

# Using nFORM 2.0 Data to Monitor Primary Workshop Completion

March 14, 2023  
nFORM 2.0 Team  
Mathematica

**OFFICE OF FAMILY ASSISTANCE**

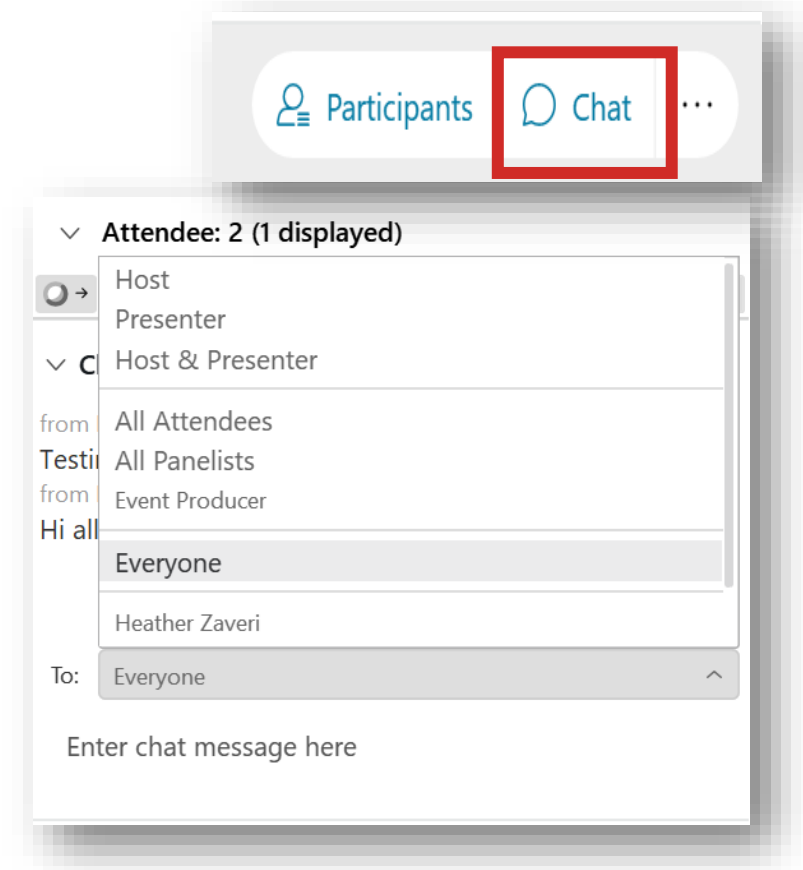
An Office of the Administration for Children & Families





# 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 help page
  2. Review the Performance Measures and Data Collection Logistics Manual on the help page for more information on keeping data secure



# Today's topics

- / Overview of primary and optional workshops**
- / Tips for monitoring workshop participation**
- / Bethany Christian Services of Georgia, LLC:  
Approach to monitoring primary workshop completion**
- / Using nFORM 2.0 data tools to identify clients who stop participating**
- / nFORM enhancements and resources**



# Overview of primary and optional workshops



# Types of workshops

## Primary

- Curriculum-based workshops that all clients are expected to attend and ultimately complete
- Must (collectively, in the case of multiple workshops) address all HMRF grant requirements

## Optional

- Clients can choose to participate but are not required to
- May or may not be curriculum-based



# Primary workshop hours targets



- / Targets are the total hours of primary workshops that clients are expected to attend**
- / FRAMEWorks and READY4Life targets should be at least 12 hours, and Fatherhood FIRE targets at least 24 hours**
- / Hours count across all primary workshop sessions that clients attend, including different session series and make-up sessions**



# Primary workshop participation targets

## 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 at least 100 percent of the target hours for primary workshops





# Monitor current targets and set new ones

- / Use nFORM 2.0 data tools to monitor progress toward grant year 3 targets and identify grant year 4 targets for your continuing application**
- / Grantees serving more than one population must provide targets for each population they serve**
- / Review with your FPS any plans to modify programming that would affect targets for enrollment, primary workshop hours, or participation targets for your client population(s)**



