Telling your program's story with nFORM and CQI data

February 25, 2025
nFORM 2.0 and CQI Teams
Mathematica

Housekeeping

/ **Use the chat to ask questions**

/ **Click on the link in the chat to access closed-captioning**
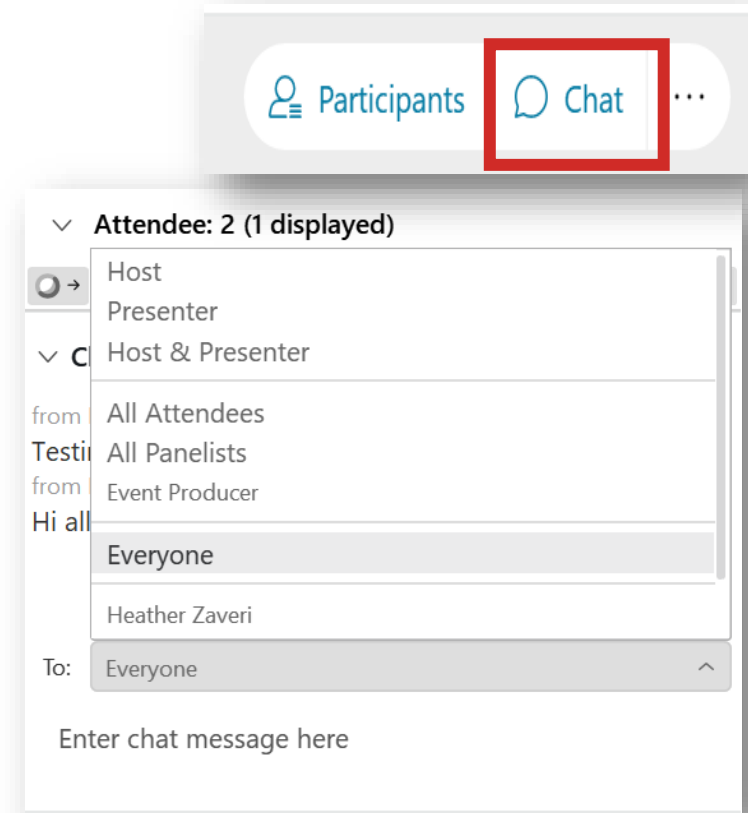
REMINDERS:

/ **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 nFORM updates**

/ **Using data to tell your program's story**

/ **Outlining your program's story**

/ **Example story about recruitment and enrollment**

/ **Announcements**

Recent nFORM updates

Updates to PPR, School Year Report, and Program Operations Survey

/ **PPR Section C-02.1.1 and School Year report will display only percent of applicants who respond Female or Male to ACS A1**

/ **Program Operations Survey questions B3a-B3d will ask what proportion of staff are either Male or Female**

/ **Updates reflected in PPR and Program Operations Survey templates on Grant Resource site**

/ **Updates will be reflected in nFORM soon; unavailable until then**

Updates to query tool

/ **Removed "Other" responses to ACS A1 from displays and filters on Applicant Characteristics and Client Outcomes tabs**

/ **Filter labels on Applicant Characteristics and Client Outcomes tabs display "Sex"**

/ **Legend on All Workshops tab display "Sex" and only Female and Male (pie chart only includes these response options)**

Updates to query tool (contd.)

