

# Using an equity-centered approach to program monitoring with nFORM 2.0 (Part 2)

February 13<sup>th</sup>, 2024  
nFORM 2.0 Team  
Mathematica

**OFFICE OF FAMILY ASSISTANCE**

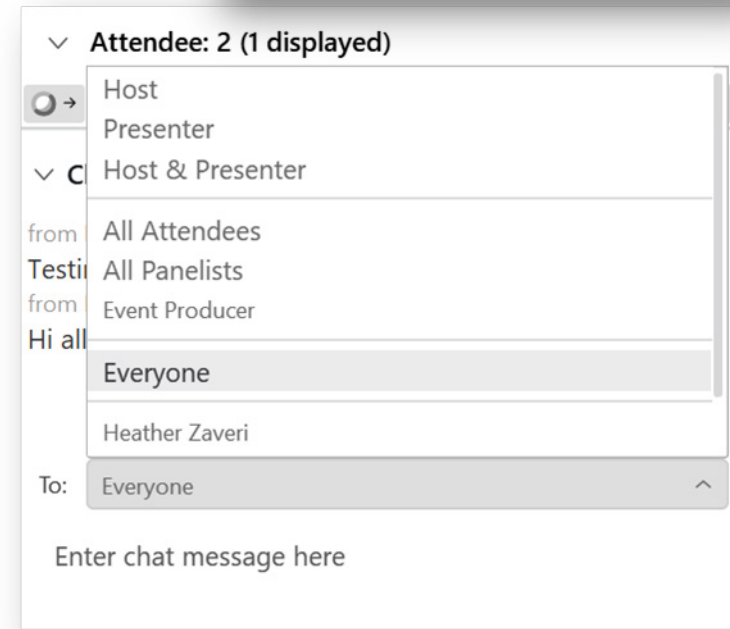
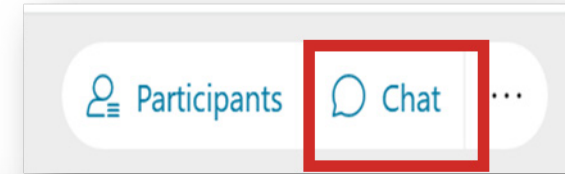
An Office of the Administration for Children & Families





# Housekeeping

- / Use the chat to ask 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 resources site
2. Review the Performance Measures and Data Collection Logistics Manual on the resources site for more information on keeping data secure



# Today's topics

## / **Recent query tool enhancements**

- Grant Year Overview tab
- Workshop Participation: Primary Workshops tab

## / **nFORM tools for monitoring equity in service delivery**

## / **Deep dive: Using nFORM to analyze trends in workshop participation**

## / **Announcements**



# Recent query tool enhancements



# Grant Year Overview tab enhancements available now

- / No changes to the enrollment panel**
- / Client participation panel now includes data on substantive service contacts, optional workshop participation, and progress towards current grant year primary workshop targets**
- / In data quality panel, labels and legends for entrance and exit survey status, referral follow ups, and sessions pending attendance have been updated**



# Grant Year Overview tab enhancements

Grant Year Overview | Enrollment | Applicant Characteristics | Individual Services | Workshop Participation - All Workshops | Workshop Participation - Primary Workshops | Client Outcomes

**Cloud Grantee 1 RF (LE)**

**2024 GRANT YEAR** This dashboard highlights key indicators for the current grant year for each client population served by the grant. Grant years run from September 30 through September 29 of the following calendar year. Grant recipients that serve multiple populations should view data for one population at a time using the population buttons to the right. For grant recipients conducting local evaluations, data displayed on this tab are for treatment and control (with services) group clients only. To explore additional aspects of program and client performance, click on the Enrollment, Applicant Characteristics, Individual Services, Workshop Participation, or Client Outcomes tabs.

Community individual | Community couple | Reentering individual

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**ENROLLMENT**

Percent of Target Enrolled for the Current Grant Year

- Current enrollment: 32.7%
- Remaining: 67.3%

Number of Clients Enrolled by Month

Month	Number of Clients Enrolled
Oct	42
Nov	5

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**CLIENT PARTICIPATION**

- 0.4: Average substantive individual service contacts received by clients enrolled in current grant year
- 2.2: Optional workshops: Average hours of participation for clients who enrolled and attended optional workshops in current grant year
- 8.1: Primary workshops: Average hours of participation for clients who enrolled and attended primary workshops in current grant year

Percent of Primary Workshop Participation Target Reached in Current Grant Year

Category	Percent Reached	Total clients achieving benchmark	Target count of clients for benchmark
Initial attendees	37.8%	51	135
Halfway attendees	22.7%	25	110
Completed clients	0%	0	100
Fully finished clients	0%	0	90

Show Table

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**DATA QUALITY**

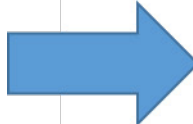
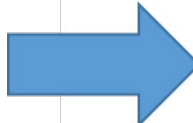
Entrance survey status for clients enrolled in current grant year

- Completed (26): 43%
- Refused (2): 4%
- Incomplete or Not Started (21): 53%

Exit survey status for clients enrolled in current grant year who have completed or refused entrance survey

- Completed (0): 0%
- Refused (1): 1%
- Incomplete or Not Started (27): 96%

- 1: Number of referrals needing follow-up for current year enrollees
- 465: Number of sessions from all grant years still pending attendance





# Client participation panel: Updated tiles

Before

**0 %**

Clients participated in at least one service contact

**0 %**

Clients participated in at least one workshop session

**-**

Average hours of participation in primary workshops

After

**6.8**

Average substantive individual service contacts received by clients enrolled in current grant year

**4.3**

Optional workshops:  
Average hours of participation for clients who enrolled and attended optional workshops in current grant year