# Include targets and number of nFORM user accounts in continuing applications

## Example

Population	Grant year 4 enrollment and participation targets					
	Enrollment	Initial attendees	Halfway attendees	Completed clients	Fully finished clients	Primary workshop hours
Adult individuals	200	190	180	170	165	16
Adult couples	100	90	85	80	80	12
nFORM User Accounts	10					



# Tips for monitoring workshop participation



# nFORM data tools for monitoring workshop participation

	QPR/PPR		Query Tool		Operational Reports		Data Export	
	Primary	Optional	Primary	Optional	Primary	Optional	Primary	Optional
<b>Session attendance</b>	√	√	√	√	√	√	√	√
<b>Progress toward PWP hours targets</b>	√	n/a	√	n/a	√	n/a	n/a	n/a
<b>Progress toward PWP benchmarks</b>	√	n/a	√	n/a	n/a	n/a	n/a	n/a



# Monitor workshop participation in the QPR/PPR

- / PPR C-04.1 shows how quickly after enrollment clients participated in their first workshop session series occurrence**
- / PPR C-04.2a reports on workshop attendance and retention for each primary and optional workshop offered**
- / PPR C-04.2b shows progress to date toward grant year targets for primary workshop hours (Table 1) and benchmarks (Table 2)**
  - Review in conjunction with Section C-03 which shows progress towards enrollment targets
- / A new tip sheet describes in detail how workshop participation is reported, to help you review progress toward your annual targets**



# Reviewing Workshop Participation in the QPR/PPR: Tip Sheet

## nFORM 2.0 **Reviewing Workshop Participation in the QPR/PPR: Tip Sheet**

Information, Family Outcomes, Reporting, and Management

Healthy Marriage and Responsible Fatherhood (HMRF) clients will not be able to benefit from grant programming if they do not participate in it. Therefore, the Administration for Children and Families (ACF) has developed performance measures to help HMRF grantees monitor and improve clients' participation in workshops. Sections B-02 of the quarterly progress report (QPR) and C-04.1-2 of the semiannual program progress report (PPR) are designed to help grantees track client participation in primary and optional workshops. Templates of each report are available on the HMRF Grantee Resources site ([HM versions](#) and [RF versions](#)). This tip sheet describes how workshop participation is reported, using references to PPR sections. It explores how grantees can review their progress toward the annual targets they set for ACF's primary workshop participation (PWP) measures.

Grantees should consider the timing of each QPR and PPR relative to their programming to determine whether they are on track to meet their PWP targets and other participation goals by the end of the grant year, or whether they need additional strategies to improve client participation.

### Initial participation (PPR Section C-04.1)

This section of the PPR is designed to help grantees monitor when clients typically participated in programming after enrollment. Grantees can use this to determine whether clients' initial participation in program services aligns with their service delivery plans.

In Section C-04.1 (see box at right), grantees can monitor how quickly clients who enrolled in the current grant year participated in a program service (either a workshop or individual service contact [ISC]). The lower half of the table focuses on when clients participated in an initial workshop session after enrollment. (The QPR presents only the workshop session portion of this table.)

This table considers client receipt of any type of ISC (including reminder-only, substantive, or other) and participation in any type of workshop (primary or optional).<sup>1</sup> It includes a set of columns for each population a grantee enrolls and serves in the grant year, regardless of whether it has participation goals for that population. The denominator is

