

Deep Dive on Client Participation

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OFFICE OF FAMILY ASSISTANCE

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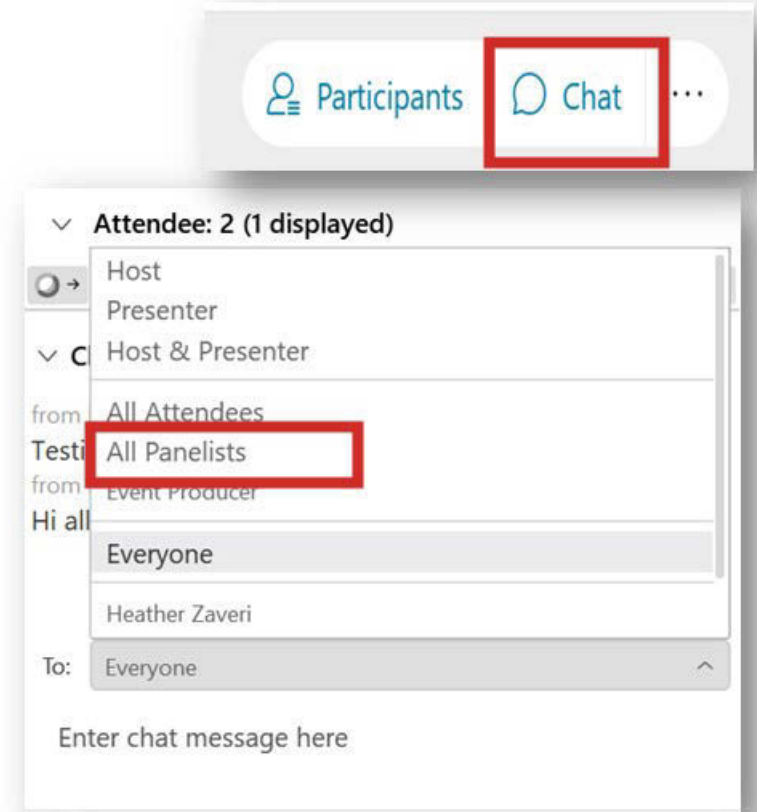


Housekeeping

/ Use the chat to ask questions

- Select “All Panelists” to submit questions

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



Reminders:

- / **Never text or email personally identifiable information such as client names—including to the help desk**
 - Only refer to clients in emails by their client ID number
- / **Never take screenshots of client personally identifiable information from nFORM**
- / **Everyone who interacts with client data should:**
 1. Watch the [Keeping Data Secure](#) training video on the [help page](#)
 2. Review [the Performance Measures and Data Collection Logistics Manual](#) on the [help page](#) for more information on keeping data secure

Deep Dive on Client Participation

Today's agenda

/ **Participation in individual service contacts**

- New operational report!

/ **Participation in primary workshops**

- Targets for primary workshop hours
- Participation benchmarks
- nFORM data tools and reports
- Reporting participation in primary workshops to ACF

/ **Analyzing participation using nFORM data tools and reports**

/ **Tips for analyzing participation data**

/ **Your questions**

Participation in individual service contacts

Individual service contacts (ISCs)

/ Grantees must record all individual services provided to clients in nFORM

- ISCs, referrals, incentives, and program supports

/ Fatherhood FIRE projects must provide eight substantive ISCs per client as part of their approach to addressing client needs

