From reports to results: Grant recipient approaches to analyzing nFORM 2.0 data

June 10, 2025 nFORM 2.0 Team Mathematica

OFFICE OF FAMILY ASSISTANCE — OPRE

An Office of the Administration for Children & Families





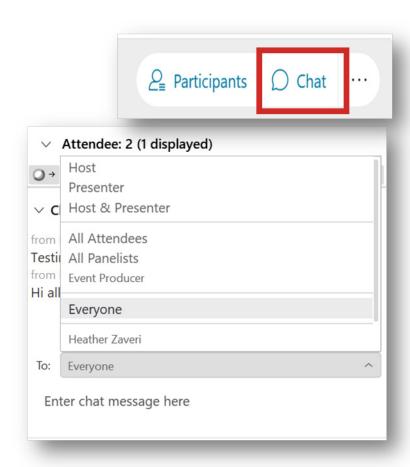






Housekeeping

- / 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

- / Data export updates
- / Panel discussion: Analyzing nFORM 2.0 data
 - Bethany Christian Services of Georgia
 - Utah State University
- / nFORM Q&A
- / Announcements



Data export updates



Data export updates to align with Executive Order #14168

/ Survey Response Data tab

- "ACS-Gender" field label will be updated to "ACS-Sex"
 - Values of 1, 2, 4, or blank will continue to output based on historical survey responses
- "ACS-Gender_spec" field and historical responses will be removed entirely

/ Program Operations Survey tab

- Term "Gender" will be updated to "Sex" in field labels for staff characteristics (columns CX-DG)
- "Gender 4" fields for all staff types will be removed
- / If your grant developed analytic code based on current layout of data export, revise code to account for updates to field names and column positions



nFORM resource updates

- / Data Dictionary shows updated field labels and data values
- / Data Export Template reflects updated layout and field positions on Survey Response Data and Program Operations Survey tabs
- / Performance Measures Sources manual also updated to include notes about survey updates



Keep an eye out for one more email!

- / Advance emails sent to nFORM users on May 28 and June 5 described data export changes
- / nFORM TA team will send a third email June 11 around 9am ET announcing updated data export availability
- / Discuss changes with all staff who use data export





Questions?



Panel discussion: Analyzing nFORM data



Today's presenters



Nolan Wagner (Data manager)



Samuel Phelps (Data manager)



Grant recipient panel questions (1/2)

How does your program use Excel or other programs to review and analyze nFORM data?

How do you share your findings with others?

Using nFORM for Custom Reviews

Dreams4U Atlanta, GA



Agenda

- 1. Short overview
- 2. Randomizing or Selecting a Client List
- 3. Conditional Formatting
- 4. COUNTIF Formulas

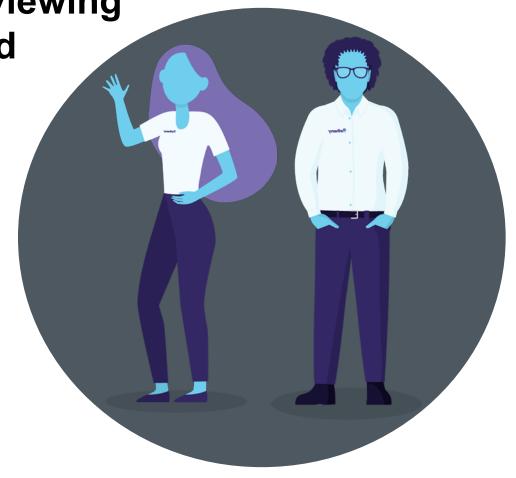
***All PII has been removed and replaced



