additional analysis options: Query tool and data export**

Train your staff on the data collection plan

- **The training approach should consider the size and experience of your team**
  - Consider modes that will work best for your staff
    - Virtual, in person, videos
- **Talk through the plan as a group**
  - Answer staff questions
  - Discuss logistical concerns
  - Incorporate staff feedback as needed
- **Repeat this process regularly to ensure it meets current needs, and staff remain familiar with it**

Practice your written data collection plan before services begin

- **Leave time for the survey in the class schedule**
  - Schedule enough staff to set up computers/tables for all students before the start of the class
  - Offer make-up surveys to students who are absent
  - Additional visits to the school should be approved by the school officials
- **The nFORM Help Desk is happy to answer your questions on data collection in schools**

Client privacy

- **Client privacy is paramount, so it is important to follow procedures to safeguard client information**
  - Data Collection and Logistics Manual
  - Module I of the nFORM User Manual
  - Training video on keeping data secure
  - Follow your IRB procedures, if applicable
- **REMINDER: Never text or email clients' PII, like their names, including to the help desk**

Questions?

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How to report performance on the grant year and scholastic calendars

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Performance reporting for HMRF grants

- **Grantees submit quarterly reports**
  - PPR = semiannual performance progress report (Months 6 and 12)
  - QPR = quarterly progress report (Months 3 and 9)
- **All performance measures data are collected and stored in nFORM**
- **Grantees generate all numeric information for reports at the touch of a button in nFORM**

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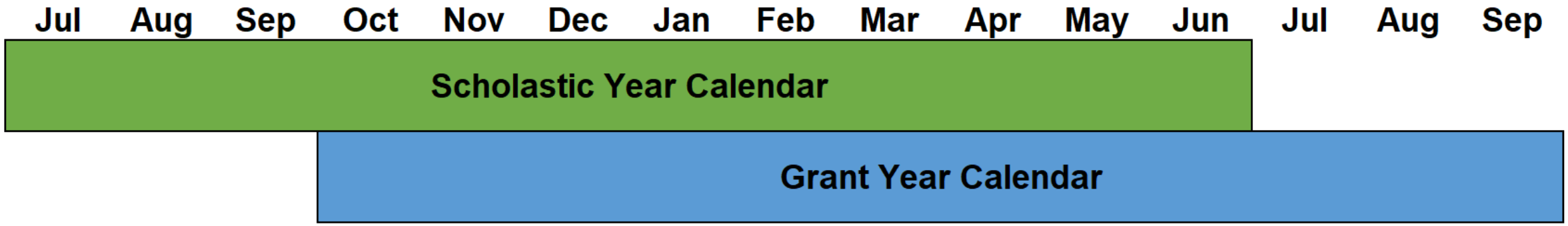
Reporting changes for 2020 grantee cohort

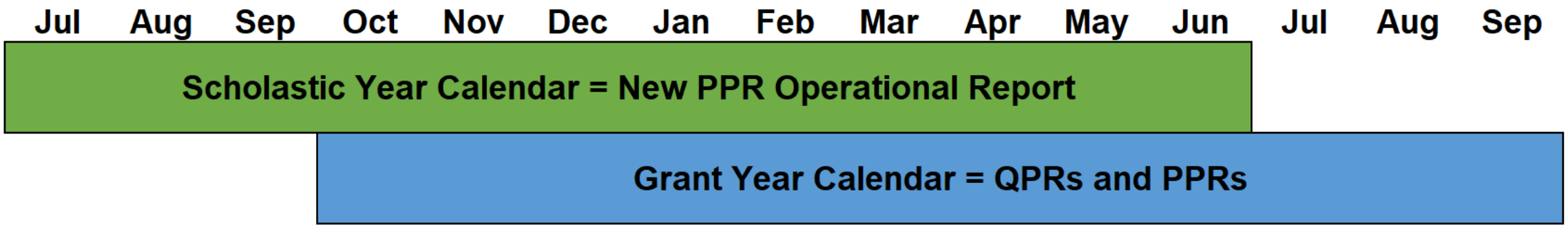
- **The QPRs and PPRs no longer include a “two-month” lag for reporting participation**
- **The tables reporting participation in primary workshops will include all clients who participated in primary workshops during the grant year, regardless of when they enrolled**
- **READY4Life grantees will be given an operational report in December that calculates performance based on the school year calendar**