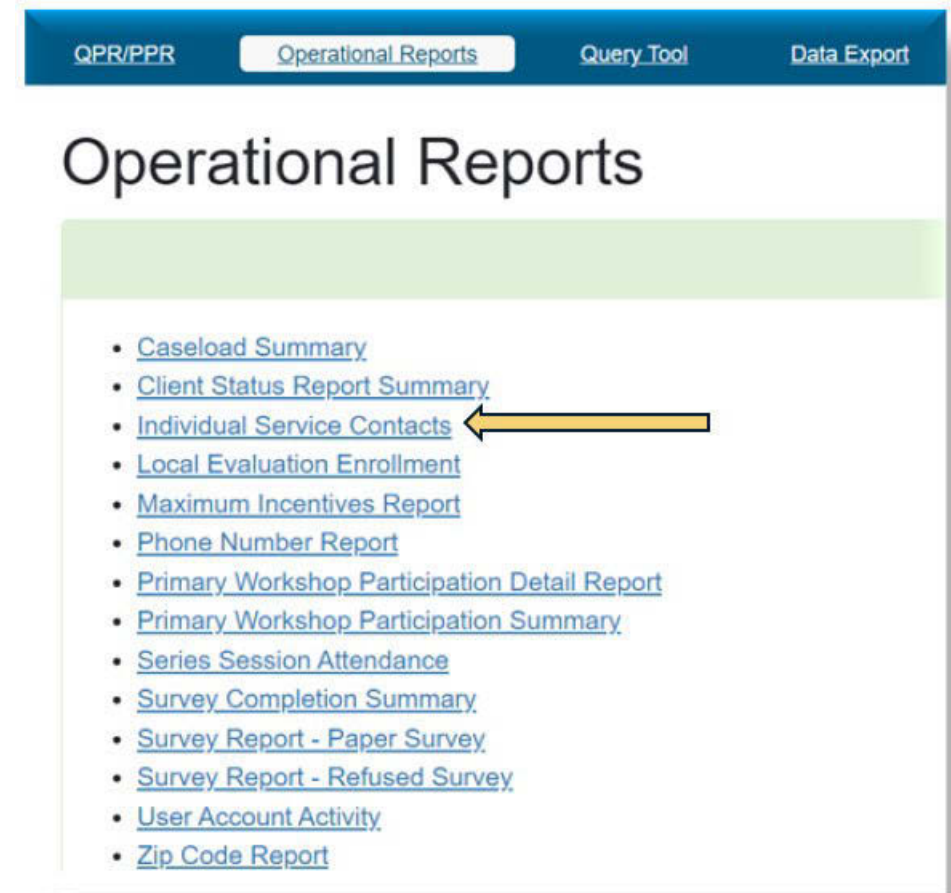
Substantive ISCs

- / **ACF defines substantive ISCs as direct contacts with a client lasting 15 minutes or longer, and which cover client issues and needs beyond just reminder contacts**
- / **See the [October 2021 OFA FED Talk](#) for more information**



New operational report in nFORM for substantive ISCs

- / Includes aggregate and client-level information on total number of substantive and reminder-only ISCs
- / Enter client enrollment date range to run the report
- / Export the report to Excel for more analyses



Grantee 1 HM (LE) Individual Service Contacts – Summary Report (Example)

Grantee 1 HM (LE)
Individual Service Contacts - Summary Report*
Clients Enrolled 1/1/2020 - 12/8/2021

Grantee	Client Grantee Location	Population	Number of Clients/Couples	Average Number of Substantive Service Contacts@	Average Number of Reminder Only Service Contacts
Grantee 1 HM (LE)	All	All	37	6	8
		Adult couple	10	6	8
		Adult individual	27	6	8
	Not specified	All	25	5	8
		Adult couple	10	5	8
		Adult individual	15	5	8
	Main Street	All	12	6	8
		Adult individual	12	6	8

*This report does not include clients with a client status of "Consent revoked," clients with a "Control (NO Services Provided)" or "Control Waitlist (NO Services Provided)" service assignment, or clients with a case status of "Non program." In addition, couples where only one client is enrolled are excluded from this report.

@Substantive individual service contacts are service contacts that (1) last 15 minutes or longer, (2) result in direct contact with the client, and (3) cover client issues and needs beyond just reminder contacts.

12/8/2021 10:14:19 AM

Cloud Grantee 3 RF (LE) Service Contacts – Detail Report (Example)

Cloud Grantee 3 RF (LE) Individual Service Contacts - Detail Report*
 Clients Enrolled 4/1/2021 - 12/2/2021

Client ID	Client Grantee Location	Population	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
10026919	Eastside	Community couple	32573	Days	Sunny	Active	10/5/2021	Hannah McInerney	11/30/2021	6	4
10026922	Eastside	Community couple	32573	Days	Rainy	Active	10/5/2021	Hannah McInerney	11/15/2021	6	4
10026896	Northside	Community individual		Stripes	Tiger	Active	10/5/2021	Mathew Stange	10/26/2021	8	8
10022450	Northside	Community individual		Lightyear	Buzz	Active	4/22/2021	Mathew Stange	9/22/2021	8	6
10026906	Southside	Reentering individual		Doll	Woody	Active	10/5/2021	Mathew Stange	8/10/2021	5	3
10067509	Southside	Reentering individual		Dog	Slinky	Active	11/26/2021	Mathew Stange	8/27/2021	4	1

Questions?