Short Overview

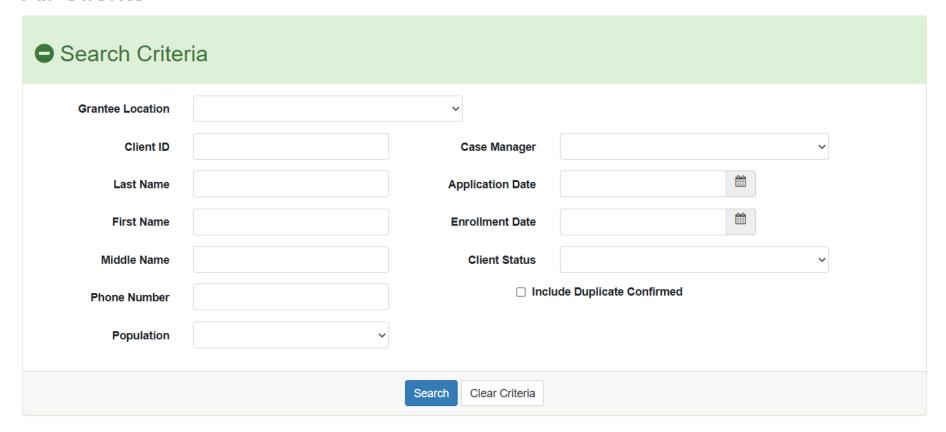
nFORM has great reporting, but when reviewing more detailed points you sometimes need to go into the case itself to view its contents.





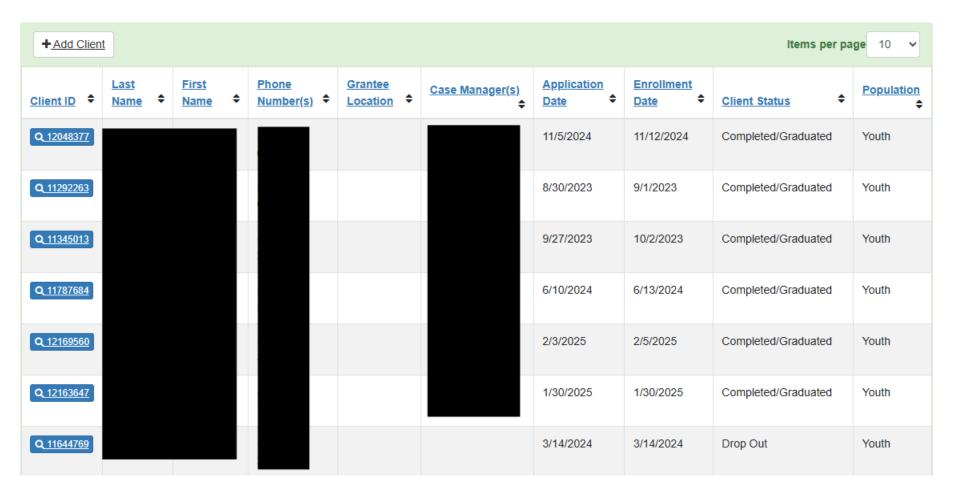
Searching for clients (1/2)

All Clients





Searching for clients (2/2)





When it's time to use nFORM reports...





Confirm Form Resubmission

This webpage requires data that you entered earlier in order to be properly displayed. You can send this data again, but by doing so you will repeat any action this page previously performed.

Press the reload button to resubmit the data needed to load the page.

ERR_CACHE_MISS



Using the Caseload Summary report





Staff with Case Management Capability	Assigned Client Study ID	Client Status	Application Form Completed by	Enrollment Date	Most Recent Service Contact Date	Most Recent Workshop Session Attended Date	# of referrals requiring follow-up	# of incentives provided
Mickey Mouse	12254349	Active	Mickey Mouse	3/20/2025	4/7/2025	4/2/2025		2
Mickey Mouse	12293177	Active	Mickey Mouse	4/10/2025				
Mickey Mouse	12293216	Active	Mickey Mouse	4/11/2025				
Mickey Mouse	12256350	Active	Mickey Mouse	3/26/2025		3/26/2025		2
Mickey Mouse	12254239	Active	Mickey Mouse	3/19/2025				
Mickey Mouse	12253803	Active	Mickey Mouse	3/26/2025		3/26/2025		2
Mickey Mouse	12254284	Active	Mickey Mouse	3/18/2025	4/7/2025	4/2/2025		2
Mickey Mouse	12253081	Active	Mickey Mouse	3/18/2025	3/27/2025	4/2/2025		2
Mickey Mouse	12254381	Duplicate confirmed	Mickey Mouse					
Mickey Mouse	12254048	Active	Mickey Mouse	3/18/2025	4/10/2025	4/2/2025		2
Mickey Mouse	12282007	Duplicate pending	Mickey Mouse					
Mickey Mouse	12293135	Applicant pending enrollment	Mickey Mouse					
Mickey Mouse	12252820	Active	Mickey Mouse	3/18/2025	4/11/2025	4/2/2025	0	2
Mickey Mouse	12254307	Active	Mickey Mouse	3/21/2025		4/2/2025		2
Mickey Mouse	12252817	Active	Mickey Mouse	3/18/2025	3/27/2025	4/2/2025	1	2
Luke Skywalker	11345013	Completed/G	Robin Hood	10/2/2023	12/21/2023	10/26/2023		7