1. Initial Participation		
	Adult couples	
	#	% <sup>a</sup>
<i>Participated in their first program service (workshop session series occurrence or individual service contact) during the time period shown</i>		
<i>Within 1 week of program enrollment</i>	2	1.7%
<i>Between 2 and 4 weeks of program enrollment</i>	94	80.3%
<i>Between 1 and 2 months of program enrollment</i>	1	0.9%
<i>More than 2 months since program enrollment</i>	0	0%
<i>Not yet participated in a service</i>	20	17.1%
<i>Participated in their first workshop session series occurrence during the time period shown</i>		
<i>Within 1 week of program enrollment</i>	2	1.7%
<i>Between 2 and 4 weeks of program enrollment</i>	94	80.3%

New tip sheet available on the HMRF Grantee Resources site:  
<https://www.hmrfgrantresources.info/resource/reviewing-workshop-participation-qprppr-tip-sheet>



# Using operational reports to monitor workshops

## Series Session Attendance Report

- Review clients' attendance by session series
- Can review primary and optional workshop series
- Includes couple ID for applicable clients

## Primary Workshop Participation Summary Report

- Review counts of clients by population type and across grantee locations
- Provides clients' average participation in primary workshops compared to PWP hours target

## Primary Workshop Participation Detail Report

- Review each client's progress toward primary workshop hours target
- Includes couple ID for applicable clients



# Tips for monitoring and analysis

- / Remember that the data in nFORM data tools reflect when you run them and the filters selected, such as enrollment and session series dates**
- / For grantees serving couples, remember that both partners in a couple must either attend a session or a makeup together for their attendance to count towards participation targets**
- / Use client ID, couple ID, workshop ID, series ID, and session ID to link data across multiple data sources**
- / Don't forget to keep data secure!**
  - Delete client names from operational reports when not needed





# **Bethany Christian Services of Georgia, LLC: Approach to monitoring primary workshop completion by month**



# Carla Smith: Quality Assurance Specialist for Bethany Christian Services of Georgia



**Overview of Bethany Christian Services of Georgia's READY4Life program**



**Description of Bethany Christian Services of Georgia's program monitoring needs**



**Bethany Christian Services of Georgia's process for reviewing primary workshop completion data by month**





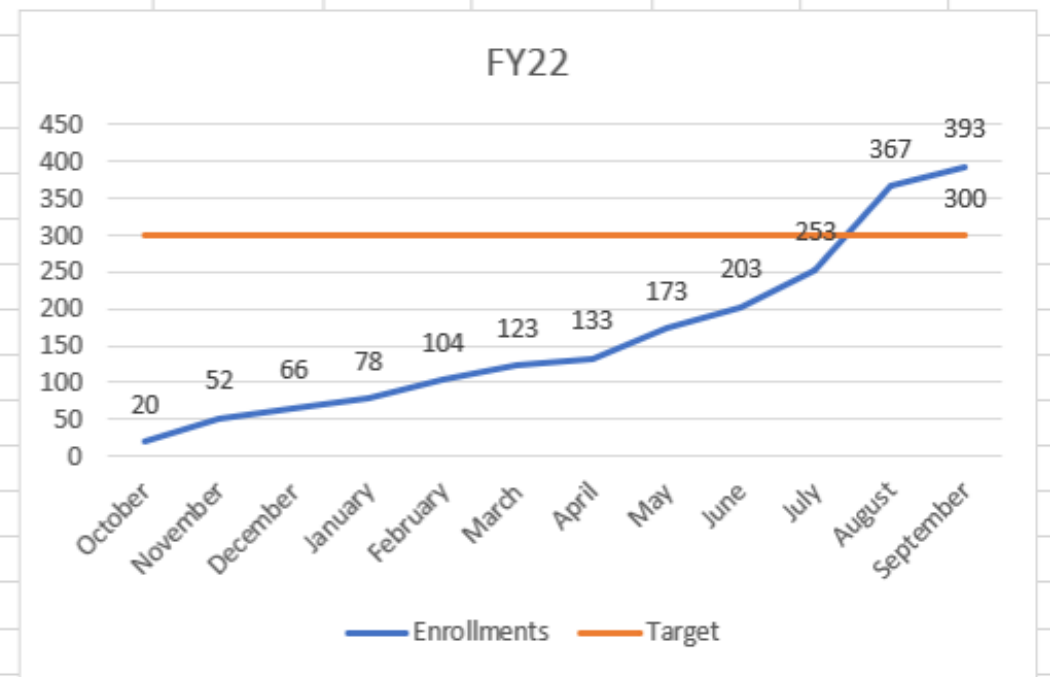
# Bethany Christian Services: Completion by workshop tracker