Applicant Characteristics tab filter

Characteristic
Age
Employment Status
Ethnicity
Partner Status
Race
Sex

Sex
- Female
- Male

Male 50.1%   49.9% Female
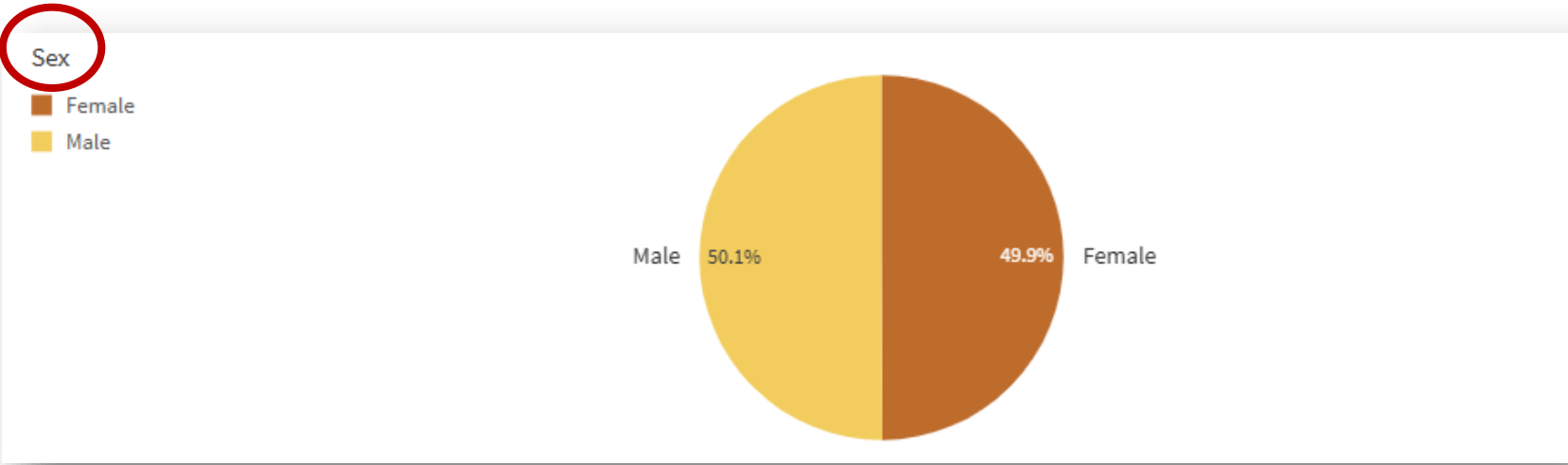
Workshop Participation – All Workshops tab

Client profile updates

/ **Client information box no longer displays responses to ACS A1**

/ **Updated ACS still accessible on each client's profile**

nFORM TA resources updates

/ **Revising nFORM TA resources to reflect nFORM changes and respond to federal requirements**

/ **Updated resources will be posted to the HMRF Grant Resource site**

- nFORM 2.0 User Manual

- Data dictionary

- Data export template

- HRMF Performance Measures Sources Manual

Using data to tell your program's story

The importance of strategic communication

/ **Build support to sustain your program**

/ **Share what you accomplished, but also *how* you achieved success**

- Share what you've learned through CQI about how to implement well

/ **Consider your audience when deciding what to share**

- Why are they interested in your program?

- What questions might they have about your program?

Use the GAME framework

What are the **Goals** of the communication? Who is the **Audience?**

What do the key **Messages** need to be?

How will you reach them (**Expression)?**

Goals

/ **Start with your goals: what do you want to achieve by sharing your story?**

- Motivate action (funders, community leaders)

- Gain commitment (partners)

- Provide information/train (staff)

- Recruit/build interest (participants)

/ **Make your goals SMART so your team can track how well a communication strategy is working**

- For example, motivate two community leaders to support the program's plans for sustainability

Audience

/ Who is the primary audience for each communication?

- Develop a persona for each audience to help clarify what messages will resonate

/ What do they care about and want to see you address?

- For example, do community leaders want to see plans for sustaining services over time?

/ What is the call to action? What are you asking of them?

- For example, are you asking partners to spread the word about your program, or to commit to recruiting participants?

Messages

/ **Use your audience analysis to determine what to share about your program's accomplishments and path to success**

/ **Draw on a range of voices to shape messages**

- Alumni are a good source for shaping messages, because they experienced the program and can offer that perspective

/ **Test out messages with your audience to gather feedback and refine**

- If you're not sure about the key message, convene a focus group of participants/staff to give feedback; for example, on recruitment messages or a one-pager about the value of the program

Example

Goal: Our program serves a large, urban area and we wanted to expand into rural communities. We want to communicate how we did with current and potential partners in rural areas of the county.

Describe how you got there, drawing on shorter-term outcomes

- We used program champions from the rural communities to inform others in their network about the program
- We saw an overall increase in enrollment and the portion of clients who learned about the program through word-of-mouth increase from 43% to 72%

Describe the overall achievement

- We began offering our program in five previously underserved, rural towns
- 78% of those clients reported that the program was very helpful for their parenting and co-parenting

Expression

/ **Develop anchor content to tell your program's whole journey**

/ **Create a story bank—a collection of smaller stories for different audiences**

/ **Consider the best way to reach each audience, such as**

- Social media post
- Community newspaper or newsletter
- Presentations at community meetings, schools, places of worship
- Tables/booths at community events

/ **Keep track of which audience you shared each story with and how they responded**

Outlining your program's story

What to include in your story?

Our program's mission and goals

Challenges we encountered

Share data to illustrate the challenge and its root causes

Strategies to address those challenges

Use interim data that speaks to lessons learned

Results

What were your ultimate outcomes?

Plans for the future

What is your call to action?

