

# Using nFORM 2.0 Data to Monitor Workshop Participation

April 11, 2023  
nFORM 2.0 Team  
Mathematica

**OFFICE OF FAMILY ASSISTANCE**

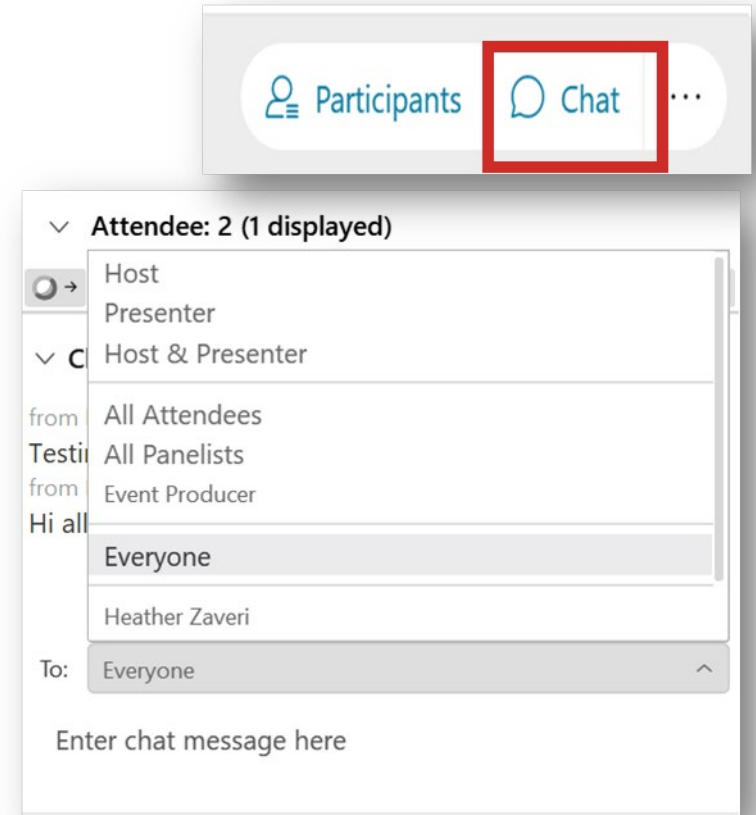
An Office of the Administration for Children & Families





# 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

- / nFORM reports for monitoring client-level workshop participation**
- / Private Industry Council of Westmoreland/Fayette: Approach to monitoring workshop participation**
- / Deep dive: Using nFORM 2.0 data tools to analyze workshop participation trends**
- / Announcements**



# nFORM reports for monitoring client-level workshop participation



# nFORM reports for monitoring client-level workshop participation

## Series Session Attendance Report

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

## Primary Workshop Participation Detail Report

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

## Data Export

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



# Generate the operational reports and data export from the Reports tab in nFORM



## Operational Reports

- [Caseload Summary](#)
- [Client Status Report Summary](#)
- [Incentives Report](#)
- [Individual Service Contacts](#)
- [Local Evaluation Enrollment](#)
- [Phone Number Report](#)
- [Primary Workshop Participation Detail Report](#)
- [Primary Workshop Participation Summary](#)
- [Series Session Attendance](#)
- [Survey Completion Summary](#)
- [Survey Report - Paper Survey](#)
- [Survey Report - Refused Survey](#)
- [User Account Activity](#)
- [Zip Code Report](#)



# Series Session Attendance Report Example

**Grantee:** Families Together  
**Workshop:** Communication is Key  
**Series:** Cohort 1 6.1-6.30.21  
**Registration Required:** Yes  
**Start Date:** 06/01/2021 **End Date:** 06/30/2021  
**Meeting Day(s):** Tue  
**Total Workshop Hours:** 12  
**Scheduled Location:** E5 Building  
**Facilitators:** Bob Mister

**Includes workshop session details**

Client ID	Couple ID (if applicable)	Client	Client Grantee Location	Registration Date	Disenrollment Date	Number of Sessions *			Attendance		
						Attended	Missed	Made up	06/08/2022	06/15/2022	06/29/2022
10051052		Stark, Sansa	Kings Landing	5/29/2021		3	0	0	Yes	Yes	Yes
10051078		Martell, Oberyn	Kings Landing	5/29/2021		3	0	0	Yes	Yes	Yes
10051094		Hound, The	Kings Landing	5/29/2021		1	1	1	Yes	Made up	No
10051117		Targaryen, Daenerys	Kings Landing	5/29/2021		1	0	0	Yes	No	No
10051120		Tyrell, Olenna	Kings Landing	5/29/2021		3	0	0	Yes	Yes	Yes
10051133		Stark, Ned	Kings Landing	5/29/2021		1	2	0	Yes	No	No