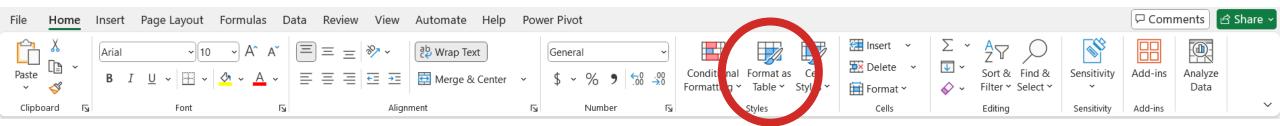


Filters & Randomization

Getting the samples you want...



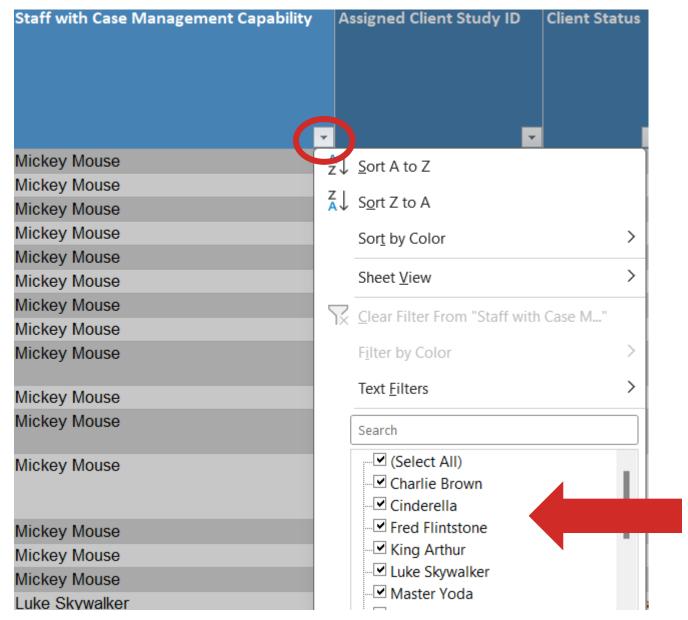
Selecting and randomizing a client list...