How to find the data for our story in nFORM

QPR/PPR
- Year-to-date progress on HMRF performance measures
- Generate current and past QPR or PPR (and school year performance report for R4L grantees) at any time for updated information on grant performance

Query tool
- Seven separate tabs show visualizations of aggregate progress on client measures
- Explore performance by different factors including time frame, applicant characteristics and service type

Operational reports
- 15 topic-specific reports available in Excel
- Include summary and detailed reports to be reviewed individually or combined
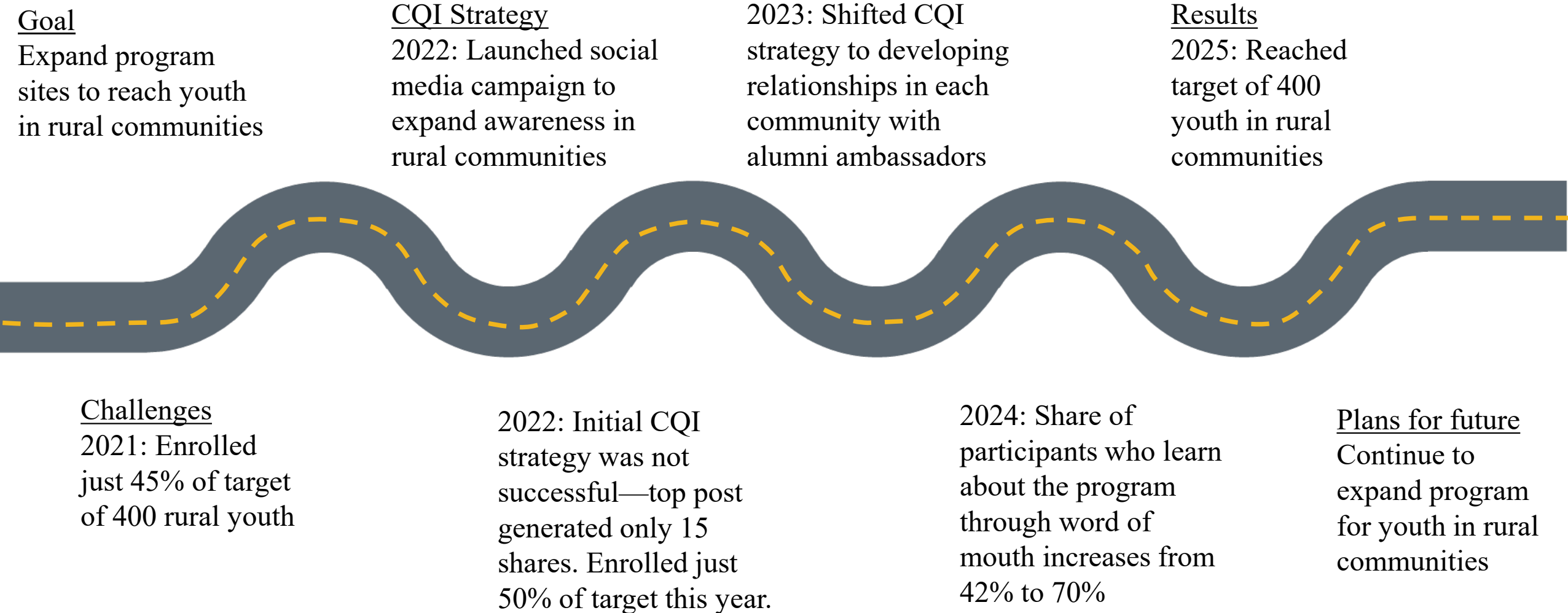
Data export
- Access all detailed nFORM data except for PII
- Data organized on separate tabs by data type for in-depth analyses

Incorporate data from other sources

/ **Data from CQI efforts (e.g. trackers, exit tickets)**

/ **Feedback collected from interviews and focus groups**

/ **Data collected outside of FORM**

- For example, information on outreach and recruitment activities or social media analytics

/ **Information from completed QPR/PPR narratives**

Example story

Goal
Expand program sites to reach youth in rural communities

CQI Strategy
2022: Launched social media campaign to expand awareness in rural communities

2023: Shifted CQI strategy to developing relationships in each community with alumni ambassadors

Results
2025: Reached target of 400 youth in rural communities

Challenges
2021: Enrolled just 45% of target of 400 rural youth

2022: Initial CQI strategy was not successful—top post generated only 15 shares. Enrolled just 50% of target this year.