Participation in Primary Workshops

Workshops are curriculum-based services

Primary workshops

- Curriculum-based workshops that all participants are expected to attend and ultimately complete

Optional workshops

- Curriculum-based services that the program offers but are not considered a core part of programming

W2. Add/Edit Workshop

* Indicates required field(s)

Program FRAMEWorks

* Population Adult individual

* Workshop Name Parents 101

Description

Workshop Details

* Registration Required Yes No

* Enrollment Cohort

* Total Hours to be Offered 24

* Activities

(Check all that apply)

- Divorce reduction
- Marriage and relationship education/skills (MRES)
- Marriage enhancement
- Marriage mentoring
- Pre-marital education
- Reduction of disincentives to marriage

* Elements

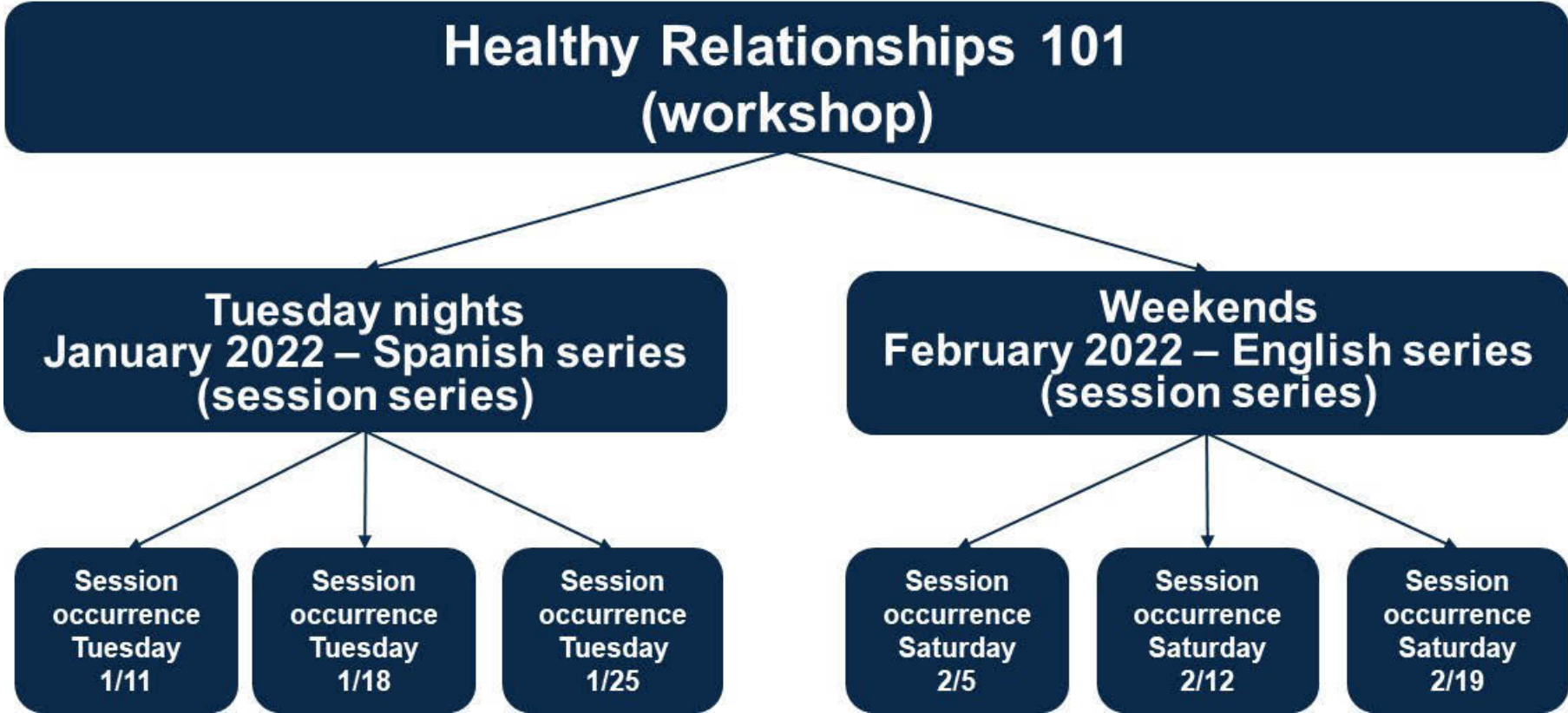
(Check all that apply)