Registration Date	Disenrollment Date	Number of Sessions *			Attendance								Surveys			Participant Class Completion Rate
		Attended	Missed	Made up	11/01/2022	11/03/2022	11/08/2022	11/10/2022	11/15/2022	11/17/2022	11/22/2022	11/24/2022	ACS	Entrance Survey	Exit Survey	
10/13/2022		0	8	0	No	No	No	No	No	No	No	No	9/30/2022	10/5/2022		0%
10/11/2022		5	3	0	Yes	Yes	Yes	Yes	No	Yes	No	No	10/11/2022	11/1/2022	12/1/2022	107%
10/11/2022		6	2	0	Yes	Yes	Yes	Yes	Yes	Yes	No	No	10/11/2022	11/1/2022	12/1/2022	107%
10/11/2022		6	0	2	Made Up	Yes	Yes	Yes	Made Up	Yes	Yes	Yes	10/11/2022	11/3/2022	11/22/2022	107%
10/11/2022		3	4	1	Yes	Made Up	No	No	No	No	Yes	Yes	10/11/2022	11/1/2022	11/22/2022	53%
10/11/2022	11/11/2022	7	0	1	Yes	Yes	Yes	Yes	Made Up	Yes	Yes	Yes	10/11/2022	11/1/2022	11/22/2022	107%
10/11/2022	11/11/2022	1	2	1	Made Up	Yes	No	No					10/11/2022	11/3/2022		27%
10/11/2022		3	5	0	Yes	Yes	Yes	No	No	No	No	No	10/11/2022	11/1/2022	12/1/2022	67%
10/11/2022		5	3	0	Yes	Yes	No	No	Yes	No	Yes	Yes	10/11/2022	11/1/2022	11/22/2022	67%
10/11/2022		4	4	0	Yes	Yes	Yes	Yes	No	No	No	No	10/11/2022	11/1/2022	12/1/2022	80%
10/11/2022		6	0	2	Made Up	Yes	Yes	Yes	Yes	Yes	Made Up	Yes	10/11/2022	11/3/2022	11/22/2022	107%
10/11/2022		0	8	0	No	No	No	No	No	No	No	No	10/11/2022			N/A
10/11/2022		8	0	0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	10/11/2022	11/1/2022	11/22/2022	107%
11/02/2022		4	4	0	Yes	Yes	Yes	Yes	No	No	No	No	11/1/2022	11/2/2022	12/1/2022	80%
11/02/2022		6	2	0	Yes	Yes	No	No	Yes	Yes	Yes	Yes	11/1/2022	11/2/2022	11/22/2022	80%
11/02/2022		3	2	3	Yes	Yes	Made Up	Made Up	Made Up	Yes	No	No	11/1/2022	11/3/2022	11/30/2022	107%
11/03/2022		2	5	0		Yes	Yes	No	No	No	No	No	11/3/2022	11/3/2022		27%
11/03/2022		5	2	0		Yes	Yes	Yes	No	No	Yes	Yes	11/3/2022	11/3/2022	11/22/2022	67%
11/03/2022		1	5	0			No	No	Yes	No	No	No	11/3/2022	11/3/2022	12/1/2022	13%
					88%	89%	63%	53%	50%	44%	44%	44%	Entrance/Exit Completion Rate		83%	
					46.6% (7) of class participants who completed the Exit Survey have satisfied the class completion of 90% . These seven make up 38.8% of the class based on all that have completed the Entrance Survey.											