**To monitor attendance across more than one series, review each tab of the report in Excel**





# Primary Workshop Participation (PWP) Detail Report Example

## Families Together

### Participation in Primary Workshop(s)\* - Detail Report

Location	Client Population	Client ID	Couple ID (if applicable)	Client First Name	Client Last Name	Current Client Status	Enrollment Date	Entrance Survey Completion Date
Family Center	Adult couple	10001374	10101	Mickey	Mouse	Completed/Graduated	12/16/2021	12/17/2021
Family Center	Adult couple	10001400	10101	Minnie	Mouse	Completed/Graduated	12/16/2021	12/17/2021

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)
2/8/2022		9	12	75.0%
2/8/2022		9	12	75.0%

**Grantees can merge in other variables from the data export to monitor PWP trends**



# Data export: session attendance tab

## / Provides client-level information on workshop series session attendance

- / Each row provides data about a single session a client attended
- / Enrolled clients that have not yet attended a workshop session are also included

## / Tab includes workshop type so that grantees can identify whether a session that a client attended was in a primary or optional workshop

## / Key data points include:

- ❖ Workshop information
- ❖ Session series name
- ❖ Session name (if applicable) and date
- ❖ Day of the week the session occurred on
- ❖ Session start and end time and total duration
- ❖ Whether the client registered beforehand and attended, or attended as a drop-in
- ❖ Make up date (if applicable)



# Tips for monitoring and analysis

- / Consider which report will best answer your workshop participation questions**
  - For example, grantees should use the session series attendance report or data export to monitor participation trends by workshop series
- / Grantees serving couples should include couple ID in their analysis to monitor workshop attendance**
- / 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



# **Private Industry Council of Westmoreland/Fayette, Inc: Approach to monitoring workshop participation**



# Daniel Bell: Data Manager for Private Industry Council of Westmoreland/Fayette



**Overview of Private Industry Council's Fatherhood FIRE program**



**Description of Private Industry Council's program monitoring needs**



**Private Industry Council's process for monitoring workshop participation**



# PIC Primary Workshop Participation Detail Report Example

Client First Name	Client Last Name	Current Client Status	Enrollment Date	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)
		Non-responsive	10/31/2022	10/31/2022	12/6/2022		24	24	100.0%
		Non-responsive	10/31/2022	10/31/2022	12/6/2022		24	24	100.0%
		Active	5/7/2021	5/7/2021	3/24/2023		24	24	100.0%

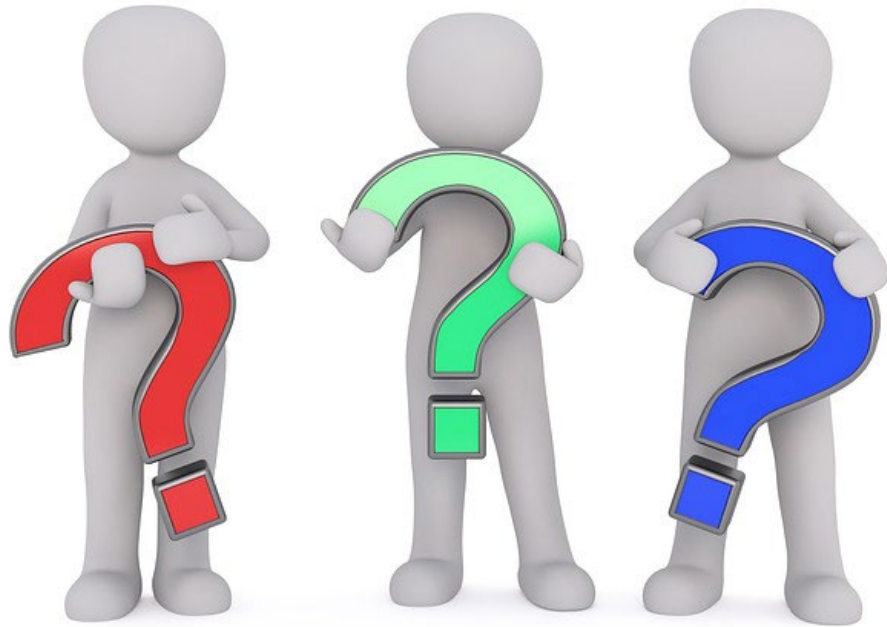
Exit Survey Completion Date	Participation in Primary Workshop(s) Hours	Target for Participation in Primary Workshop(s) Hours	% of Participation in Primary Workshop(s)	Sessions Needed
	18	24	75.0%	2
	18	24	75.0%	2
	16	24	66.7%	3