**16.5**

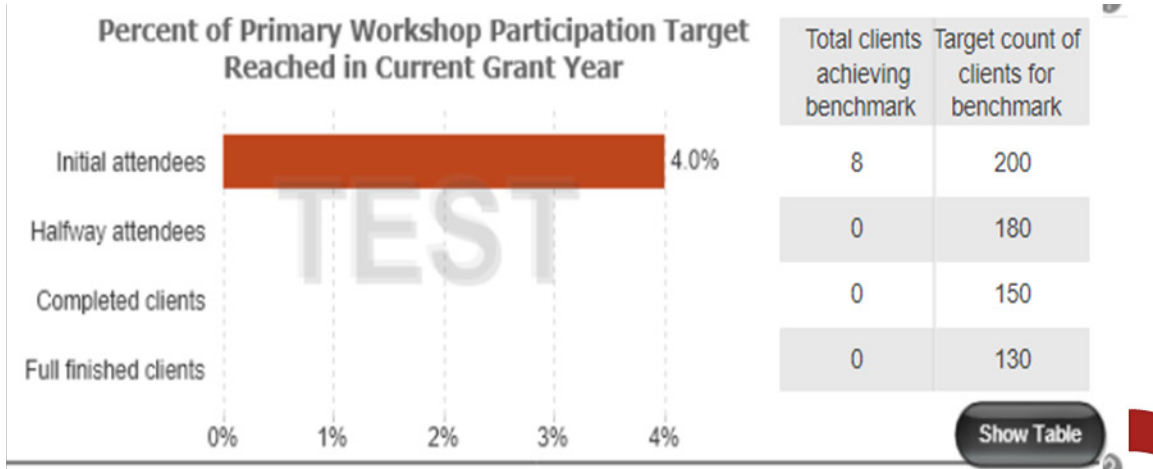
Primary workshops:  
Average hours of participation for clients who enrolled and attended primary workshops in current grant year



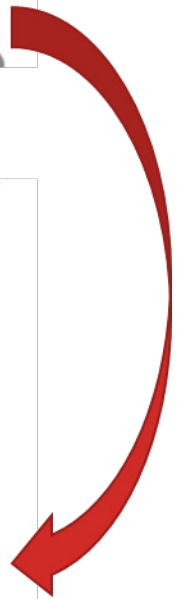


# Client participation panel: New bar chart/table

- / Show real time progress toward current grant year participation targets
  - Align with PPR Section C-04.2b Table 2
- / Grantees serving multiple populations must select one at a time
- / New toggle button switches between bar graph and table displays

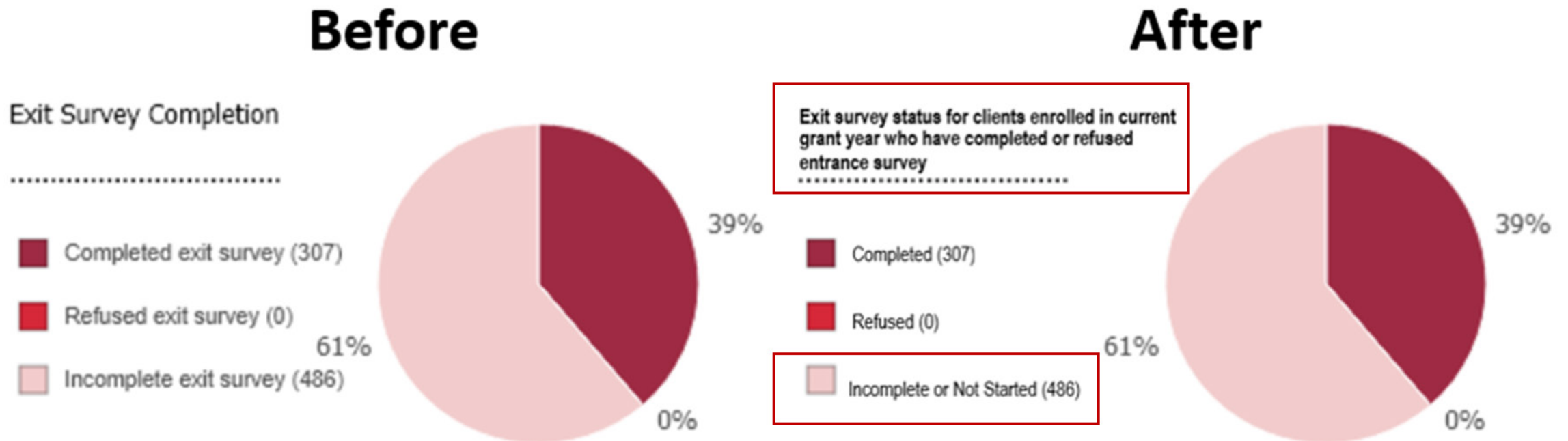


Benchmarks for participation in primary workshops	Total clients achieving benchmark in current grant year	Target count of clients for benchmark	Percent of target met
Initial attendees	8	200	4.0%
Halfway attendees	0	180	0.0%
Completed clients	0	150	0.0%
Fully finished clients	0	130	0.0%





# Data quality panel: Exit survey status



Exit survey status includes clients who may or may not have had the opportunity to start an exit survey



# Data quality panel: Referral follow ups and sessions pending attendance

Before

0

Number of Referrals needing follow-up

After

0

Number of referrals needing follow-up for current year enrollees

Before

681

Number of Sessions pending attendance

After

681

Number of sessions from all grant years still pending attendance



# Primary Workshops tab

Grant Year Overview | Enrollment | Applicant Characteristics | Individual Services | Workshop Participation - All Workshops | **Workshop Participation - Primary Workshops** | Client Outcomes

READY4Life Grantee 1

Enrollment Start Date: 03/01/2023  
Enrollment End Date: 11/30/2023

**Current Selections**  
Grantee Name: READY4Life Grantee 1  
Population: Youth  
Enrollment Start: 3/1/2023  
Enrollment End: 11/30/2023

Analyze primary workshop participation by client population, enrollment date range, workshop, and session series. Select any date range from April 1, 2021 through yesterday's date to filter the data to clients who were enrolled during the selected timeframe and assigned to populations for which the grant has participation targets. Grant recipients that serve multiple populations should view data for one population at a time using the population buttons to the right. For couples populations, enrollment and participation are counted for the couple rather than individual partners. Note that data for this tab are only available for clients who were assigned to populations for which the grantee has enrollment targets.