HMRF grant year and scholastic year do not align



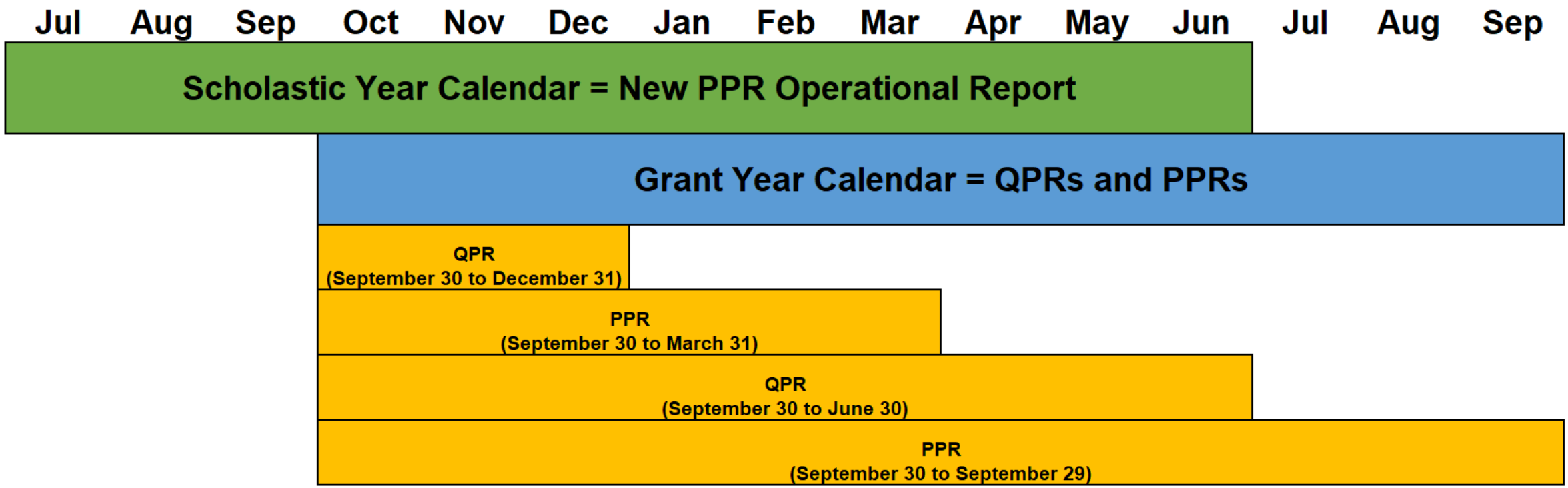
- **Most school-based programs enroll their clients at the start of the scholastic year**
  - This enrollment period corresponds to the last quarter of the grant year
- **School-based programs then provide most of their services in the next grant year**

New operational report in December for reporting performance on the scholastic year calendar



- **A new operational report will be available for READY4Life grantees to calculate the PPR numeric information on the scholastic year calendar**
  - For example, showing enrollment for July 1 through June 30
- **READY4Life grantees will still submit the QPRs and PPRs for the grant year, but they can generate the new operational report to report performance for the scholastic year as well**
  - Starting in Grant Year 2, the QPRs and PPRs will also report participation in primary workshops for clients regardless of when they enrolled

Operational report produces full PPR because scholastic year and grant year do not align



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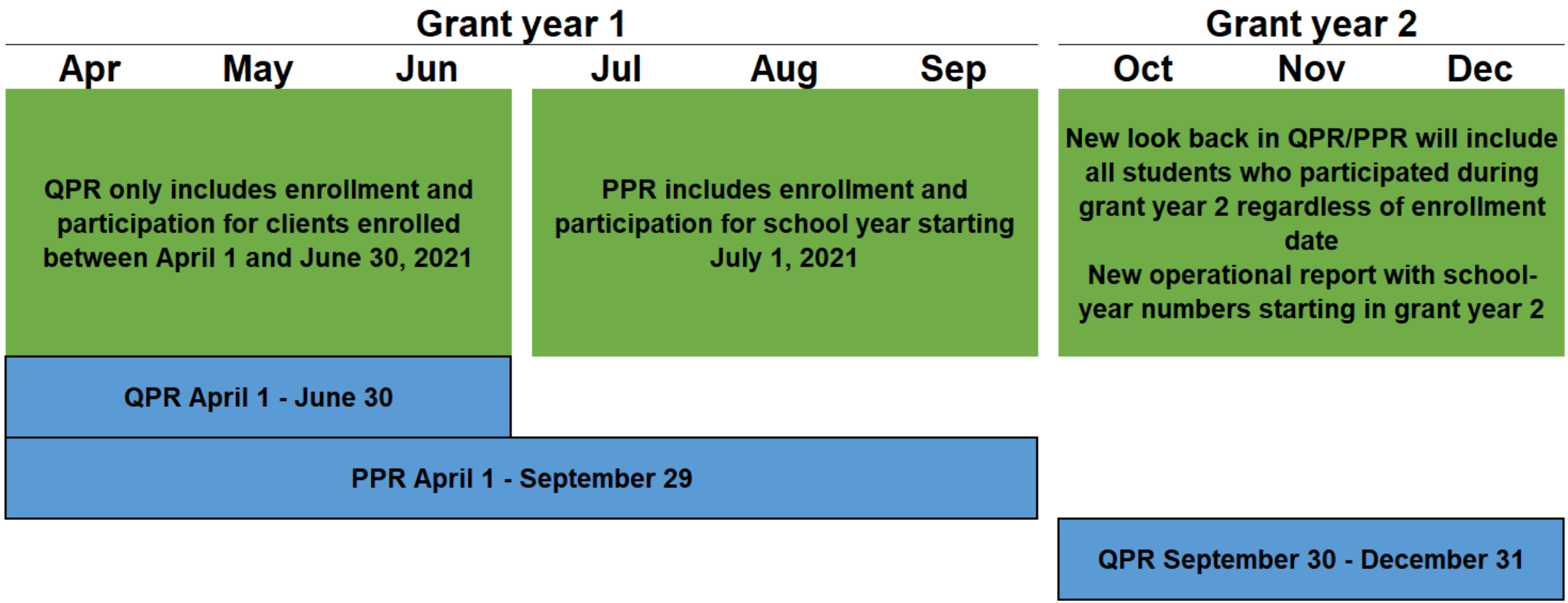
What does reporting look like for READY4Life grantees during 2021?