# PIC Workshop Participation Tracker Example

Date of Sessions Names		1	2	3	4	5	6	7	8	9	10	11	12
		5/3/22	5/4/22	5/10/22	5/11/22	5/17/22	5/18/22	5/24/22	5/25/22	5/31/22	6/1/22	6/7/22	6/8/22
1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 6-1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3		<input checked="" type="checkbox"/> 5-17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6		<input checked="" type="checkbox"/> 5-17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7		<input checked="" type="checkbox"/> 5-12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# What are your questions for Private Industry Council?



**Enter your  
questions into the  
chat or ask Daniel  
aloud!**

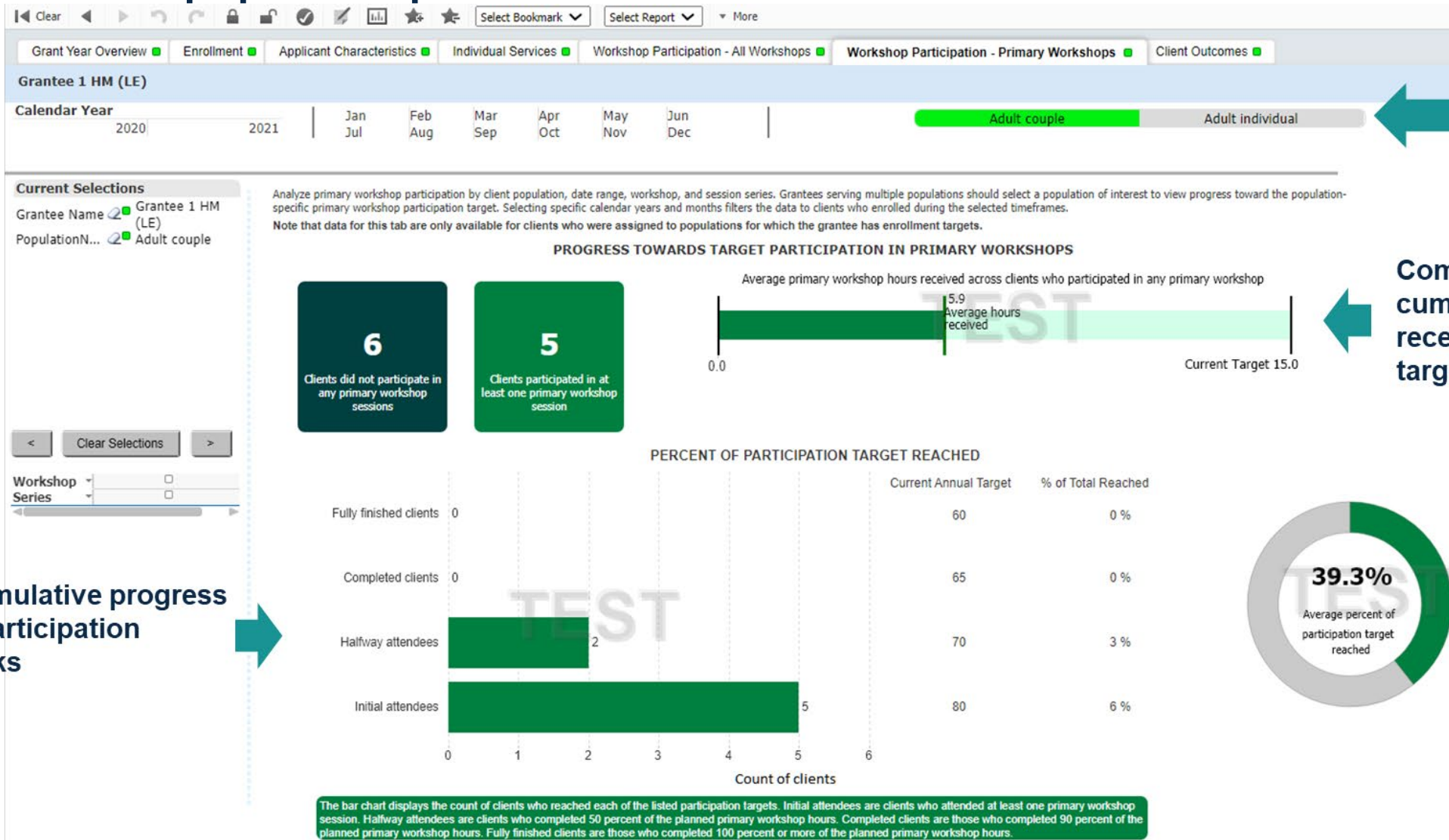






# Using nFORM 2.0 to analyze workshop participation trends

# Start with the query tool to review trends in primary workshop participation





# Dive deeper into workshop participation trends

/ **Using the series session attendance report, PWP detail report, and data export, grantees can analyze workshop participation trends by a select variable to explore factors that may affect program completion**

**Workshop characteristics** (for example, location, schedule, format, or facilitator)

**Client characteristics** (for example demographics, enrollment time period, referral source, or reason(s) for enrolling)



# Example: Examine primary workshop participation by referral source

**Analysis goal:** Understand primary workshop participation trends by client referral source to explore potential strategies for improving recruitment and enrollment

## / **Analysis overview**

- Using the PWP detail report, merge in “Referral Type” and “Referring Organization” from the client info tab of the data export
- Insert a pivot table that shows how many clients either completed or did not complete primary workshops by referral source



# Analysis steps

- / **Step 1: Generate a tailored version of the PWP Detail report by filtering on client enrollment date to include only clients who have had the opportunity to complete primary workshops, based on your program flow. Save the report to a secure folder and delete client names.**