- Financial management
- Job and career advancement
- Parenting skills
- None of the above

* Type Primary Optional Not in Use

* Structure Single Blended Linked Non-curricularized

Hierarchy of workshops, session series, and session occurrences



Targets for primary workshop hours



- / **Targets are the total hours of primary workshops that clients are expected to attend**
- / **Funding Opportunity Announcements (FOAs) specify that FRAMEWorks and READY4Life targets should be at least 12 hours, and Fatherhood FIRE targets at least 24 hours**
- / **In nFORM, see how clients are progressing toward the target hours and average participation of those who attend**
- / **Hours count across all primary workshop sessions that clients attend, including different session series and make-up sessions**

Primary workshop participation benchmarks

Initial attendees

- The number of clients who attend at least one primary workshop session

Halfway attendees

- The number of clients who attend at least 50 percent of the target hours for primary workshops

Completed clients

- The number of clients who attend at least 90 percent of the target hours for primary workshops

Fully finished clients

- The number of clients who attend 100 percent or more of the target hours for primary workshops

nFORM data tools and reports to view and analyze participation in primary workshops (1)

- **Quarterly progress reports (QPRs) and semiannual performance progress reports (PPRs)**
 - Primary workshop tables are being updated to “look back” and measure clients’ participation in the current grant year only against current targets, even if clients enrolled and participated in prior years
 - Clients are counted toward each participation benchmark in the year in which they achieve that benchmark, even if they participate and achieve benchmarks across multiple grant years
 - Updates to be available for QPR due January 30, 2022
- **Operational reports**
 - Primary workshop participation operational report compares clients’ cumulative participation across years to current year targets; grantees use with data export to analyze who reaches benchmarks and when

nFORM data tools and reports to view and analyze participation in primary workshops (2)

- **Client profiles**

- Compares a client's cumulative participation to current primary workshop hours target

- **Query tool**

- Workshop Participation – Primary Workshops tab compares clients' cumulative participation to current year targets only

- **Data export**

- Includes all participation data for doing custom analyses

Performance reporting for HMRF grants



- / **Grantees submit quarterly reports**
 - QPR = quarterly progress report (Months 3 and 9)
 - PPR = semiannual performance progress report (Months 6 and 12)
- / **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**

Reporting changes for 2020 grantee cohort

- / The QPRs and PPRs no longer include a two-month lag from date of enrollment for reporting participation**
- / Participation in primary workshops will include all clients who participated in the grant year, regardless of when they enrolled**

PPR Section C-04.2.b Table 1

2b. Primary Workshop Participation

The tables in this section report participation in all session series, both series that are completed and series that are still in progress, where attendance has been fully recorded.

Table 1 compares clients' cumulative participation across grant years to current target hours, by year of enrollment.

This shows whether clients, on average, are receiving the intended number of primary workshop hours over time.

Table 1: Cumulative participation in primary workshop hours through end of reporting period

	Target hours (current grant year)	Average hours	Average %
Adult individuals			
Grant year 5— Participation in primary workshop hours for clients enrolled in grant year 5	20	5.0	25.0%
Grant year 4— Participation in primary workshop hours for clients enrolled in grant year 4	20	15.0	75.0%
Grant year 3— Participation in primary workshop hours for clients enrolled in grant year 3	20	18.0	90.0%
Grant year 2— Participation in primary workshop hours for clients enrolled in grant year 2	20	16.5	82.5%
Grant year 1— Participation in primary workshop hours for clients enrolled in grant year 1	20	14.5	72.5%

NOTE: Table 1 includes clients/couples enrolled from start of grant year 1 through reporting period end date who have attended at least one primary workshop session.