2024: Share of participants who learn about the program through word of mouth increases from 42% to 70%

Plans for future
Continue to expand program for youth in rural communities

Example story about recruitment and enrollment

Initial plans to recruit and enroll clients

/ **Who is your target population?**

    - Be as descriptive as possible

/ **What was your plan to reach them?**

/ **Why did the program feel this would be most effective?**

Unexpected challenges

/ **What got in the way of meeting recruitment and enrollment targets? Why?**

- For example, were struggles the same across recruiting partners?

- Use data, as applicable, to describe challenges

/ **How did these challenges affect the program? How did they prevent us from reaching our goals?**

Describe recruitment strategies and results

/ **What CQI strategies did you try? Why?**

/ **What were the most effective CQI strategies for recruiting clients?**

/ **Why did clients enroll in the program?**

/ **Did you achieve enrollment targets?**

/ **What other indicators did you use to measure recruitment success?**

Consider differences in client participation based on referral source and reason for enrolling
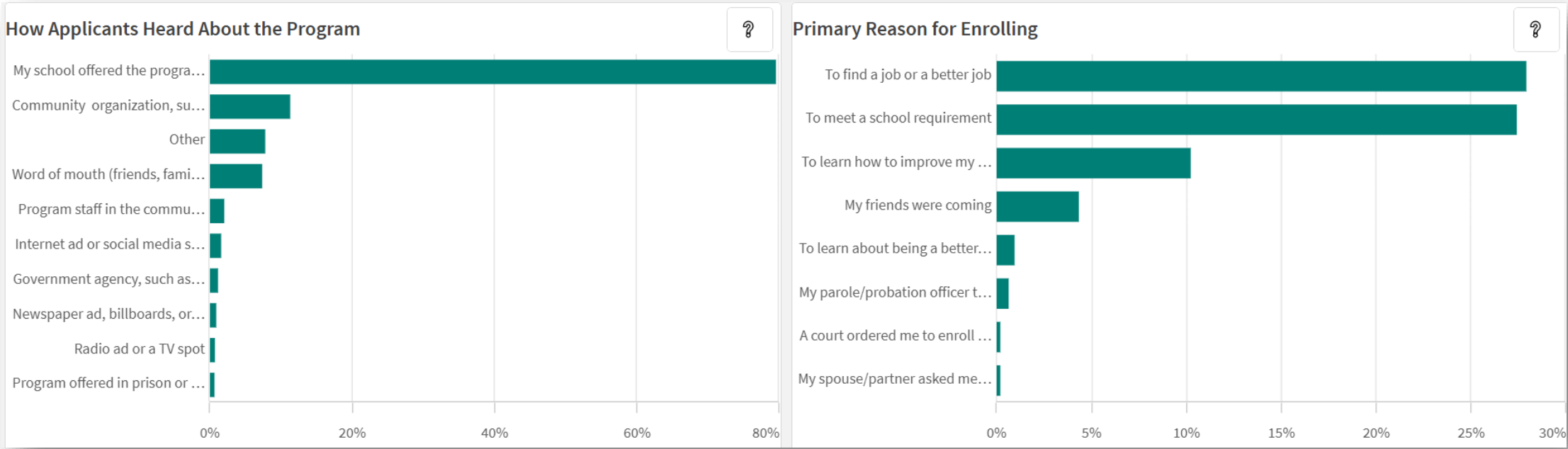
nFORM data sources on recruitment

Tool	Data points
Query tool	**Enrollment tab**: Bar charts on how applicants heard about the program and primary reason for enrolling
Data export	**Client Info tab**: Referring organization name and type **Program Operations Survey tab**: Advertising and recruitment methods and challenges and agencies that provided referrals

Use the data dictionary on the HMRF Grant Resource site to review details of each variable and meaning of the values associated with each variable

Review the Enrollment tab of the query tool for client referral source and reason for enrolling

Use the population (if applicable) and enrollment date filters to review enrollment trends across client groups or cohorts

nFORM data sources on enrollment

Tool	Data points
Query tool	**Grant year overview tab:** Number of clients enrolled in the current grant year and number of clients enrolled by month **Enrollment tab**: Number of clients enrolled by all grant years and number of clients enrolled by month and location
Survey Completion Summary operational report	Number of clients who completed the Applicant Characteristics Survey (ACS)
Local Evaluation Enrollment operational report	Number of clients enrolled in local evaluation by service assignment