- / **Step 2: Generate a data export and save to a secure folder.**
- / **Step 3: Insert two new columns in the PWP Detail report in between “Couple ID (if applicable)” and “Current Client Status”. Label the first column “Referring Organization” and the second column “Referring Organization Type”.**

Client ID	Couple ID (if applicable)	Referring Organization	Referring Organization Type	Current Client Status
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# Analysis steps – add new completion variable

- / **Step 4:** In the PWP Detail report, label the blank column to the right of “% of Participation in Primary Workshop(s)” with the title “Completed Primary Workshop (Y/N)”.
- / **Step 5:** Populate this column with N for clients who have completed 0-89.9% of primary workshop hours and Y for clients who have completed 90% or more of primary workshop hours. To do so:
  - Filter the report on the “% of Participation in Primary Workshop(s)” by each of these two percentage ranges, then copy and paste either N or Y as applicable down the filtered rows
  - OR, use an Excel formula to generate the appropriate Y or N value for each row. For example:

```
=IF(NUMBERVALUE(N4)>=0.9, "Y", "N")
```

Exit Survey Completion Date	Participation in Primary Workshop(s) Hours	Target for Participation in Primary Workshop(s) Hours	% of Participation in Primary Workshop(s)	Completed Primary Workshop (Y/N)
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# Analysis steps – merge referral source

**/ Step 6: Merge in referring organization and referring organization type to the right of “Couple ID” from the client info tab of the data export using a formula**

**- Referring organization (R4L grantees replace “K” with “J”):**

```
=INDEX(' [DataExport.xlsx]Client Info'!$K:$K,  
MATCH(C4, ' [DataExport.xlsx]Client Info'!$A:$A,0))
```

**- Referring organization type (R4L grantees replace “L” with “K”):**

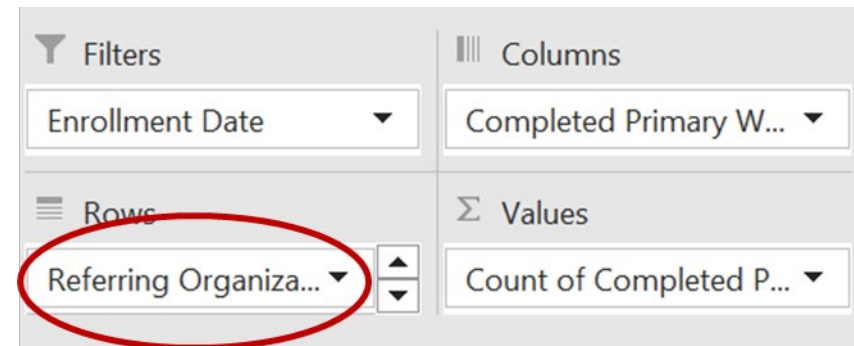
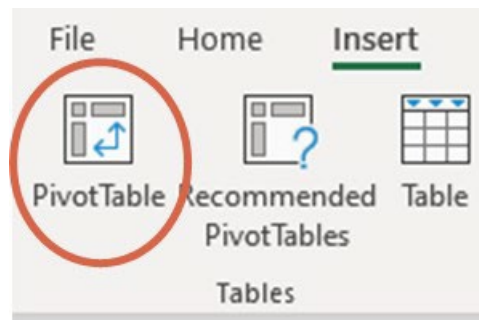
```
=INDEX(' [DataExport.xlsx]Client Info'!$L:$L,  
MATCH(C4, ' [DataExport.xlsx]Client Info'!$A:$A,0))
```