Youth

### PROGRESS TOWARDS TARGET PARTICIPATION IN PRIMARY WORKSHOPS

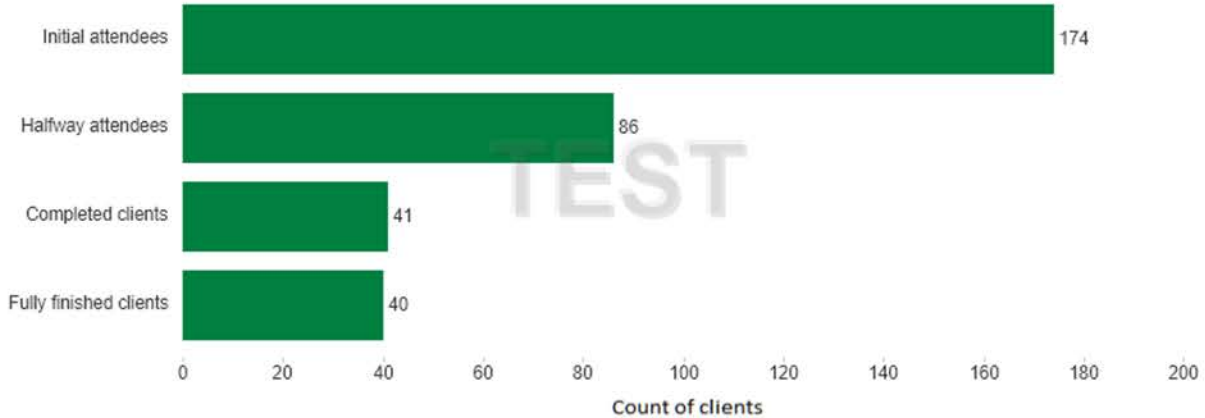


Revised text clarifying couples calculations

Clear Selections

Workshop Series

### COUNT OF CLIENTS REACHING BENCHMARK



**350**  
Clients did not participate in any primary workshop sessions

Updated order of benchmarks to align with PPR Table 2

The bar chart displays the count of clients who reached each of the listed participation targets. Initial attendees are clients who attended at least one primary workshop session. Halfway attendees are clients who completed 50 percent of the planned primary workshop hours. Completed clients are those who completed 90 percent of the planned primary workshop hours. Fully finished clients are those who completed 100 percent or more of the planned primary workshop hours.



# nFORM tools for monitoring equity in service delivery



# New equity-related activities question on the QPR and PPR progress narrative templates

- / ACF added a new question to the progress narrative that asks grantees to describe activities during the reporting period that address or advance equity**
- / FEDTalk on Advancing Equity in HMRF Programs distributed on February 6**
- / Updated QPR/PPR narrative templates available in nFORM and the HMRF Grant Resources site**
- / Programs can use nFORM data to understand and explain potential disparities and strategies for advancing equity**



# How can we use nFORM to monitor potential disparities and strategies for advancing equity?

- / **The January nFORM office hours focused on monitoring potential disparities in outreach and enrollment**
- / **Today's tutorial will focus on how to monitor**
  - Individual service delivery
  - Workshop participation



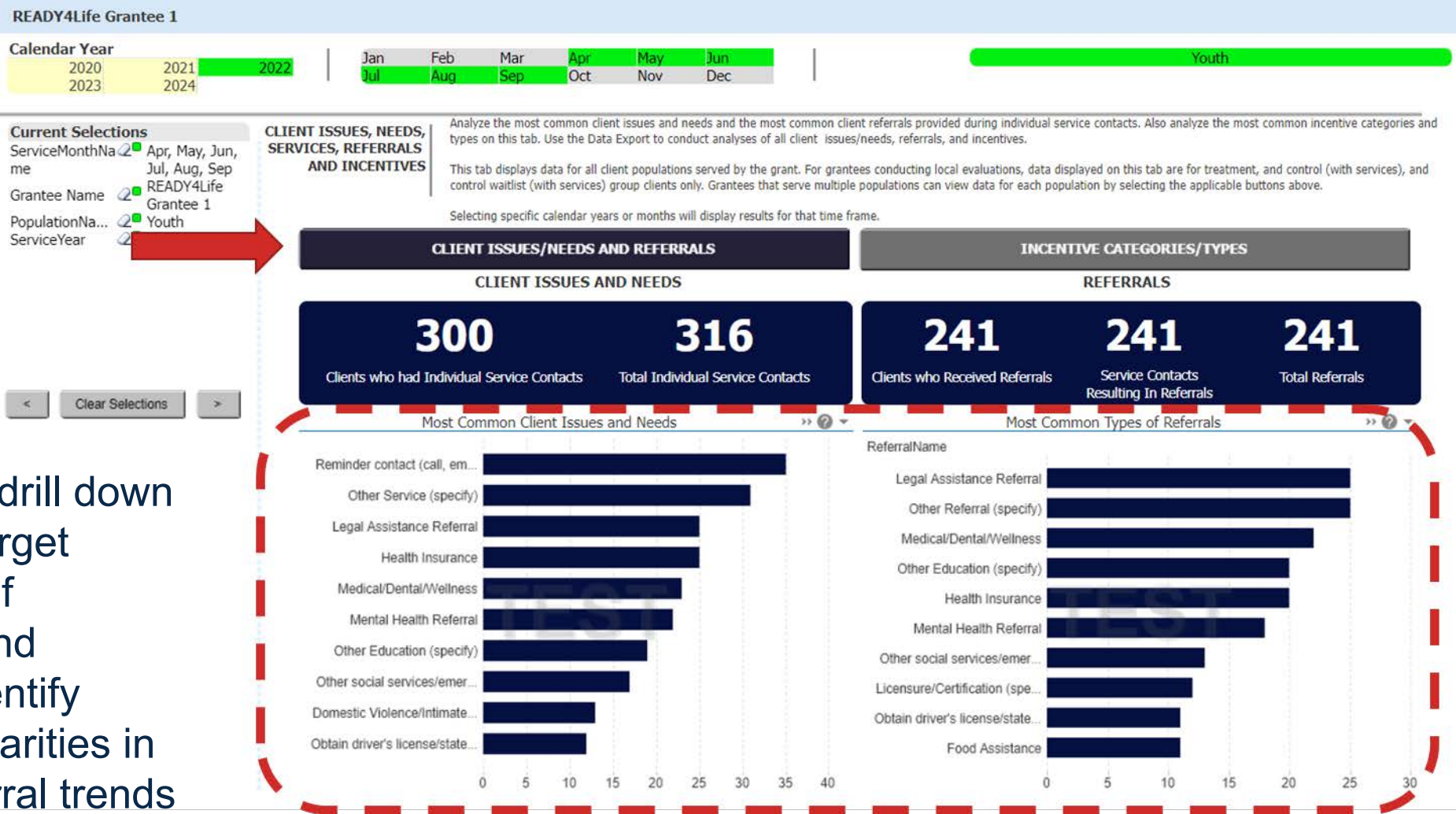
# Data tools to monitor disparities in service delivery