- Select all your data with "ctrl+A"
- Format as a table



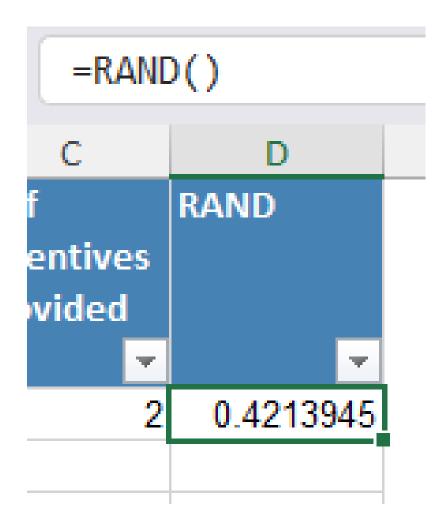
Filtering nFORM data

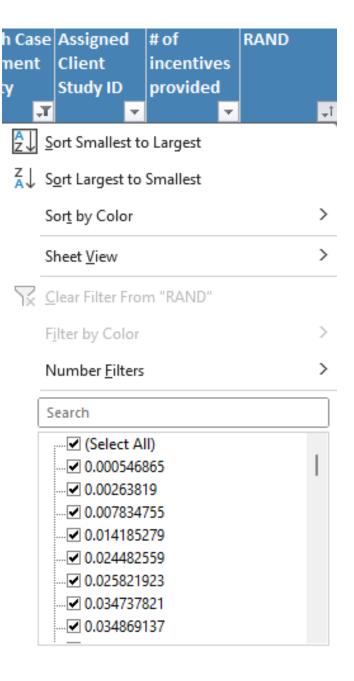




Still too big? (1/2)

- Create a new column
- =RAND()
- Then, sort again







Still too big? (2/2)

- Now just Copy & Paste
- And you have the random client list



4	Α	В	С	D	
	Staff with Case	Assigned	# of	RAND	
	Management	Client	incentives		
	Capability	Study ID	provided		
1	,T	▼	•	₩Î	
2	Robin Hood	11345330		0.22360609	
3	Robin Hood	11696270		0.09110762	
4	Robin Hood	10447093	7	0.34612561	
5	Cinderella	11643605	7	0.35395903	
5	Yogi Bear	12163508	7	0.38503015	
7	Unassigned	11003627		0.12370311	
9	Robin Hood	11345110		0.31319735	
1	Cinderella	11550138	7	0.11251288	
2	Unassigned	10449813	3	0.6808801	
3	Unassigned	11061009		0.72214884	
4	Yogi Bear	12281697		0.2140731	
6	Charlie Brown	11893824	4	0.42928615	
8	Master Yoda	11005900		0.66342737	
9	Unassigned	10383966		0.50564144	
0	Cinderella	11150172	7	0.62407746	
1	Robin Hood	10390470	6	0.82877046	
2	Unassigned	11835866		0.29548841	
23	Scooby Doo	10837218	5	0.25448641	
4	Unassigned	10093861		0.10651502	
25	Robin Hood	10390535	7	0.7508724	
6	King Arthur	11141123	7	0.24273686	
7	Yogi Bear	11621915	7	0.5160699	
8	Unassigned	10650424	4	0.050773	
9	Scooby Doo	10874488	7	0.90930394	
0	Robin Hood	11397113		0.12522988	

Now you have the sample...

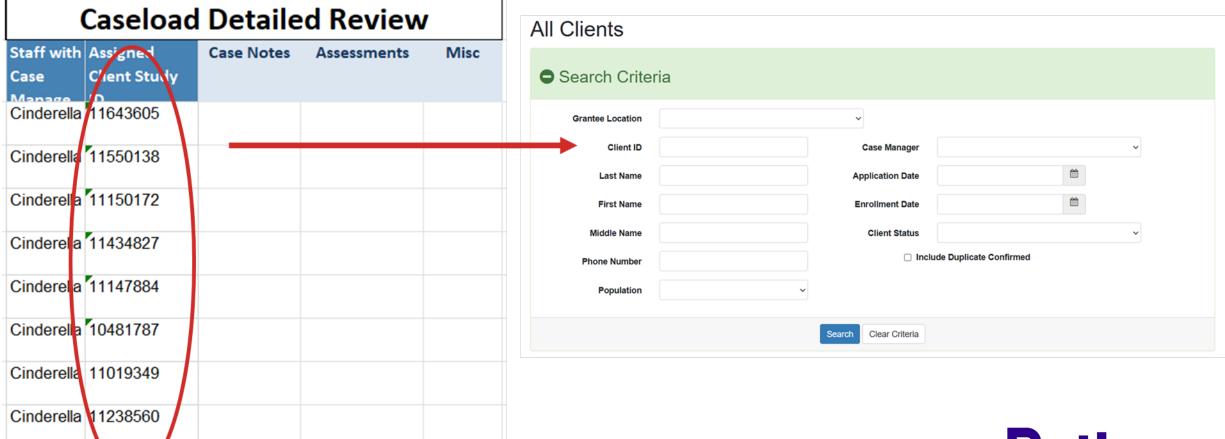
- Title your review
- Add the topics you are reviewing
- Then hide anything you do not need

Caseload Detailed Review

Staff with Case	Assigned Client Study	Case Notes	Assessments	Misc
	ın '			
	11643605			
Cinderella	11550138			
Cinderella	11150172			
Cinderella	11434827			
Cinderella	11147884			
Cinderella	10481787			
Cinderella	11019349			
Cinderella	11238560			



Now we can review...