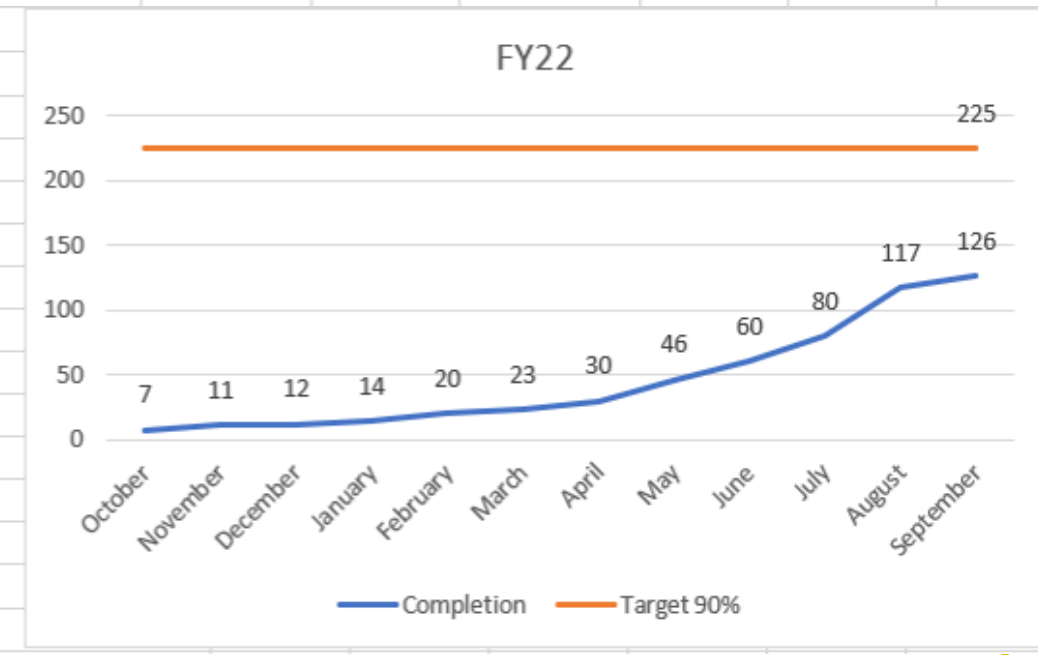


# Bethany Christian Services: Workshop completion dashboard by month

FY22	Enrollments	Target
October	20	300
November	52	300
December	66	300
January	78	300
February	104	300
March	123	300
April	133	300
May	173	300
June	203	300
July	253	300
August	367	300
September	393	300



FY22	Completion	Target 90%
October	7	225
November	11	225
December	12	225
January	14	225
February	20	225
March	23	225
April	30	225
May	46	225
June	60	225
July	80	225
August	117	225
September	126	225



What are your questions for Bethany Christian Services of Georgia?

**Enter your questions into the chat, or let us know if you would like to ask aloud!**





# Using nFORM 2.0 data tools to identify clients who stop participating



**Current Selections**

Grantee Name: Cloud Grantee 3 RF (LE)

Population Name: Reentering individual

Series: June 2021 Series, WMR

Workshop Series: **WMR**, June 2021 Series

Buttons: < Clear Selections >

Analyze primary workshop participation by client population, date range, workshop, and session series. Grantees serving multiple populations should select a population of interest to view progress toward the population-specific primary workshop participation target. Selecting specific calendar years and months filters the data to clients who enrolled during the selected timeframes. Note that data for this tab are only available for clients who were assigned to populations for which the grantee has enrollment targets.