<b>Data Tools</b>	<b>Individual Services</b>	<b>Workshop Participation</b>
<b>PPR</b>	Section C-04.3	Sections C-04.1 and C-04.2
<b>Query Tool</b>	Individual Services tab	Workshop Participation tabs
<b>Operational Reports</b>	Individual Service Contacts Summary and Detail reports	Primary Workshop Participation Detail and Summary report
<b>Data Export</b>	Service Contacts tab	Session Attendance tab





# Review all ISCs provided using the service contacts tab of the query tool



Use filters to drill down on specific target populations (if applicable) and cohorts to identify potential disparities in ISC and referral trends



# Use filters to drill down on incentive provision by population and cohort

**READY4Life Grantee 1**

Calendar Year: 2020, 2021, **2022**, 2023, 2024

Jan, Feb, Mar, **Apr**, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec

**Youth**

**Current Selections**  
ServiceMonthNa: Apr, May, Jun, me, Jul, Aug, Sep  
Grantee Name: READY4Life Grantee 1  
PopulationNa...: Youth  
ServiceYear: 2022

**CLIENT ISSUES, NEEDS, SERVICES, REFERRALS AND INCENTIVES**

Analyze the most common client issues and needs and the most common client referrals provided during individual service contacts. Also analyze the most common incentive categories and types on this tab. Use the Data Export to conduct analyses of all client issues/needs, referrals, and incentives.

This tab displays data for all client populations served by the grant. For grantees conducting local evaluations, data displayed on this tab are for treatment, and control (with services), and control waitlist (with services) group clients only. Grantees that serve multiple populations can view data for each population by selecting the applicable buttons above.

Selecting specific calendar years or months will display results for that time frame.

**CLIENT ISSUES/NEEDS AND REFERRALS** | **INCENTIVE CATEGORIES/TYPES** ←

**INCENTIVE TYPES AND REASONS**

<b>189</b> Clients Received Incentives	<b>198</b> Incentives Received	<b>\$29</b> Average Incentives	<b>\$25 - \$600</b> Incentives Range
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**Categories of Incentives** | **Types of Incentives**

Category/Type	Count
Incentives: Survey Completion	~115
Incentives: Enrollment	~65
Incentives: Participation/Cli...	~15
Gift card	~195
Direct payment to a vendor	~10



# Individual Service Contacts report

Grantee	Client Grantee Location	Population	Number of Clients/Couples	Average Number of Substantive Service Contacts@	Average Number of Reminder Only Service Contacts
Fathers Connect	All	All	200	4.5	8
		Community individuals	140	5	9
		Community couples	60	4	7
	Hogwarts	All	80	4.5	8
		Community individuals	50	5	9
		Community couples	30	4	7
	Under the Sea	All	120	4.5	8
		Community individuals	90	5	9
		Community couples	30	4	7

Client Grantee Location	Population	Client ID	Couple ID (if applicable)	Client Last Name	Client First Name	Current Client Status	Enrollment Date	Client's Case Manager(s)	Most Recent Substantive Service Contact Date	Total Number of Substantive Service Contacts @	Total Number of Reminder Only Service Contacts
Hogwarts	Community individual	10003025		Armweak	Colin	Active	8/16/2022	Storm, Rain			3
Hogwarts	Community couple	10027895	1212	Banana	Anna	Active	10/8/2022	Shine, Sun	10/10/2022	1	2
Hogwarts	Community couple	10027798	1212	Bobbington	Billy	Active	10/8/2022	Shine, Sun	10/10/2022	1	2

← Compare ISCs by location and population to identify disparities



# Incentives Summary report

Cloud Grantee 3 READY4Life (LE)

Incentives Summary Report

Clients Enrolled 9/30/2022 - 9/29/2023

View distribution of incentives by population and location, including types of incentives received

Grantee	Client Grantee Location	Population	Number of clients who received any incentive	Number of clients with incentives exceeding \$350 max	Number of clients who received an Enrollment incentive	Number of clients who received a Participation/ Client Milestone incentive	Number of clients who received a Survey Completion incentive
Cloud Grantee 3 READY4Life (LE)	All	All	410	17	147	81	248
		Youth	410	17	147	81	248
	Asgard	All	312	12	106	60	209
		Youth	312	12	106	60	209
	Camelot	All	9	1	4	2	4
		Youth	9	1	4	2	4
	Hogwarts	All	15	0	4	4	7
		Youth	15	0	4	4	7
	Hollywood	All	15	1	3	1	11
		Youth	15	1	3	1	11
	Immortalia	All	8	0	2	2	4
		Youth	8	0	2	2	4





# Incentives Detail report



Cloud Grantee 3 READY4Life (LE)

