

STRONG FOUNDATIONS

BUILDING RESILIENT FAMILIES
AND THRIVING YOUTH



A Day in the Life of an HMRF Data Manager

2026 HMRF Conference

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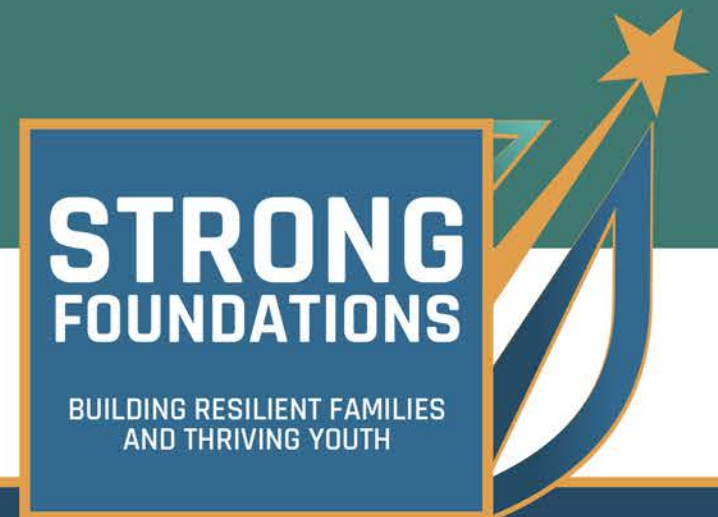
Today's Session



- Data managers: The unsung heroes of program success
- Using data to track a cohort from recruitment and enrollment to program completion
 - Recruitment and enrollment
 - Workshop participation
 - Individual services
 - Exit survey completion
- Wrap up and questions



Data managers: The unsung heroes of program success



Roles and responsibilities of a data manager

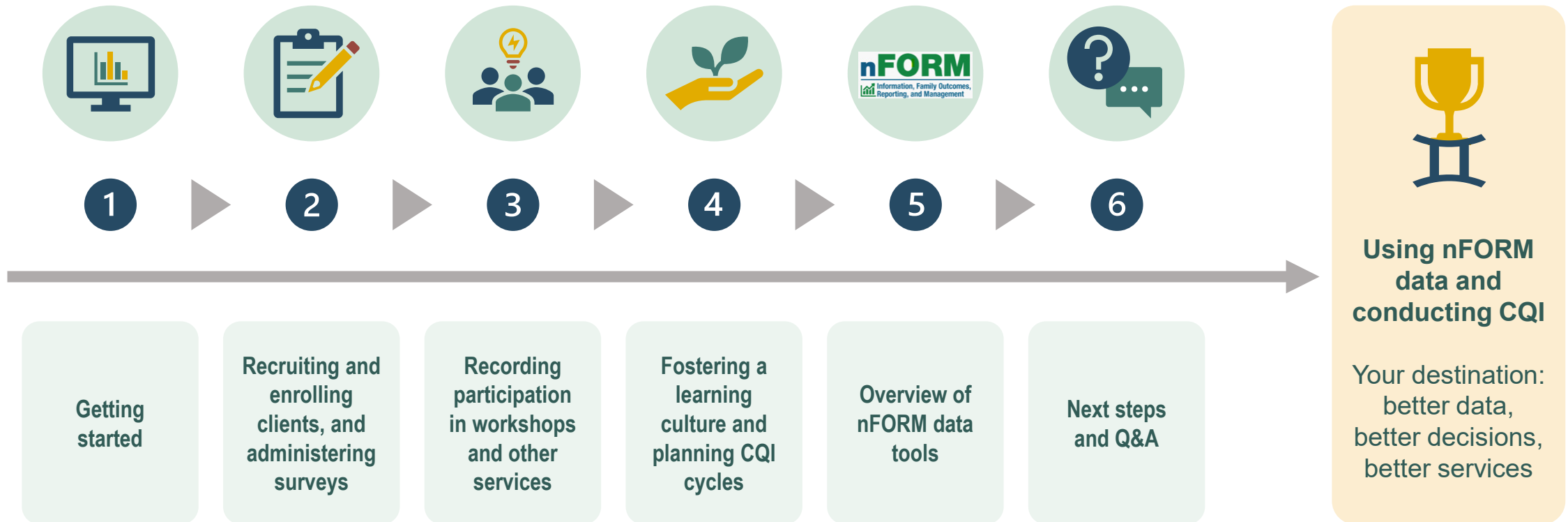


- Develop and implement data capacity and CQI plan to ensure consistent data entry, monitoring, reporting, and protection of clients' personally identifiable information (PII)
- Develop staff proficiency in data collection and using nFORM
- Oversee data collection and monitor for potential data quality issues
- Analyze data to support program operations and identify trends in program delivery, client outcomes, and performance measures
- Support reporting, monitoring, and dissemination activities by providing accurate and timely data in an accessible manner

Well nFORMed training recap



Recordings and slides from each training session, along with Keeping Data Secure training video, available on resource site



nFORM data tools



PPR



Progress on HMRF
performance measures

Query Tool



Visualizations of
aggregate progress on
client measures
Explore by different
factors