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What does this mean for reporting performance as a program serving youth in schools?

- **Participation in primary workshops will be reported regardless of when the client enrolled**
- **Enrollment, survey information, and participation in other services will be for clients enrolled in the grant year of the report**
  - For example, if you enroll students in August or September 2021, none of those students will appear under enrollment and services in Year 2
- **Use the new operational report to see the performance for the school year and describe the performance in your narrative**

Example enrollment tables for Grant Year 1 PPR and Grant Year 2 QPR

Grant Year 1 PPR: 4/1/2021 to 9/29/2021

1. Enrollment targets and actual enrollment	Number of youth
Enrollment target for the grant year	100
Enrolled since the beginning of grant year through the end of reporting period	95
% of grant-year target met to date	95%

Grant Year 2 QPR: 9/30/2021 to 12/31/2021

1. Enrollment targets and actual enrollment	Number of youth
Enrollment target for the grant year	100
Enrolled since the beginning of grant year through the end of reporting period	0
% of grant-year target met to date	0%

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Reporting performance for READY4Life programs

- **READY4Life grantees must submit the QPRs and PPRs that report performance on the grant year**
- **The new operational report is not required, but can be shared with your FPS and included as part of the PDF you submit to Office of Grants Management (OGM) each quarter**
  - Use the new report for Continuous Quality Improvement (CQI) and program monitoring, too!

Use nFORM's data tools and reports to provide context in your quarterly progress narrative

Query Tool

A data visualization tool

Drill down by options such as date and client population

Operational Reports

Reports showing summary and client-level data

Open in Excel to sort and filter the information

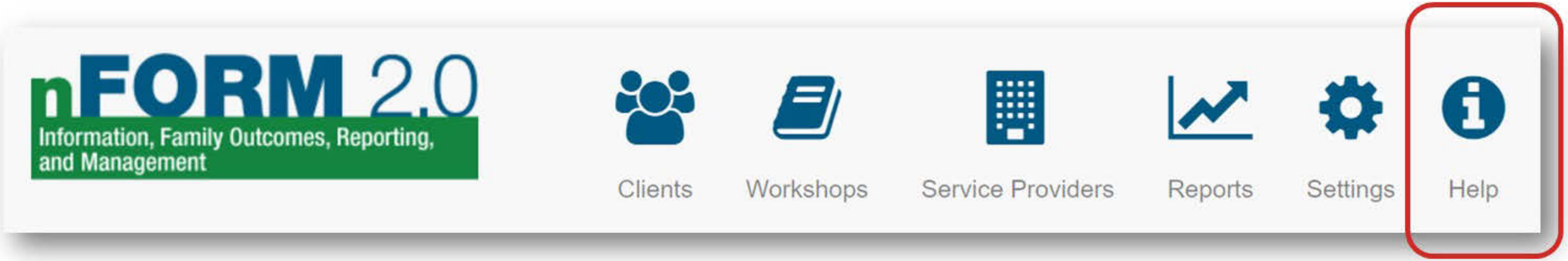
Data Export

Export all data except personally identifiable information

Open in Excel or statistical program to do custom analyses

Where to find more information

nFORM help page



- **nFORM's help page has many resources to help you**
  - Tip sheets and manuals
  - Training videos, including on bulk survey passcodes and survey administration
  - PDFs of surveys in English and Spanish
- **nFORM's help page is available without logging in**

nFORM's help desk

- **Submit your questions to nFORM's help desk**
  - Ticketing system integrated into nFORM
  - Responses by email or phone call for complex questions
  - Replies sent during business hours
- **Monthly office hours the second Tuesday of each month from 2 to 3 p.m. ET**

Questions?

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