Incentives Detail Report

Clients Enrolled 9/30/2022 - 9/29/2023

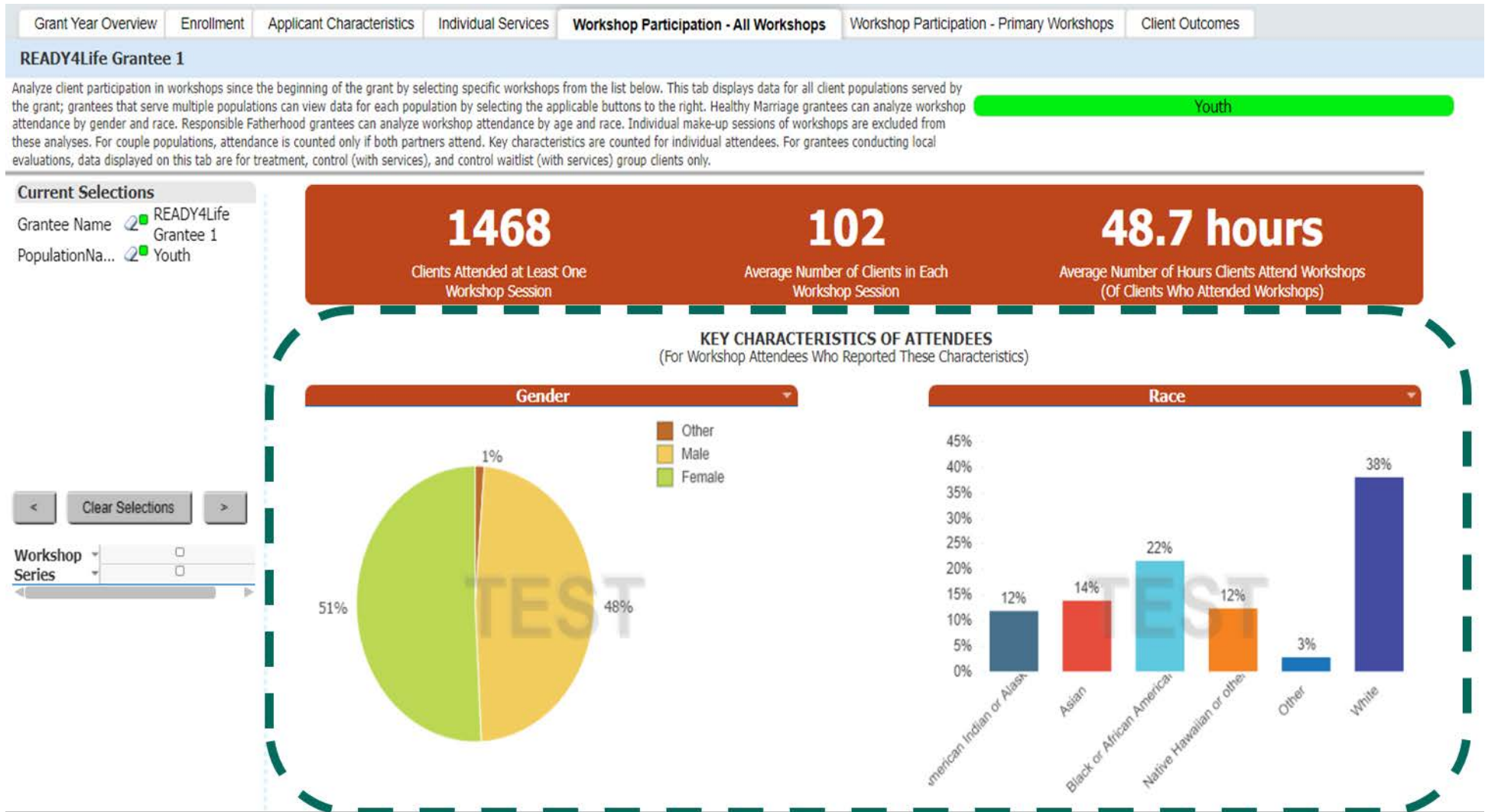


Client Grantee Location	Population	Client ID	Couple ID	Client Last Name	Client First Name	Current Client Status	Service Assignment Name	Enrollment Date	Total Incentives	Enrollment	Participation/Client Milestone	Survey Completion
Camelot	Youth	10113563		Arnold20	Desi20	Active	Control Waitlist (With Services)	2/10/2023	\$25.00	\$25.00	\$0.00	\$0.00
Camelot	Youth	10113741		Arnold29	Desi29	Active	Control Waitlist (With Services)	2/10/2023	\$25.00	\$0.00	\$0.00	\$25.00
Camelot	Youth	10113204		Arnold3	Desi3	Active	Treatment Group	2/10/2023	\$25.00	\$25.00	\$0.00	\$0.00
Asgard	Youth	10113259		Arnold6	Desi6	Active	Treatment Group	2/10/2023	\$25.00	\$0.00	\$0.00	\$25.00
Asgard	Youth	10121623		Bell17	Clara17	Active	Control (With Services)	4/4/2023	\$0.00	\$0.00	\$0.00	\$0.00
Hollywood	Youth	10099894		Bickel1	Travis1	Active		10/26/2022	\$100.00	\$0.00	\$75.00	\$25.00
Asgard	Youth	10100042		Bickel10	Travis10	Active	Control - NO Services	10/26/2022	\$0.00	\$0.00	\$0.00	\$0.00
Hogwarts	Youth	10100055		Bickel11	Travis11	Active	Treatment Group	10/26/2022	\$35.00	\$0.00	\$0.00	\$35.00
Camelot	Youth	10099991		Bickel12	Travis12	Active	Treatment Group	10/26/2022	\$0.00	\$0.00	\$0.00	\$0.00

View incentive distribution at the client-level to review possible disparities by cohort or location