**Operational
Reports**



Manage day-to-day
operations and track
performance
Summary and detailed
reports
Export into Excel

Data Export



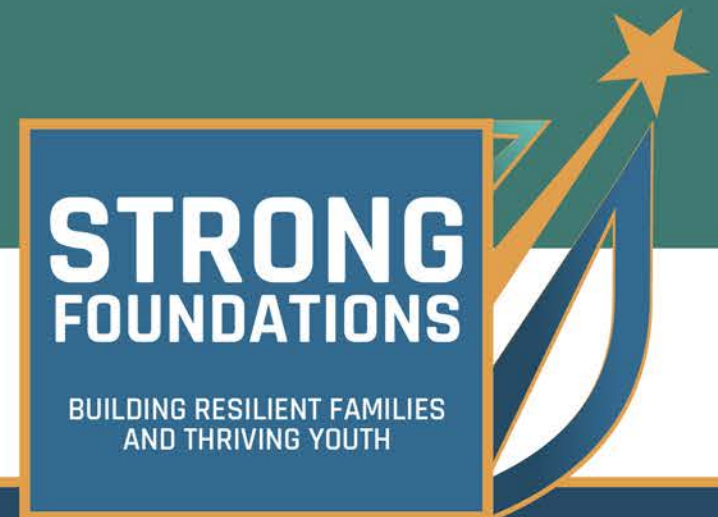
Access all detailed
nFORM data except
for PII
Downloadable Excel
data organized on
separate tabs

Use filters to drill down on a group of clients



- All operational reports and query tool tabs include filters to drill down on the data
- Filter options include population, enrollment date ranges, client characteristics, workshops and series, and other data points
- Export operational reports to Excel to sort and filter data further, and link to other operational reports and the data export
- Print query tool visuals to share with others

Using data to track a cohort from recruitment and enrollment to program completion



Preparing for a new client cohort



- Review the User Account Activity Report to confirm staff accounts are active and have the permissions they need
- Set up workshop session series

The screenshot shows the nFORM system interface. At the top, the nFORM logo is displayed with the tagline "Information, Family Outcomes, Reporting, and Management". To the right of the logo are four icons representing different sections: Clients, Workshops, Service Providers, and Reports. Below these icons is a navigation bar with three tabs: Workshops, Session Series (which is currently selected), and Sessions. The main content area is titled "Session Series" and features a "Filter Criteria" section with two dropdown menus: "Workshop:" and "Delivery Mode:". Both dropdowns currently show "--Select workshop" and "--Select delivery mode" respectively. At the bottom of the page, there is a green button labeled "+ Add Session Series".

Ensure potential clients are enrolled



Monitor recruitment and enrollment

- Use the Outreach Detail Report to monitor potential clients and work with recruitment staff and/or case managers to follow up as needed
- Use the Grant Year Overview and Enrollment tabs in the query tool to monitor enrollment



Monitor survey completion

- Generate the Survey Completion Summary report to identify clients who have not yet submitted an Entrance Survey
- Check individual client profiles as needed for missing information



Verify client status

- Use the Client Status Summary Report to confirm clients' statuses are moving from Outreach or Applicant pending enrollment to Active (i.e. enrolled in nFORM)
- Use report throughout programming to ensure client statuses are being updated as expected to reflect program flow



Assign Case Managers

- Use the Caseload Summary report as needed to review caseloads

Recruitment and enrollment: Run, review, roll out



- Practice generating and reviewing tools for monitoring recruitment and enrollment
- With others at your table, practice using these tools and action plan how you can apply them:
 - How can you use nFORM tools to track and identify potential challenges with recruitment and enrollment?
 - What recruitment and enrollment information will you share with your front-line staff, CQI team, and project leaders?
 - To protect client PII, do not share your reports with other grant teams



Tools/Reports

User Account Activity Report

Outreach Detail Report

Query Tool: GYO and Enrollment tabs

Survey Completion Summary Report

Client Status Summary report

Caseload Summary Report

Use data to monitor workshop details and participation



- 1 Use the Series Session Attendance Report to review attendance after each session**
 - Identify clients who miss a session and connect with facilitators and case managers to schedule makeups
- 2 Run the Primary Workshop Participation Summary and Detail Reports to review progress on primary workshop participation hours targets**
- 3 Ensure staff are sending reminder notifications to clients about upcoming sessions**
 - Generate the Enrolled Clients' Email and Phone Report as needed
- 4 Throughout programming, update session details if needed to reflect any changes to session dates or duration**
- 5 Towards the end of programming, review the GYO (number of workshop sessions pending attendance tile) and Workshop Participation tabs in the query tool and the operational reports to ensure attendance has been fully recorded and that clients met primary workshop participation benchmarks as expected**

Workshops: Run, review, roll out



- Practice generating and reviewing tools for monitoring workshop details and participation
- With others at your table, practice using these tools and action plan how you can apply them:
 - How will you use workshop data to track workshop participation and delivery and identify challenges?
 - What workshop information will you provide to your front-line staff, CQI team, and project leaders?
 - To protect client PII, do not share your reports with other grant teams