PPR Section C-04.2.b Table 2

Table 2 identifies how many clients are reaching each of the participation benchmarks based on their participation in the current grant year, and the year in which those clients enrolled.

This shows the extent to which grantees are getting the intended number of clients to participate in and complete primary workshops in the current grant year.

Table 2: Achievement of participation benchmarks during reporting period

Adult individuals	Count of clients achieving benchmark						Target count of clients for benchmark (TGT)	Percent of target met (PCT=TC/TGT)
	Clients enrolled in grant year 1 (GY1)	Clients enrolled in grant year 2 (GY2)	Clients enrolled in grant year 3 (GY3)	Clients enrolled in grant year 4 (GY4)	Clients enrolled in grant year 5 (GY5)	Total clients (TC=sum of all GYs)		
Benchmarks for participation in primary workshops (BP)								
Initial attendees: Attended at least one primary workshop session	0	0	5	10	175	190	200	95.0%
Halfway attendees: Attended at least 50% of primary workshop hours	1	0	4	12	152	169	180	93.9%
Completed clients: Attended at least 90% of primary workshop hours	0	8	6	20	115	149	160	93.1%
Fully finished clients: Attended at least 100% of primary workshop hours	0	2	0	16	120	138	150	92.0%

NOTE: Table 2 includes clients/couples enrolled from start of grant year 1 through reporting period end date who have achieved at least one benchmark during the selected reporting period; only clients in populations with participation benchmark targets in the selected reporting period are included. Enrollment numbers for the current grant year may be found in [QPR or PPR] Section [B-01 or C-03]. For other grant years, refer to past QPRs/PPRs or the enrollment tab of the query tool.

Questions?

Analyzing Participation

Ways to measure participation (1)

/ **Initial participation in any service and at least one workshop session (PPR section C-04.1)**

- Enables you to see how quickly clients are engaging in services after enrolling in the program

/ **Average number of substantive ISCs (Individual Service Contacts operational report)**

- Enables you to see if clients are receiving the planned level of case management
- PPR section C-04.3 being updated for PPR submitted April 30, 2022

Ways to measure participation (2)

/ Attendance at individual workshops in completed session series (PPR section C-04.2.a)

- Enables you to look at each workshop and what workshops are better attended

/ Primary workshop hours and participation benchmarks (PPR section C-04.2.b)

- Includes all workshop participation, regardless of whether the series is completed
- Enables you to look at the client level and see how they are progressing toward participation benchmarks

Focus on 90 percent completion benchmark (PPR section C-04.2.b)

- / ACF defines completed clients as those who attend at least 90 percent of target primary workshop hours**
- / This acknowledges that many clients might miss a workshop session because of scheduling conflicts, illness, childcare, or other barriers, but are otherwise receiving most of the intended content**

Measuring completion

- / The structure of your primary workshops might make it difficult for clients to achieve the 90 percent completion benchmark**
 - The fewer the sessions offered in a series, the harder it is for clients to achieve the 90 percent benchmark
- / If primary workshop hours are provided in fewer than 10 sessions, a client must attend all sessions to complete at least 90 percent of target hours**
 - For example, a FIRE grantee offers 24 hours of content in 8 3-hour sessions. If a client attends 7 of 8 sessions, they have only completed 21 of the 24 primary workshop hours, or 87.5 percent.
 - Or, a FRAMEWorks grantee offers 12 hours of content in 6 consecutive Saturday afternoons. If a client attends 5 of the 6 afternoon sessions, then they have only completed 83.3 percent of the target hours.