# Workshop Participation – All Workshops

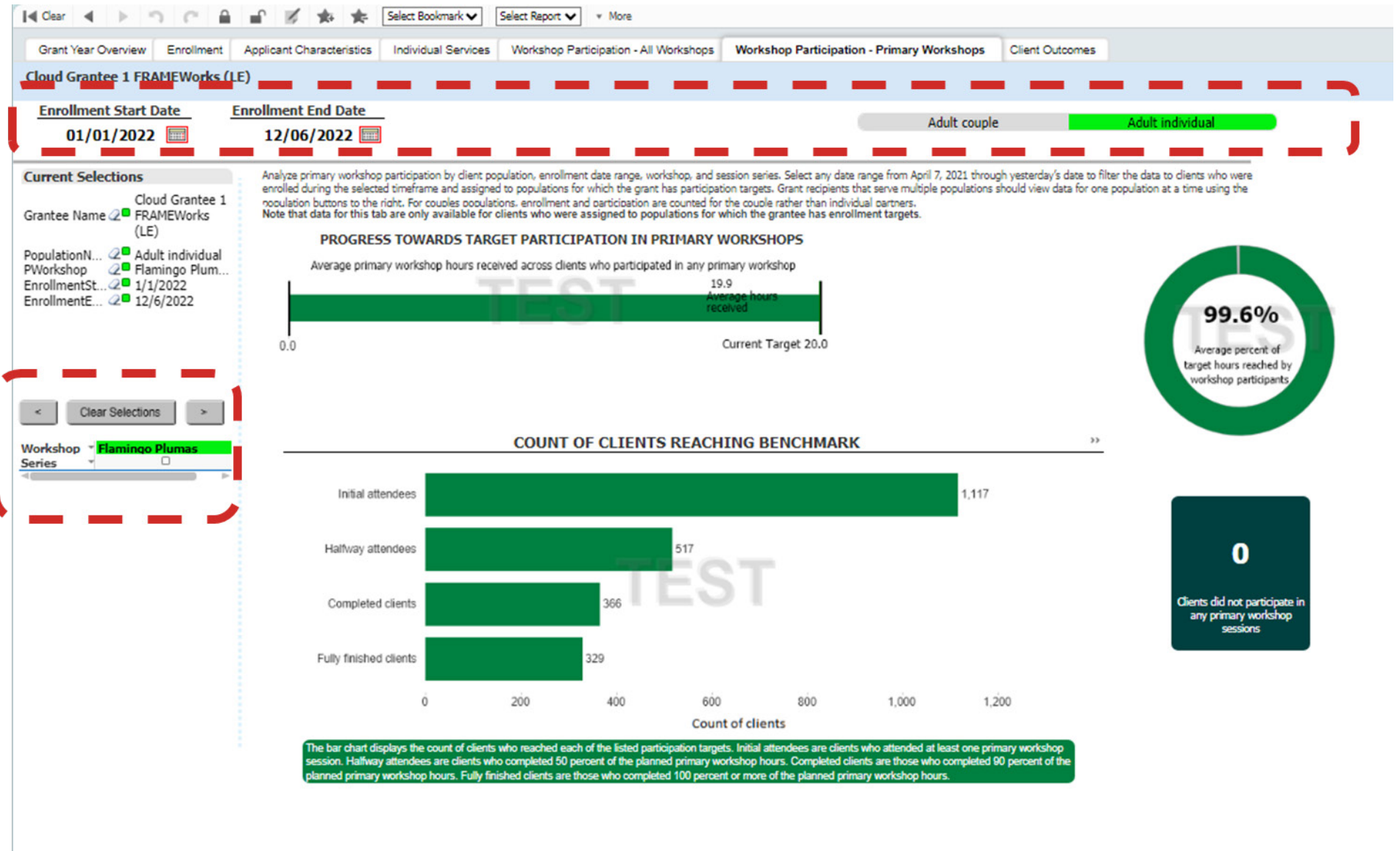


Identify who is attending specific workshops by using the population, workshop, and series filters



# Workshop Participation - Primary Workshops

Identify potential differences in primary workshop participation by population type (if applicable), cohort, workshop, and series





# Primary Workshop Participation Summary Report

Cloud Grantee 1 RF (LE)

Participation in Primary Workshop(s)\* - Summary Report

Clients Enrolled 9/30/2022 - 1/23/2024

Grantee	Client Population	Location	Number of Clients	Average Participation in Primary Workshop(s) (Hours)	Target for Participation in Primary Workshop(s) Hours	Average % of Target Participation (in Primary Workshop(s)) Achieved
Cloud Grantee 1 RF (LE)	Community couple		38	12.9	24.0	53.8%
		New Test Location [33]	6	8.0	24.0	33.3%
		New Test Location [x]	6	8.0	24.0	33.3%
		New Test Location [x] 2	3	11.3	24.0	47.1%
		Northwest Side	128	16.6	24.0	69.2%
		Southeast Side	116	16.9	24.0	70.4%
		The Equator	88	17.7	24.0	73.8%
		All	385	16.3	24.0	67.9%
	Community individual		46	16.7	16.0	104.4%
		New Test Location [33]	8	6.1	16.0	38.1%
		New Test Location [x]	9	7.0	16.0	43.8%
		New Test Location [x] 2	8	7.9	16.0	49.4%
		Northwest Side	127	21.5	16.0	134.4%
		Southeast Side	139	19.3	16.0	120.6%
		The Equator	107	21.3	16.0	133.1%
		All	444	19.4	16.0	121.3%

← Identify potential disparities in primary workshop participation by population and location





# Primary Workshop Participation Detail Report

## Families Together

### Participation in Primary Workshop(s)\* - Detail Report

Location	Client Population	Client ID	Couple ID (if applicable)	Client First Name	Client Last Name	Current Client Status	Enrollment Date	Entrance Survey Completion Date
Family Center	Adult couple	10001374	10101	Mickey	Mouse	Completed/Graduated	12/16/2021	12/17/2021
Family Center	Adult couple	10001400	10101	Minnie	Mouse	Completed/Graduated	12/16/2021	12/17/2021

Most Recent Primary Workshop Session Attended Date	Exit Survey Completion Date	Participation in Primary Workshop(s) Hours	Target for Participation in Primary Workshop(s) Hours	% of Participation in Primary Workshop(s)
2/8/2022		9	12	75.0%
2/8/2022		9	12	75.0%