Use the query tool Applicant Characteristics tab to review who enrolled

For information on all client characteristics, review the Survey Response Data tab of the data export
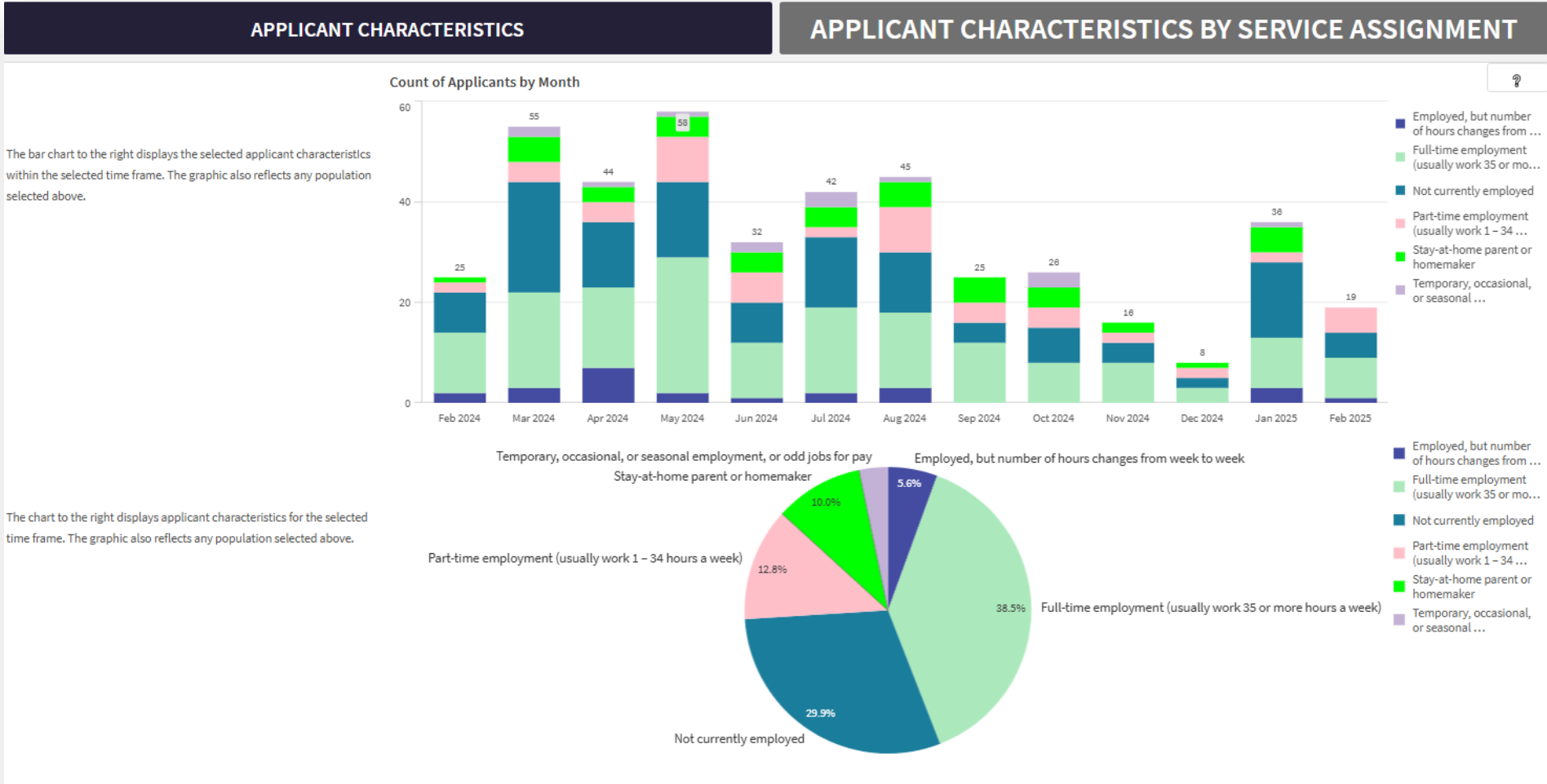
Other sources of data

/ **Participant feedback or testimonials**

/ **Staff or partner stories**

/ **Internal tracking**

- Draw on data you might have tracked separately as part of CQI efforts
- What did you learn?