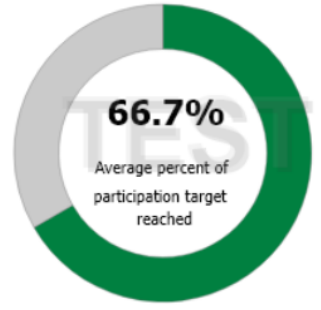
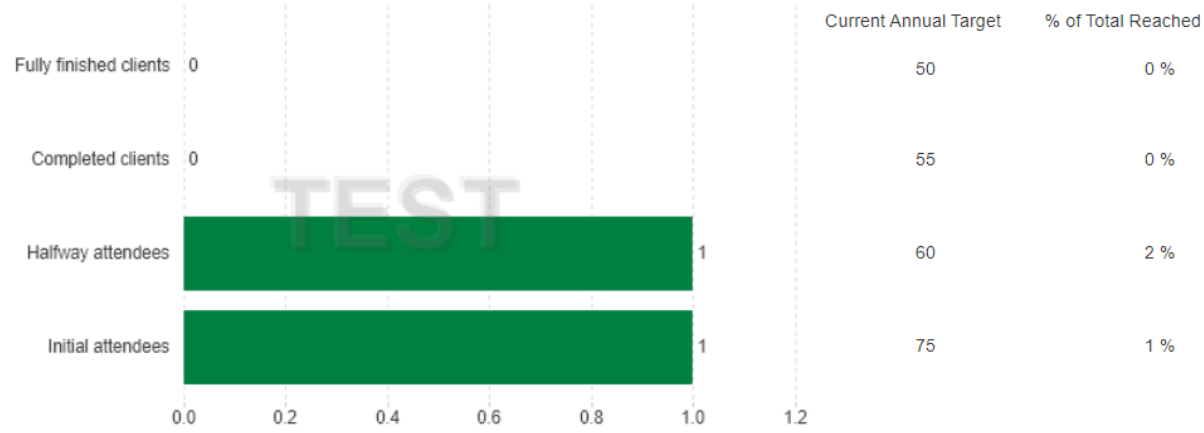
**PROGRESS TOWARDS TARGET PARTICIPATION IN PRIMARY WORKSHOPS**

**18**  
Clients did not participate in any primary workshop sessions

**1**  
Clients participated in at least one primary workshop session



**PERCENT OF PARTICIPATION TARGET REACHED**



Start with the query tool to review primary workshop participation



*Filter on workshop and series to monitor primary workshop participation by cohort*



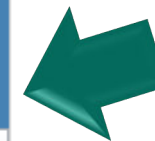
# Steps for using the primary workshop participation detailed report to identify clients who stop participating

**1. Generate an up-to-date version of your grantee's primary workshop participation detailed operational report and save it as an Excel file to a secure local folder**

- Delete client names from the report when no longer needed

**2. Filter on clients who have attended less than 90% of target hours**

Participation in Primary Workshop(s) Hours	Target for Participation in Primary Workshop(s) Hours	% of Participation in Primary Workshop(s)
24	24	100.0%
12	24	50.00%
24	24	100.0%







# Steps for identifying clients who stop participating (cont.)

**3. Filter on enrollment date, entrance survey date and/or most recent primary workshop session attended date to identify clients who have had the opportunity to complete primary workshops but have not attended the target hours**

Enrollment Date	Entrance Survey Completion Date	Most Recent Primary Workshop Session Attended Date
<input type="text"/>	<input type="text"/>	<input type="text"/>

**4. Sort on client status to determine which clients may or may not still be engaged with the program**

- Review clients with a status of “Active” to determine whether their status should be updated—review nFORM status codes in Table VII.1 of user manual



# Example PWP detailed report filtered on clients who have stopped participating

Client Population	Client ID	Couple ID (if applicable)	Client First Name	Client Last Name	Current Client Status	Enrollment Date
Community individual	33334444		Yogi	Bear	Active	10/1/2022
Community individual	12341234		Cookie	Monster	Temporary hold	12/1/2022

Entrance Survey Completion Date	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)
10/10/2022	12/17/2022		12	24	50.0%
12/15/2022	12/21/2022		8	24	33.3%