Use this report to identify clients who are and are not completing primary workshops



Use the data export to conduct in-depth reviews of ISCs and workshop participation by select characteristics

**/ Service Contacts tab includes data on all recorded ISCs**

- Provides detailed information on the types of issues and needs covered during ISCs
- Also includes enrolled clients who have not yet received an ISC

**/ Session Attendance tab displays every recorded session attended by each client**

- Can be used to further filter and analyze primary and optional workshop attendance data by client-level if needed



**Questions?**



# Deep dive: Using nFORM 2.0 data tools to analyze trends in workshop participation



# Use the data export to monitor workshop participation trends by employment status

**Analysis goal:** To identify the number of community individual clients who have reached each primary workshop participation benchmark, and determine whether additional strategies are needed to increase participation for a specific group

## / **Analysis overview**

- Use the Survey Response data tab of the data export to merge data on employment status at enrollment into the Primary Workshop Participation Detail report
- Create a pivot table that shows the number of community individual clients who have achieved each primary workshop participation benchmark
- Determine whether new strategies are needed to improve workshop participation for a specific group in the target population—in this case, clients who are employed full-time



# Analysis steps

- / **Step 1: Generate an up-to-date version of your program's data export and save it to a secure local folder**
- / **Step 2: Generate an up-to-date version of your program's Primary Workshop Participation – Detail report and save it as an Excel file to a secure local folder**
  - Filter the report by clients who have had the opportunity to achieve the primary workshop participation target for their population type
  - Delete client names from the Detail report when no longer needed

Grantee	<input type="text" value="Grantee 1 HM (LE)"/>	Grantee Location	<input type="text" value="All Locations"/>
Start Date	<input type="text" value="4/7/2021"/>	End Date	<input type="text" value="10/24/2023"/>



# Analysis steps (cont. 1)

**/ Step 3: Insert six new columns in the operational report, one for each Employment Status option column on the Survey Response Data tab in the data export**

- Review the data dictionary to identify Employment Status options on the ACS

**/ Step 4: Use a formula to merge Employment Status data from the data export into the newly created columns**

- Each newly created column requires a minor edit to the formula to reference the correct employment status data—replace 53 with 54, 55, 56, 57, or 58

```
=VLOOKUP(C2,['DataExport.xlsx]Survey  
Response Data'!A:BF,53,FALSE)
```





# Analysis steps (cont. 2)

## / Step 5: Re-label the employment status columns to their descriptors

- E.g. Employment Status 1 becomes “Full-Time Employment” and so on

M	N	O	P	Q	R	S	T
Target for Participation in Primary Workshop(s) Hours	% of Participation in Primary Workshop(s)	Full-Time	Part-Time	Employed, but hours change	Temporary, Occasional, Seasonal	Stay-at-home	Not employed
24	54.17%	0	0	0	0	1	0
24	4.17%	1	0	0	0	0	0
24	20.83%	0	0	1	0	0	0
24	8.33%	0	0	0	0	1	0
24	4.17%	0	1	0	0	0	0
24	100.00%	1	0	0	0	0	0
24	100.00%	0	0	0	0	0	1
24	58.33%	0	0	1	0	0	0
24	66.67%	0	1	1	0	0	0
24	75.00%	1	0	0	0	0	0
24	50.00%	0	0	0	0	0	1
24	37.50%	1	0	0	0	0	0
24	20.83%	1	0	0	0	0	0
24	8.33%	1	0	0	0	0	0
24	8.33%	1	0	0	0	0	0
24	4.17%	1	0	0	0	0	0
24	100.00%	1	0	0	0	0	0





# Analysis steps (cont. 3)

- / **Step 6: Add a new column titled Benchmark Status**
- / **Step 7. Use the formula below to populate the Benchmark Status column with data**
  - This formula assigns a benchmark label to each client based on their percent of target hours reached

```
=CHOOSE(MATCH(TRUE, N2<= {0.5,0.9,1,100}, 0), "1. Initial attendee", "2. Halfway attendee", "3. Completed client", "4. Fully finished client")
```

M	N	O	U
Target for Participation in Primary Workshop(s) Hours	% of Participation in Primary Workshop(s)	Full-Time	Benchmark Status
24	54.17%	0	Halfway attendee
24	4.17%	1	Initial attendee
24	20.83%	0	Initial attendee
24	8.33%	0	Initial attendee
24	4.17%	0	Initial attendee
24	100.00%	1	Completed client

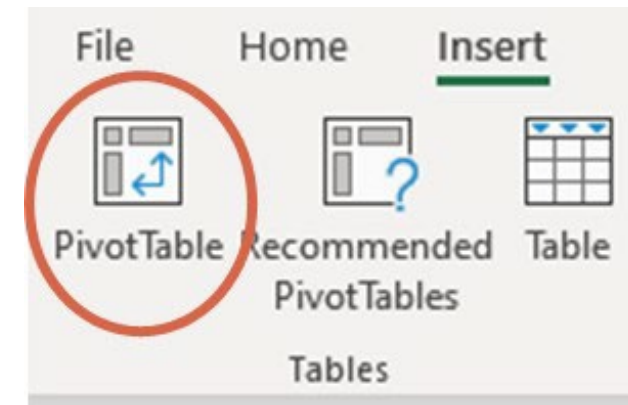
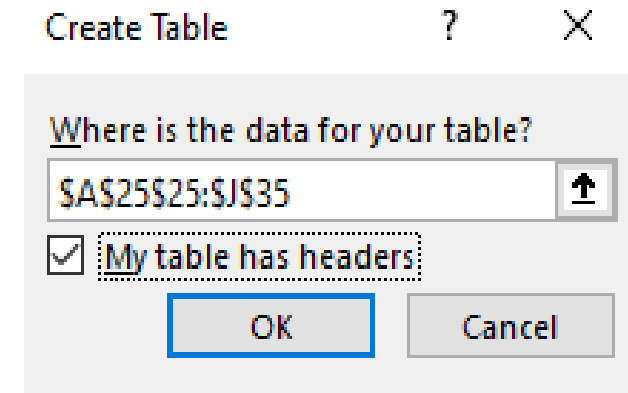