We have a customized report!

Caseload Detailed Review					
Staff with	Assigned	Case Notes	Assessments	Misc	
Case	Client				
	11643605	Y	Υ	N	
Cinderella	11550138	N	Y	Υ	
Cinderella	11150172	N	Υ	Y	
	11434827	Υ	Υ	Υ	
Cinderella	11147884	Y	Υ	Υ	
	10481787	Y	Υ	Υ	
Cinderella	11019349	Y	N	N	
	11238560	Υ	Υ	N	
Cinderella	10311789	Y	N	N	
Cinderella	11224341	Υ	Υ	Y	



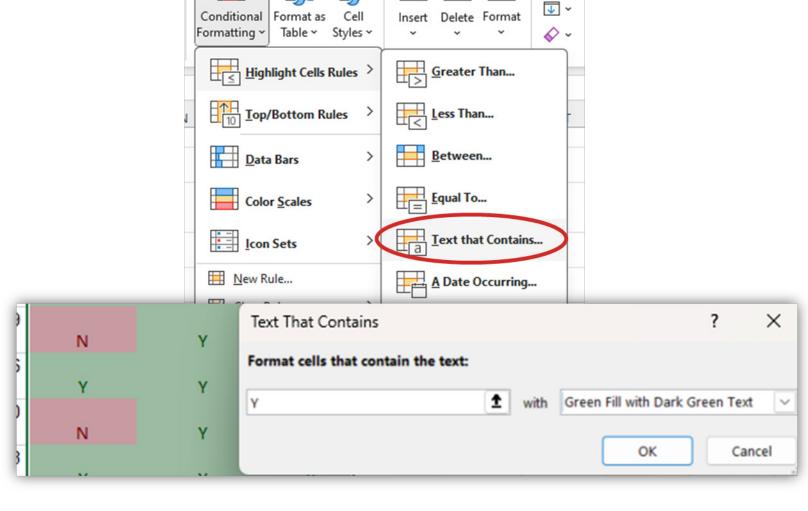
Visualize the results with Conditional Formatting

Showing others your results clearly...



Using conditional formatting (1/2)

Caseload Detailed Review Staff with Assigned Case Notes **Assessments** Misc Client Case Cinderella 11643605 Ν Cinderella 11550138 Cinderella 11150172 Ν Cinderella 11434827 Cinderella 11147884 Cinderella 10481787 Cinderella 11019349 Cinderella 11238560 Cinderella 10311789 Ν Ν Cinderella 11224341





Using conditional formatting (2/2)

Caseload Detailed Review

Staff with	Assigned	Case Notes	Assessments	Misc	
Case	Client				
Manage	Study ID				
Cinderella	11643605				
		Υ	Υ	N	
Cinderella	11550138				
		N	Υ	Υ	
Cinderella	11150172				
		N	Υ	Υ	
Cinderella	11434827				
		Υ	Υ	Υ	
Cinderella	11147884				
		Υ	Υ	Υ	
Cinderella	10481787				
		Υ	Υ	Υ	
Cinderella	11019349				
		Υ	N	N	
Cinderella	11238560				
		Υ	Υ	N	
Cinderella	10311789				
		Υ	N	N	
Cinderella	11224341				
		Υ	Υ	Υ	
Cinderella	10696637				
		N	Υ	Υ	



Calculating the results with COUNTIF Functions

Know exactly the proportion of desired results...



Calculating the results with COUNTIF formulas...