/ **Quarterly narrative reports**

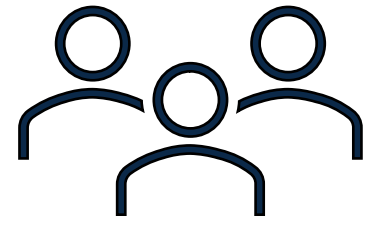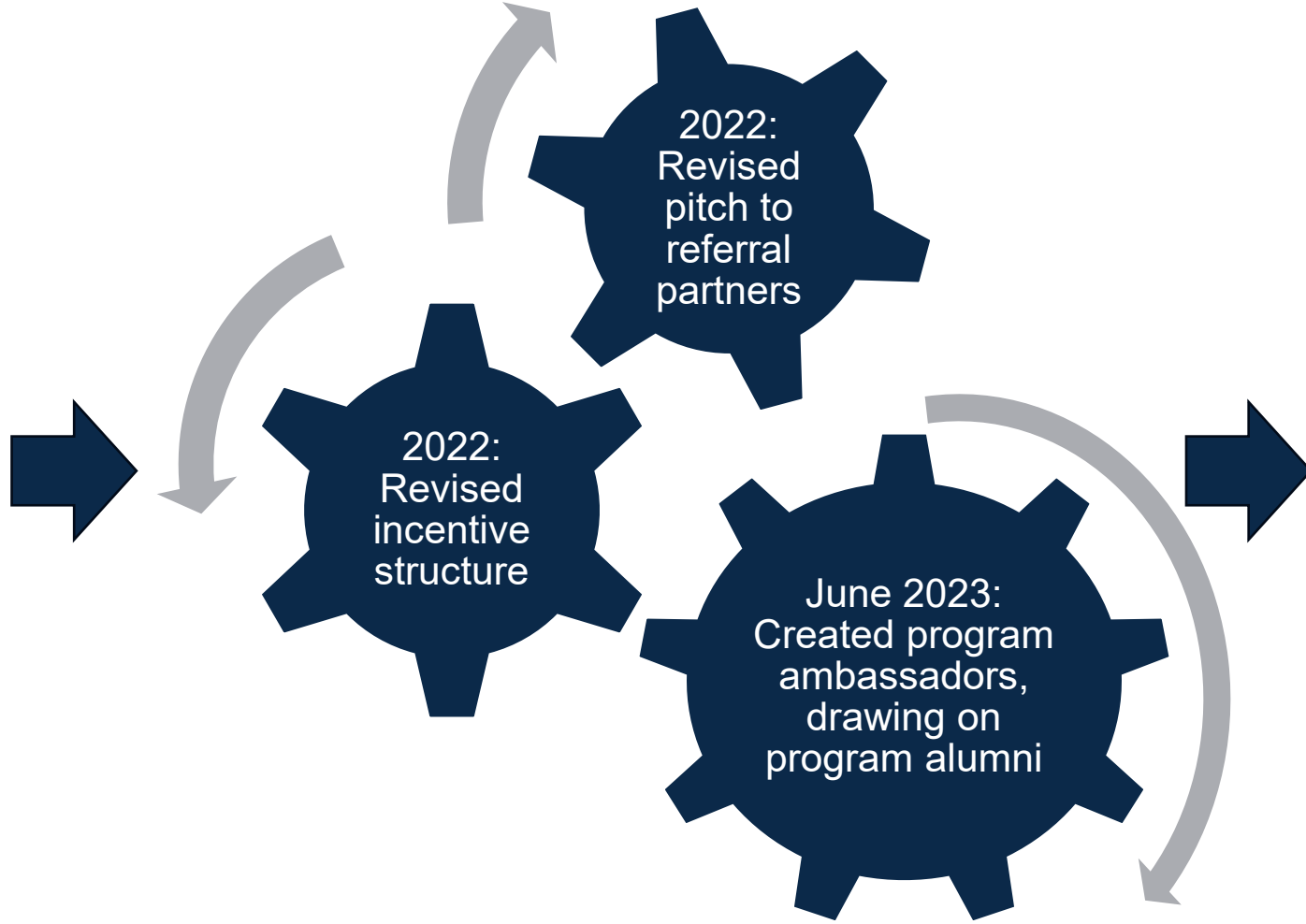"My cousin told me how helpful the program was for her marriage, so I asked her where do I sign up?"

"When we observed the positive impact the HMRE program was having on the parents we served, we started referring all of our clients!"

Example story on recruitment and enrollment

Goal: Enroll 1,500 clients into the program
Challenge: Missed targets in first two years