Tools/Reports

Series Session Attendance Report

Primary Workshop Participation Summary and Detail Reports

Query Tool: GYO and Workshop Participation tabs

Use data to monitor individual services



- Review the GYO and Individual Services tabs in the query tool to monitor numbers and types of ISCs, referrals, and incentives provided – compare to your grant’s case management plan
 - Identify potential data quality issues, such as whether “other” categories are being used too often
- Explore further using the Individual Service Contacts, Incentives, and Caseload Summary and Detail Reports
 - If needed, use the Individual Service Contacts, Referrals, and Incentives tabs of the data export to explore further

Individual services: Run, review, roll out



- Practice generating and reviewing tools for monitoring individual services
- With others at your table, practice using these tools and action plan how you can apply them:
 - How can you use data on individual services to track case management activities?
 - What information will you provide to your team to help improve delivery of individual services?
 - To protect client PII, do not share your reports with other grant teams



Tools/Reports

Query Tool: GYO and Individual Services tabs

Individual Service Contacts Report

Incentives Report

Caseload Summary Report

Ensure clients complete the exit survey



- Generate bulk passcodes if needed
- Review Survey Completion Summary and Detail Reports and work with staff to identify clients who need to complete exit survey
- Use the Paper Survey Report to make sure responses from paper copies are being entered into nFORM
- Use the Refused Survey Report to identify number of clients refusing and the reasons why

Surveys: run, review, roll out



- Practice generating and reviewing tools for monitoring survey completion
- With others at your table, practice using these tools and action plan how you can apply them
 - How can you use data to track survey completion so that you can monitor client outcomes?
 - What survey information will you provide to your team?
 - To protect client PII, do not share your reports with other grant teams



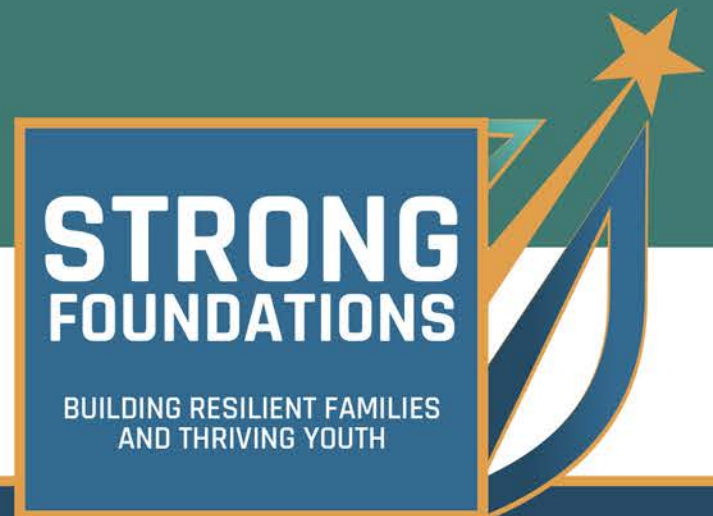
Tools/Reports

Survey Completion Summary Report

Paper Survey Report

Refused Survey Report

Advancing data capacity and CQI



Check out the HMRF Grant Resource site!



- Various resources available from detailed manuals, training videos, tip sheets and tools, and templates
 - Access recordings and slides from Well nFORMed trainings
- Search by keyword, type, or topic
- Check out the HMRF Weekly Digest email for details about new and updated resources and other nFORM and CQI information

The screenshot shows the HMRF Grant Resource site. At the top, there's a header with the HMRF logo (Healthy Marriage & Responsible Fatherhood) and navigation links for "nFORM/CQI RESOURCES" and "INTERACTIVE SNAPSHOTS". Below the header, the "nFORM" logo is displayed, followed by the text "nFORM and CQI Resources". The main content area includes a paragraph about the page's purpose, contact information for technical assistance, and a note about additional resources. To the right, there's a circular diagram illustrating the CQI process: 1. Identify an area to improve and set a goal, 2. Identify an improvement strategy, 3. Conduct a road test and assess implementation, 4. Monitor outcomes, and 5. Communicate and act on results. Below this, there's a "Quick Links" section with three categories: "Detailed Instructions and Tools" (listing a template, manual, planning tool, and privacy PDF), "Data Dictionary (coming soon)" (listing a record layout document), and "Training Videos" (listing an introductory video and a best practices video).

<https://www.hmrfgrantresources.info/>

Join us for office hours



- Register for biweekly data capacity and CQI office hours
 - Upcoming sessions on August 18 and August 25 from 2-3pm Eastern time
 - Starting in September, sessions will be on the 2nd and 4th Tuesday of each month from 2-3pm Eastern time
 - Links included in weekly HMRF Weekly Digest emails
- Sessions include tutorials, peer learning, and opportunities to ask questions in real time
- All nFORM users and CQI staff encouraged to attend!

Reach out to the data capacity and CQI TTA team with any questions at
nFORMCQITA@mathematica-mpr.com