Percer	nt Yes:	72%	80%	68%
iuerella	11000112	Υ	Υ	Υ
dorolla	11550112		1	'
derella	11060699	v	٧	٧
		Υ	N	N
derella	11546508			
iderella	11148016	γ	N	Υ
	44440040	Υ	Υ	Υ
derella	10084728			
derena	11040000	N	Υ	Υ
derella	11643566	IN	IN.	ı
derella	11267269	N	N	٧
	r			

=COUNTIF(H4:H28,"Y")/COUNTA(H4:H28)

- COUNTIF says to count if meets criteria
- "Y" says to count the cells filled with
 "Y"
- / is saying to divide that number
- COUNTA says to count all *full* cells
- Giving us 16/25 or 68%
- H4:H28 is a "range" or location of cells



So what did we learn today?

- Filtering
- Randomizing
- Conditional Formatting
- COUNTIF Functions





Thank you!

Feel free to ask any questions or reach out for details... nolanwagner@bethany.org



Turning Data into Action: Improving CQI with Simple Tools



Overview

- Clean, clear data helps us continuously improve
- Tools used: Excel, Power Query, Power BI, Databases, Surveys
- Goal: Show simple, effective ways to turn raw data into action

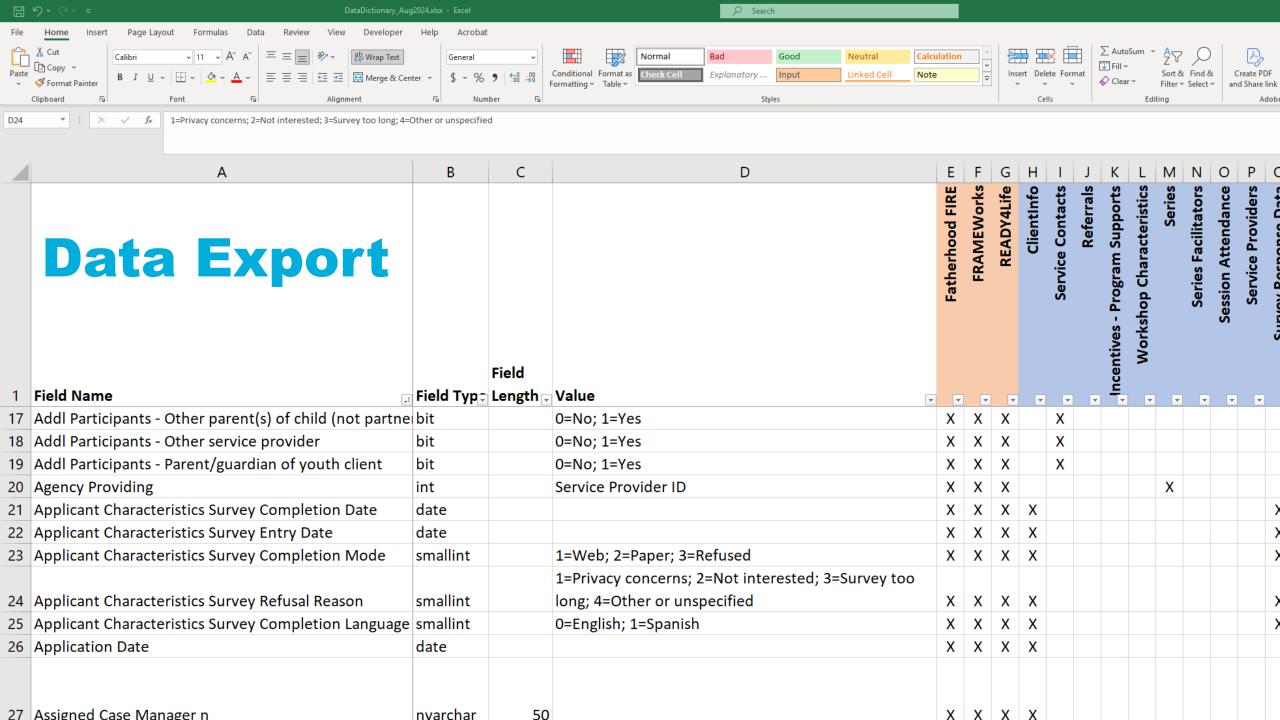


Why Start with a Data Dictionary?