2022: Revised pitch to referral partners

2022: Revised incentive structure

June 2023: Created program ambassadors, drawing on program alumni

Enrolled more than 2,000 adult individual clients, exceeding enrollment target by 500
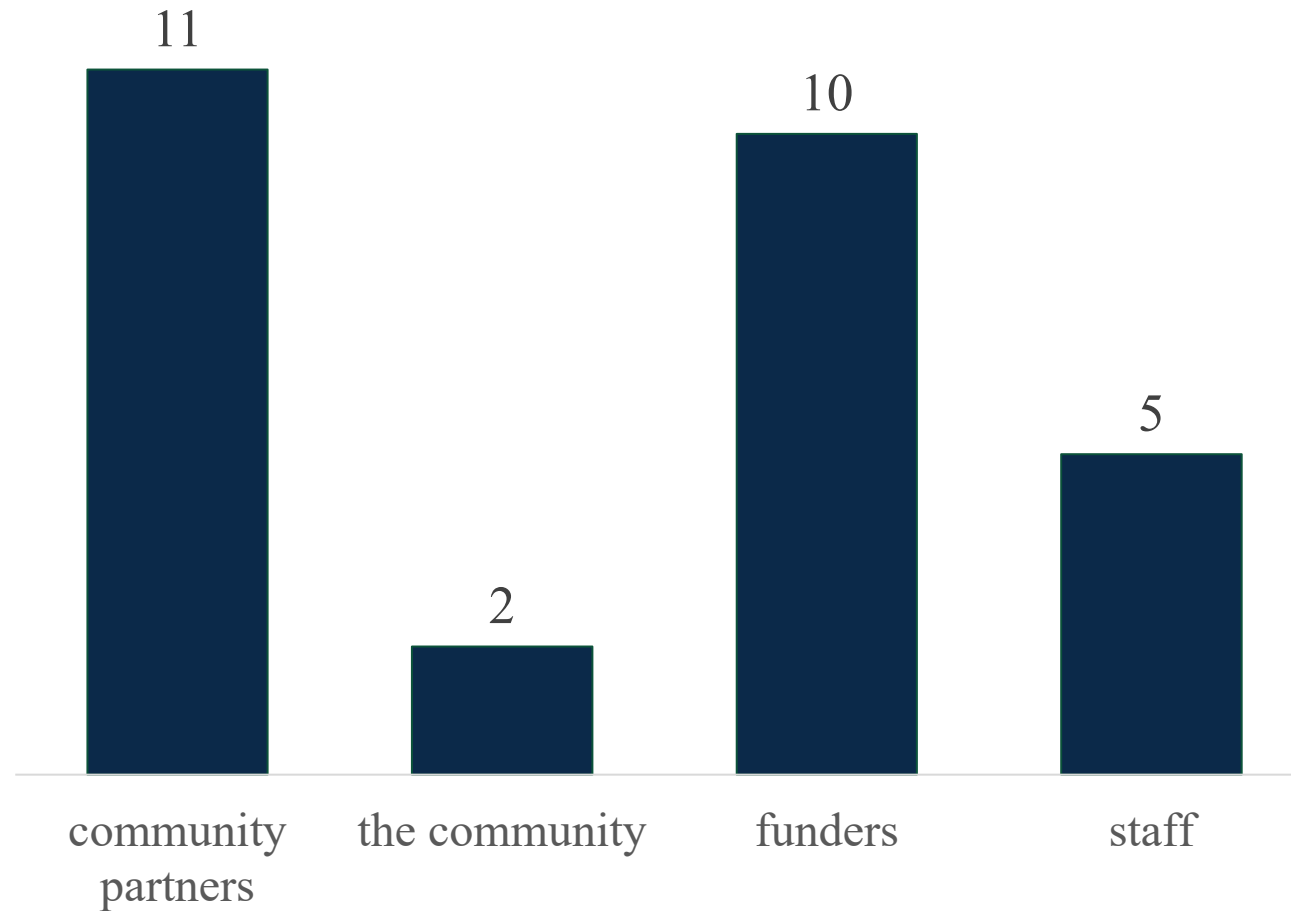
Share with us

> ## What audience(s) should hear your program's story?