# Steps for identifying clients who stop participating (cont.)

## 5. If applicable, merge in assigned case manager to the right of “Exit survey completion date” by downloading the caseload summary report and using a vlookup formula

- Insert Client ID into the first column in both the primary workshop participation detailed report and caseload summary report
- **Vlookup formula:** =VLOOKUP(A3,'[RPT\_CaseLoad\_Mgmt.xlsx]Sheet2'!\$A:\$M,2,FALSE)

## 6. Add the title “Next steps” to the first blank column next to “% of participation in primary workshop(s)” on the righthand side to document follow up decisions and actions for each client



# Example PWP detailed report with additional data merged and next steps included

Client Population	Client ID	Couple ID (if applicable)	Client First Name	Client Last Name	Current Client Status	Enrollment Date
Community individual	33334444		Yogi	Bear	Active	10/1/2022
Community individual	12341234		Cookie	Monster	Temporary hold	12/1/2022

Entrance Survey Completion Date	Most Recent Primary Workshop Session Attended Date	Exit Survey Completion Date	Assigned Case Manager	Participation in Primary Workshop(s) Hours	Target for Participation in Primary Workshop(s) Hours	% of Participation in Primary Workshop(s)	Next Steps
10/10/2022	12/17/2022		McInerney, Hannah	12	24	50.0%	Confirm with Hannah whether client status should be updated. If client is actively engaged, identify opportunities for client to complete the workshop. If not actively engaged, Hannah will update client status and conduct additional outreach as needed.
12/15/2022	12/21/2022		Castro, Sarah	8	24	33.3%	Identify a date with Sarah to follow up with the client.



# Identifying why clients stop participating



# Identify why clients stop participating

## / Review status codes and other data points to determine why clients stopped participating in the program

- Determine how many clients could be reengaged in programming compared to clients who could not

## / Identify trends and determine whether processes should be revised

- Use this information to develop CQI strategies

### Status codes for clients who are no longer Active

Completed/graduated

Consent revoked

Deceased

Drop out

Incarcerated

Moved out of area

Non-responsive

Removed from program

State of emergency

Temporary hold



# Identify why clients stop participating (cont.)

- / Consult with program staff for additional information about overall trends and specific clients**
- / Monitor the issues/needs and case notes entered as part of service contacts to gather details that explain a client's lack of engagement**
  - For example, during a recent service contact a client may have reported a challenge with participation that made it difficult for them to participate in in-person workshop sessions
- / If a client is part of a couples' population, consider reviewing their partner's information for further clues**
  - For example, the partner of a client who stopped engaging with the program and was unresponsive to outreach may have communicated to program staff that they broke up

# What are your tips?

**What recommendations, tips, or considerations do you have for identifying clients who stop engaging in workshops?**

**Add your thoughts or suggestions to the chat!**







# nFORM enhancement and resources



# nFORM incentive enhancements

## / **Recording and updating incentives – now available!**

- nFORM will continue to flag clients who receive more than the total maximum incentive amount (\$350); incentive category maximums have been removed
- Survey participation incentives relabeled to survey completion, in line with ACF guidance
- Operational report now tracks all incentives, not just those exceeding maximums

## / **Reminder – ACF incentive guidance available on the HMRF Grantee Resources site**

<https://www.hmrfgrantresources.info/resource/acf-guidance-program-incentives>



# Updated and new resources available

- / Reviewing Workshop Participation in the QPR/PPR: new tip sheet with detailed information about reviewing optional and primary workshop information**
- / Interactive snapshots highlight findings from cross-site analyses of HMRF grantees in 2015 cohort**
- / Coming soon! Updated versions of the nFORM 2.0 User Manual and Performance Measures and Data Collection Logistics Manual**
  - Updated information to reflect recent nFORM enhancements, expanded client status definitions, and additional details about nFORM data tools and reports



# Questions?