- The Data Dictionary helps us understand what our data means
- It's the key to making sure we're using the right fields correctly

Let's take a quick look.



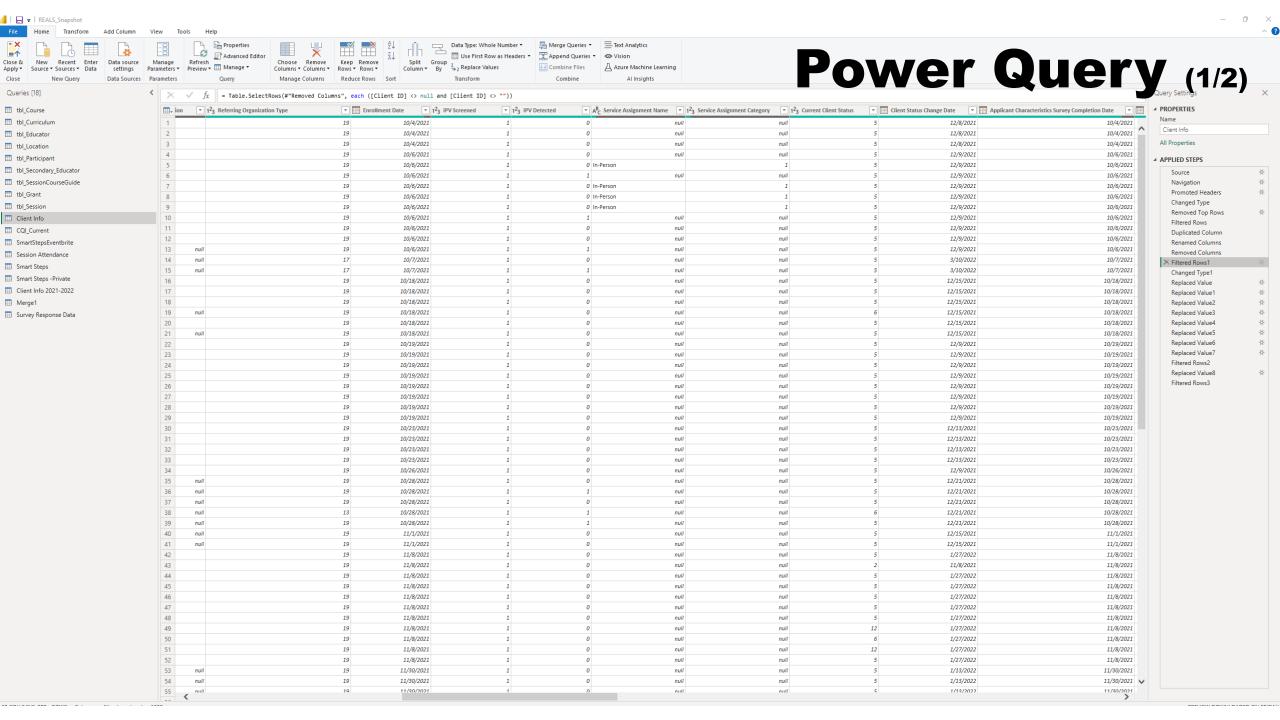


Transforming Data

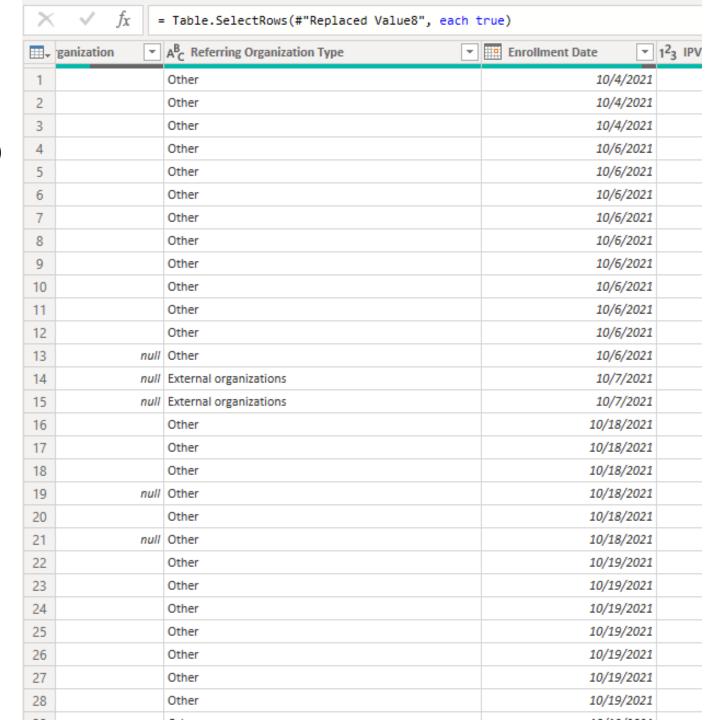
Transforming Data with Power Query

- Import data from your source (Excel/CSV/database).
- Use Power Query to:
 - Remove empty columns/rows
 - Split combined columns
 - Rename fields
- Now the data is readable and ready to visualize.

Power Query is part of Excel and Power BI



Power Query (2/2)



Excel/Power BI – Simple Data Visualization Tools

Connect your cleaned dataset

Create visuals like:

- Bar charts (e.g. Attendance by Location)
- Line graphs (e.g. Trends over time)

Interactive dashboards help explore questions quickly. (This is where Power BI shines)

Dashboards in Action

Live dashboards track:

- Completion rates
- Attendance patterns
- Referral follow-through
- Used in regular CQI meetings to track progress

Dashboards



Lessons Learned

- Clean data leads to smarter decisions
- Simple tools are powerful when used intentionally
- CQI thrives when everyone sees and understands the data

Final Takeaways

- Don't wait for perfect tools—use what you have
- Make the data visible
- Review often, Improve often



Grant recipient panel questions (2/2)

What tips and resources do you recommend for other grant teams who would like to learn more about data analysis?