Use the Slido poll to enter one or more responses

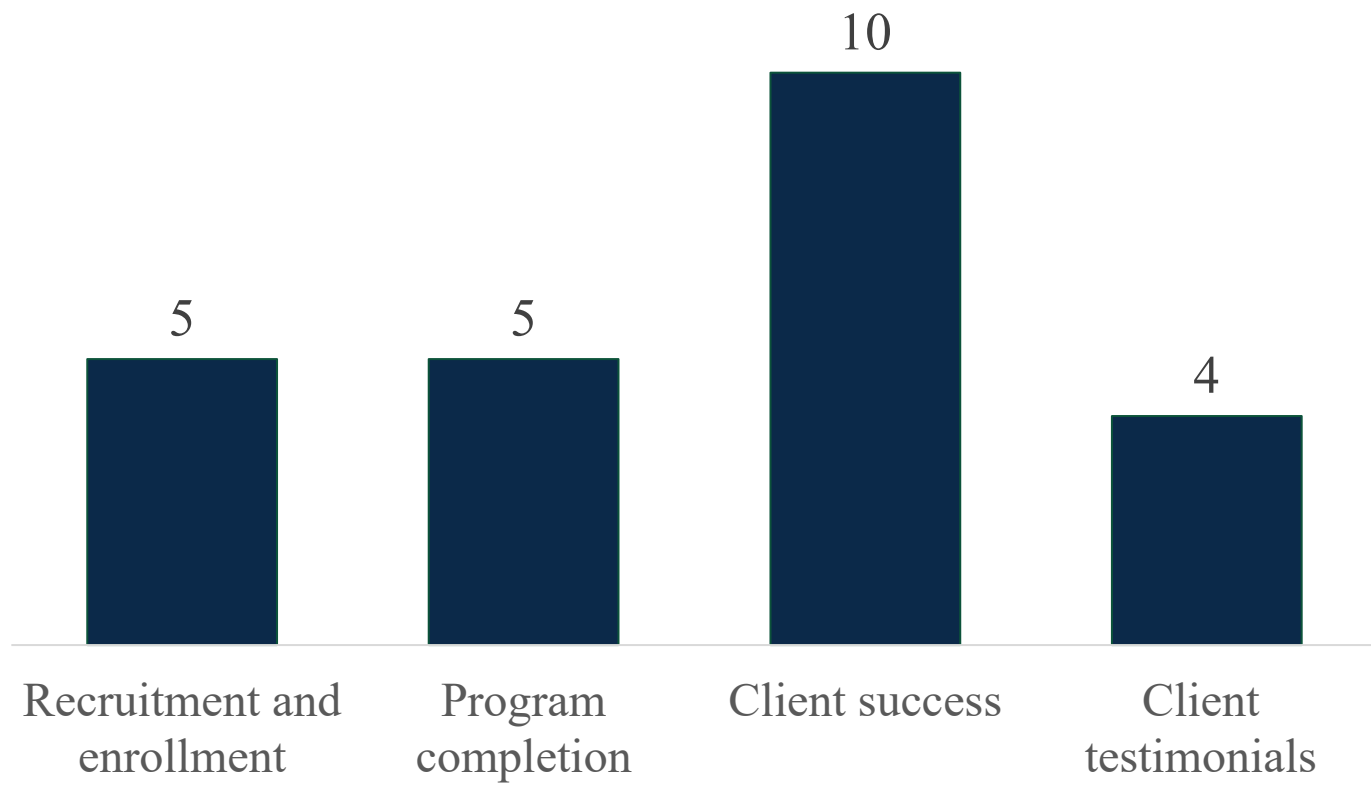# What audience(s) should hear your program's story?

11	2	10	5
community partners	the community	funders	staff

Share with us (contd.)

> **What successes would you share with your audience(s)?**

Use the Slido poll to enter one or more responses

What successes would you share with your audience(s)?

A bar chart with the following values:

Recruitment and enrollment	Program completion	Client success	Client testimonials
5	5	10	4

Share with us (contd.)

What else might your audience(s) want to know about your program?

Use the Slido poll to enter one or more responses

Share with us (contd.)

How minds and behaviors were changed.

Staff qualities (professionalism and being relatable.

improving data-driven insights through enhanced survey participation, streamlined outreach, and impactful incentives

Participant focus group insight

relationship satisfaction for short or long term relationships

Partners should know the benefits shared by participants

team member experience and credentials

Referral source and how challenges were mitigated (for funder), incentives (for prospective clients)

Successful referrals to other agencies, that promotes participants positive outcomes.

Keeping participants engaged through outreach check ins has shown participants personal growth and increased cross program participation

challenges that created learning experiences/success

Share with us (contd.)

What are the next possible actions to continue success

Participants change in attitude or behavior

the impact will bring to future generations

The impact of the program for participant well-being; successful recruitment strategies

Return on investment (ROI)

What education did the participants retain over time?

Most successful methods used for achieving goals

Most successful methods used for achieving goals

Family outcomes from specific ethnicities

Announcements

Announcements

/ **Save the date for the March 11 nFORM office hours (2-3pm ET) on using nFORM data to complete the progress narrative**

/ **Join us on March 25 (2-3pm ET) for CQI office hours on using survey data for CQI**

/ **Check out …**

- HMRF Grant Resource Site for nFORM 2.0 and HMRF CQI resources
- OPRE Resource Library for resources related to HMRF and other grant programs

/ **For nFORM questions, submit a help desk ticket in nFORM**

/ **For CQI-related questions, reach out to the CQI helpdesk**

- HMRFCQI@mathematica-mpr.com