Reporting participation in your progress narrative

/ If your workshop structure might make it difficult for clients to participate in 90 percent of target hours, provide more information in the quarterly progress narrative

- Review PPR C-04.2.a to see which completed primary workshops have attendance issues among the workshops that have fewer than 10 sessions
- Where needed, analyze attendance data from the operational reports or the data export to find out how many clients attended all but one of the expected sessions
- Look at how many sessions clients attended and report that story in your progress narrative
- Remember, session series reported in PPR C-04.2b might still be in progress, so report the full picture of participation and note whether clients are part of ongoing session series

Examining primary workshop participation

Identify the total number of clients who attended all but one session in a series by reviewing the total number of sessions that clients attended and made up

Use the series session attendance report if clients typically attend only one workshop series

- By exporting the report to Excel, you can drill down on the data
- Make sure to only review data for completed session series
- For each client, add attended + made up sessions to calculate attendance based on number of sessions offered
- Describe findings in progress narrative of quarterly report

Examining primary workshop participation

Client ID	Client Grantee Location	Registration Date	Disenrollment Date	Number of Sessions *		
				Attended	Missed	Made up
10022117	Eastside			5	0	1
10022353	Northside	8/28/2021		8	0	0
10022379	Eastside	8/28/2021		8	0	0
10022861	Northside	8/28/2021		7	1	0
10022874	Northside	8/28/2021		6	1	1
10023006	Westside	8/28/2021		6	2	0
10025224	Eastside	8/28/2021		6	2	0
10025910	Southside	8/28/2021		4	3	1
10026016	Southside	8/28/2021		3	3	2

Examining primary workshop participation

Use the session attendance tab of the data export if clients typically attend multiple session series both within or across primary workshops

- First, you can identify the number of sessions that each client attends
- Then, by using an Excel pivot table, you can identify the total number of clients who attended all but one of the expected sessions by reviewing the total number of sessions that clients attended and made up

Analysis steps:

1. In a copy of the data export file, create a new variable on the session attendance tab in-between “Makeup date” and “Most recent Registration Date” to indicate whether or not a client participated in a workshop session.
2. Next, enter the following formula and copy down for all rows:

```
=IF(AND(OR(X2=0,ISBLANK(X2)),ISBLANK(Y2),ISBLANK(Z2)), 0, 1)
```

Here 0 indicates “no, the client did not attend” and 1 indicates “yes, the client did attend”

TIP: Make sure the data are formatted as numbers instead of text

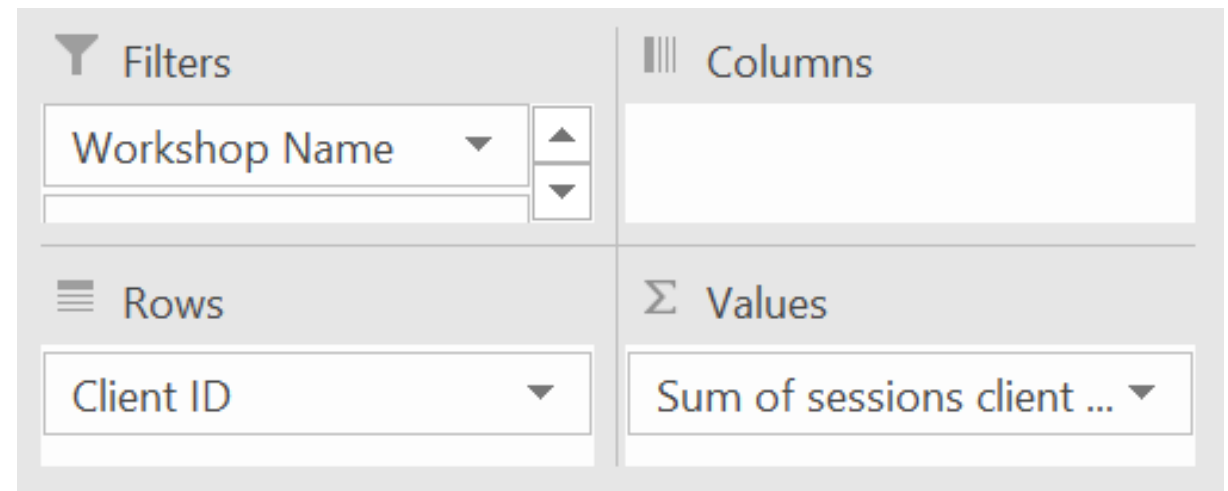
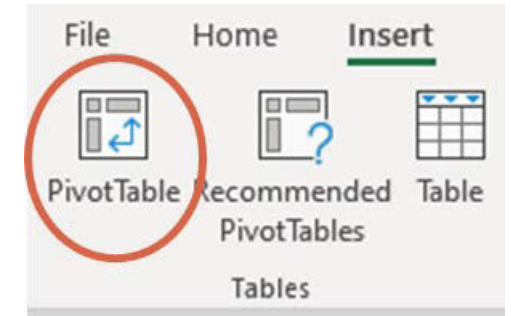
Examining primary workshop participation