Let's turn to your questions...



What are your questions for today's presenters?

- / Enter your questions into the chat, or unmute yourself to ask aloud!
- / Please specify if your question is for a particular program or for all presenters





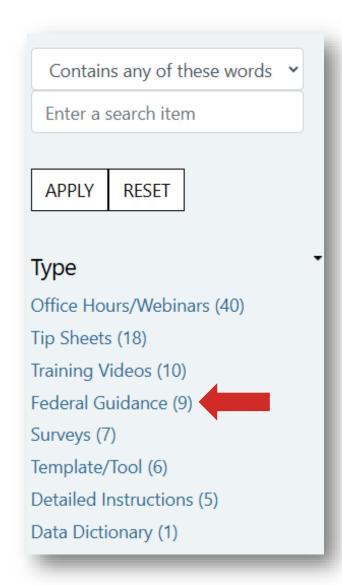


Announcements



New and updated nFORM TA resources now available (1/2)

- / Review updated Data Dictionary, Data Export Template, and Performance Measure Sources Manual on HMRF Grant Resource site
- / Access FEDTalks and other federal guidance on resource site





New and updated nFORM TA resources now available (2/2)

/ New! Monitoring Data Quality tip sheet describes how staff can use nFORM's tools to identify and address potential issues

https://hmrfgrantresources.info/resource/monitoring-data-quality-tips-nform-20-users

/ Updated! Tips for Completing the Progress Narrative and Performance Measures tip sheet now include information from March and April nFORM office hours on focusing responses to progress narrative

https://www.hmrfgrantresources.info/resource/tips-completing-progress-narrative

https://www.hmrfgrantresources.info/resource/using-nform-20-tools-monitor-hmrf-performance-measures



Save the dates for upcoming office hours

- / CQl office hours on Tuesday, June 24 from 2-3pm ET
- / nFORM office hours on Tuesday, July 8 from 2-3pm ET
- / CQI office hours on Tuesday, July 22 from 2-3pm ET