Couple ID (if applicable)	Referring Organization	Referring Organization Type	Current Client Status	Enrollment Date



# Analysis steps – pivot table

- / **Step 7: Use the data from the PWP Detail report to create a pivot table.**
- / **Step 8: Add “Referring Organization” to the Rows field, then add “Referring Organization Type” below “Referring Organization” in the Rows field.**

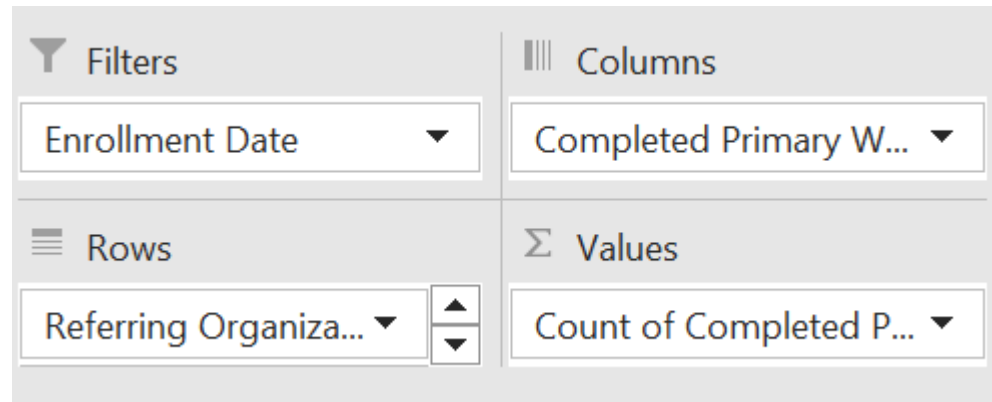






# Analysis steps – pivot table (cont.)

- / **Step 9: Add “Completed Primary Workshop (Y/N)” to the Columns field.**
- / **Step 10: Add “Completed Primary Workshop (Y/N)” to the Values field as well.**
  - Make sure to display the count of “Completed Primary Workshop (Y/N)”





# Example workshop participation by referral source pivot table

Refer to the Data Dictionary to map the Referral Organization Type label to the value merged from the data export

Count of Completed Primary Workshop (Y/N)			
Referral Source	Did Not Complete	Did Complete	Total
<input type="checkbox"/> External Organization			
Hannah's House	3	1	4
Sarah's Place	3	2	5
<input type="checkbox"/> Head Start			
North County Head Start		5	5
<b>Total</b>	<b>6</b>	<b>8</b>	<b>14</b>

If some referral sources appear to be related to a lower number of clients completing primary workshop hours, consult with your team to dig deeper into potential reasons why this is occurring. Then determine whether changes to recruitment or enrollment strategies are needed to address those issues.

# What are your tips?

**What recommendations, tips, or considerations do you have for analyzing workshop participation trends?**

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





# Announcements



# Grant year 4 targets in continuing applications will be added to nFORM in September

## 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					



# nFORM query tool update

/ Updated Enrollment date filter on Individual Services and Workshop Participation – Primary Workshops tabs more visibly displays calendar year 2023

View  Enrollment  Applicant Characteristics  Individual Services  Workshop Participation - All Workshops  **Workshop Participation - Primary Workshops**  Client Outcomes

**Cloud Grantee 3 RF (LE)**

**Calendar Year**

2020	2021	2022	2023	Jan	Feb	Mar	Apr	May	Jun
				Jul	Aug	Sep	Oct	Nov	Dec

Community couple  **Community individual**





# Updated and new resources available

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



# Questions?