Analysis steps (continued):

3. Insert a pivot table using the session attendance data
4. Add Workshop Name and Series Name that end within the reporting period to the filters field

Add Client ID to the rows field

Add the new variable to the values field. Make sure to display the sum of the number of sessions clients attended.



Examining primary workshop participation

Workshop Name	Nurturing Fathers	Client ID	Sum of Did client participate in session?
Session Series Name	(Multiple Items)	10022353	8
		10022379	8
Client ID	Sum of Did client participate in session?	10022434	8
10022117	3	10022861	8
10022353	8	10022874	8
10022379	8	10022997	8
10022434	8	10023006	8
10022489	1	10025800	8
10022861	8	10025839	8
10022874	8	10025910	8
10022997	8	10026207	8
10023006	8	10025224	7
10024283	5	10024283	5
10025224	7	10025237	5
10025237	5	10026197	5
10025758	3	10022117	3
10025800	8	10025758	3
10025839	8	10026016	3
10025910	8	10022489	1
10026016	3	10026184	1
10026184	1		
10026197	5		
10026207	8		

Analysis Steps (continued)

- Filter the workshop and series names to only include primary workshops that ended in the current reporting period.
- Copy and paste the pivot table to sort on the number of sessions that each client has attended. Then you can identify the total number of clients that have attended all, all but one, or fewer than the expected workshop sessions.

Examining primary workshop participation

Example QPR/PPR "Program Participation Performance Measures" Progress Narrative Text:

“Our Nurturing Fathers workshop offers 8 3-hour sessions in a series. Of the completed series in this workshop, 11 of 20 clients attended all 8 sessions and 1 client attended 7 of the 8 sessions. The remaining 8 clients attended fewer than 7 sessions. We are investigating whether these clients started the program late and will continue the workshop in another series, or whether they dropped out of the program.”

Questions?

Take your analysis one step further for CQI!

Pull in additional data to better understand or address low participation

Case manager or facilitator

Survey completion or refusals

Number of service contacts

CQI analysis: expanding series session attendance report

/ Steps to merge case manager into series session attendance report:

1. Download the Caseload Summary operational report and save to your computer.
 - Insert client ID into the first column
2. Add a new column to the series session attendance report and label the column “Case manager”.
3. Insert a vlookup formula in the new column. Use client ID as the identifier to merge assigned case manager.

Example Case Manager VLookup formula: =VLOOKUP(A5,*file path[file name]*Sheet2!\$A:\$O,3,FALSE)

CQI analysis: expanding series session attendance report

Client ID	Client Grantee Location	Case Manager	Registration Date
10022117	Eastside	Peppermint Patty	
10022353	Northside	Charlie Brown	8/28/2021
10022379	Eastside	Charlie Brown	8/28/2021
10022861	Northside	Pig Pen	8/28/2021
10022874	Northside	Pig Pen	8/28/2021
10023006	Westside	Sally Brown	8/28/2021
10025224	Eastside	Peppermint Patty	8/28/2021
10025910	Southside	Linus Pelt	8/28/2021
10026016	Southside	Linus Pelt	8/28/2021

Case managers can follow up with their clients to encourage participating in workshops!

Questions?