# Analysis steps (cont. 4)

**/ Step 8: Create a table of your data by highlighting your dataset and pressing Ctrl + T**

- Make sure the option “My table has headers” is selected

**/ Step 9: Go to the Insert ribbon and create a PivotTable in a new worksheet**





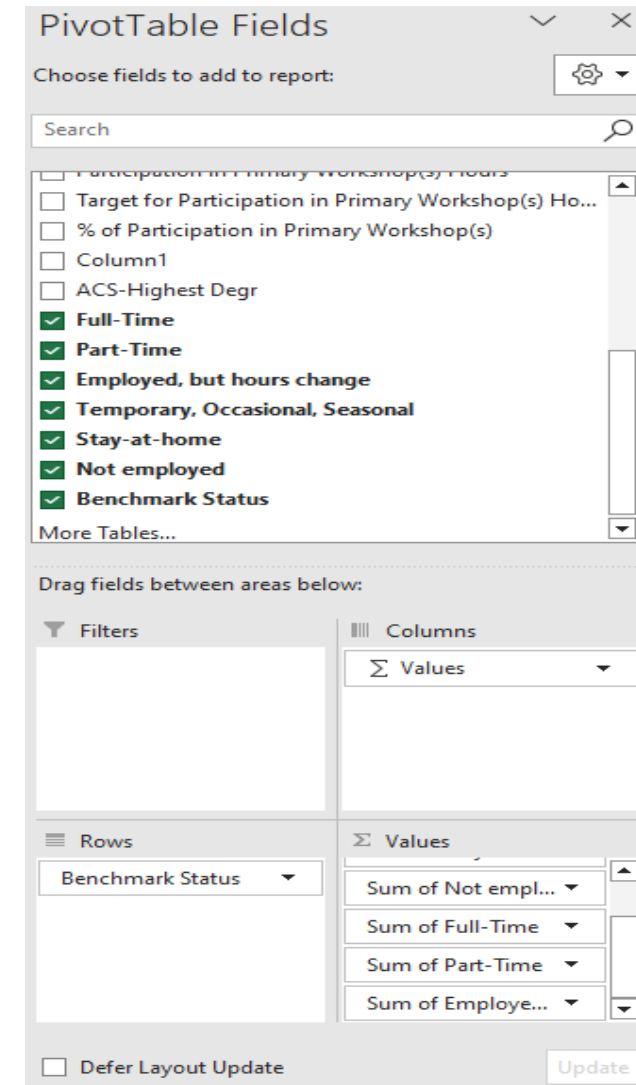
# Analysis steps (cont. 5)

## / Step 10: Add each employment status column under the Values section

- Keep as Sum calculation

## / Step 11: Add Benchmark Status under the Rows section

- The Columns field will auto-populate with the employment status data





# Analysis steps (cont. 6)

- / **Step 12: Reorder the Benchmark Status column to show progression from initial attendees at the top to fully-finished clients at the bottom**
- / **Step 13: Review the pivot table to identify primary workshop participation differences by employment status**

<b>Benchmark Status</b> <input type="text"/>	<b>Sum of Temporary, Occasional, Seasonal</b>	<b>Sum of Stay-at-home</b>	<b>Sum of Not employed</b>	<b>Sum of Full-Time</b>	<b>Sum of Part-Time</b>	<b>Sum of Employed, but hours change</b>
Initial attendee	0	1	1	7	1	1
Halfway attendee	0	1	1	2	1	2
Completed client	0	1	0	2	0	0
Fully finished client	1	0	1	1	0	0
<b>Grand Total</b>	<b>1</b>	<b>3</b>	<b>3</b>	<b>12</b>	<b>2</b>	<b>3</b>



# Analysis steps (cont. 7)

- / Step 14: Consult with your program's CQI team on developing and testing strategies to improve participation among employed clients**
- / Step 15: Summarize your findings and CQI strategies for improving equity in your quarterly narrative**
  - Programs can also analyze employment status at exit to measure progress on this strategy



# Example response in progress narrative

## 7. Equity-related activities

Please describe any activities you or your subrecipients conducted during the reporting period to address or advance equity as part of this project.

The term “equity” means the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment, such as Black, Latino, and Indigenous and Native American persons, Asian Americans and Pacific Islanders and other persons of color; members of religious minorities; lesbian, gay, bisexual, transgender, and queer (LGBTQ+) persons; persons with disabilities; persons who live in rural areas; and persons otherwise adversely affected by persistent poverty or inequality. Use additional pages if needed.

We conducted an nFORM analysis to understand whether there are differences in primary workshop completion by employment status. We identified that over half of our clients who were employed full time were only attending the first session in our primary workshop and not reaching the target goal of 24 hours. Using CQI to understand the root causes of our challenge, we learned that our current structure of offering 6 4-hour sessions was difficult for full-time employed clients to commit to. During the reporting period, we developed a strategy to offer two workshop series formats that clients can choose from based on their scheduling needs. We will continue to offer series that include 6 4-hour sessions, and will also offer 12 2-hour sessions. We will road test this strategy with the next cohort and report our findings during regular meetings with our FPS and on the progress narrative of the next quarterly report.

# Please share with us...

**What tips do you have for using nFORM to understand potential disparities in workshop participation and individual service delivery in your program?**

**Add your thoughts or suggestions to the chat, or let us know if you would like to share aloud!**



# Announcements





# Resource updates and office hours

**/ Review the updated [IRB manual](#) on the HMRF Grant Resources site for additional considerations for grantees conducting CQI, local evaluations, or participating in federal evaluations**

- Also includes detailed information on how to update nFORM when clients revoke consent

**/ Save the date for upcoming office hours**

- CQI office hours on Tuesday, February 27 from 2-3pm ET
- nFORM office hours on Tuesday, March 12 from 2-3pm ET





# Questions?