Monitoring substantive ISCs and workshop participation

- / **Combine the new service contact report with other data to monitor client-level participation in individual and group services**
- / **For example, use client ID to pull in workshop participation data from the data export and/or the primary workshop participation detailed operational report**
- / **Example data points include:**
 - ✓ Number of workshop sessions attended
 - ✓ Number of primary workshop hours attended
 - ✓ Target hours for client's population type

Monitoring substantive ISCs and workshop participation

/ Steps to merge workshop participation data into the ISC operational report:

1. Download the detailed tab of the ISC report
2. Add three new columns to the right of the existing data
3. Depending on prior participation data analysis, you can download the primary workshop participation detailed operational report, series session attendance report and/or data export and save to your computer.

Total Number of Reminder Only Service Contacts	Number of sessions clients participated in	Participation in Primary Workshop(s) Hours	Target for Participation in Primary Workshop(s) Hours
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Monitoring substantive ISCs and workshop participation

4. Insert a vlookup formula in the new columns. Use client ID as the identifier to merge participation data.

Example vlookup formulas:

Number of sessions client participated in (data export):

=VLOOKUP(A4,'*file path*[*file name*]Attendance Pivot!\$A:\$B,2,FALSE)

Participation in primary workshop(s) hours (primary workshop participation detailed report):

=VLOOKUP(A4,'*file path*[*file name*]RPT_DosageOperationalReportData!\$A:\$N,12,FALSE)

Target for participation in primary workshop(s) hours (primary workshop participation detailed report):

=VLOOKUP(A4,'*file path*[*file name*]RPT_DosageOperationalReportData!\$A:\$N,13,FALSE)

Insert Client ID into the first column when using vlookup formulas with the primary workshop participation detailed report

Monitoring individual and group participation

Cloud Grantee 3 RF (LE) Individual Service Contacts - Detail Report*
 Clients Enrolled 4/1/2021 - 12/2/2021

Client ID	Population	Client's Case Manager(s)	Most Recent Substantive Service Contact Date	Total Number of Substantive Service Contacts@	Total Number of Reminder Only Service Contacts	Number of sessions clients participated in	Participation in Primary Workshop(s) Hours	Target for Participation in Primary Workshop(s) Hours
10026919	Community couple	Hannah McInerney	11/30/2021	6	4	7	21	24
10026922	Community couple	Hannah McInerney	11/15/2021	6	4	7	21	24
10026896	Community individual	Mathew Stange	10/26/2021	8	8	8	24	24
10022450	Community individual	Mathew Stange	9/22/2021	8	6	4	12	24
10026906	Community individual	Mathew Stange	8/10/2021	5	3	1	3	24
10067509	Community individual	Mathew Stange	8/27/2021	4	1	#N/A	0	24

Tips for data monitoring and analysis (1)

- / Consider which data tools and reports will best answer your questions or meet your needs**
- / Remember that the data in the reports will reflect the time you run the reports and the other parameters that you select, such as enrollment dates or workshops and series**
- / Use client and couple ID, workshop ID, series ID, and session ID to link data across multiple data sources**

Tips for data monitoring and analysis (2)

- / Remember that both members of a couple must have attended or made up the exact same session for it to count for couples' participation**
 - Targets are set for couple units for enrollment and participation
- / Remember that participation in workshops is measured across all sessions a client attends; clients may attend in more than one series, so you will need to add up all their attendance in your analyses**
- / For registration required workshops, all attendance must be recorded for the attendance in the session to count**
- / Use Section F of the data collection plan template to detail how you will use nFORM to monitor data, support CQI, and report to stakeholders**

Tips for data monitoring and analysis (3)

/ **Follow best practices to keep data secure**

- Most of the operational reports include client names, which is personally identifiable information
- If you open the operational report in Excel, delete the client names if they are not needed
- Check out the training video titled “Keeping Data Secure” and Appendix A in the Performance Measures and Data Collection Logistics Manual on the nFORM help page for more information on protecting personally identifiable information

/ **Consult with your data manager or other data analysts to identify which analytic methods and software (such as Excel, SPSS, or Stata) best meet your analysis needs**

/ **Contact the nFORM help desk (nform2helpdesk@mathematica-mpr.com) with questions!**

What are your tips?

What are some other recommendations, tips, or considerations you have for monitoring participation data with nFORM?

Add your thoughts or suggestions to the chat!

Questions?