

Using nFORM to monitor goals

August 8, 2023
nFORM 2.0 Team
Mathematica

OFFICE OF FAMILY ASSISTANCE
An Office of the Administration for Children & Families

OPRE

HMRF
HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

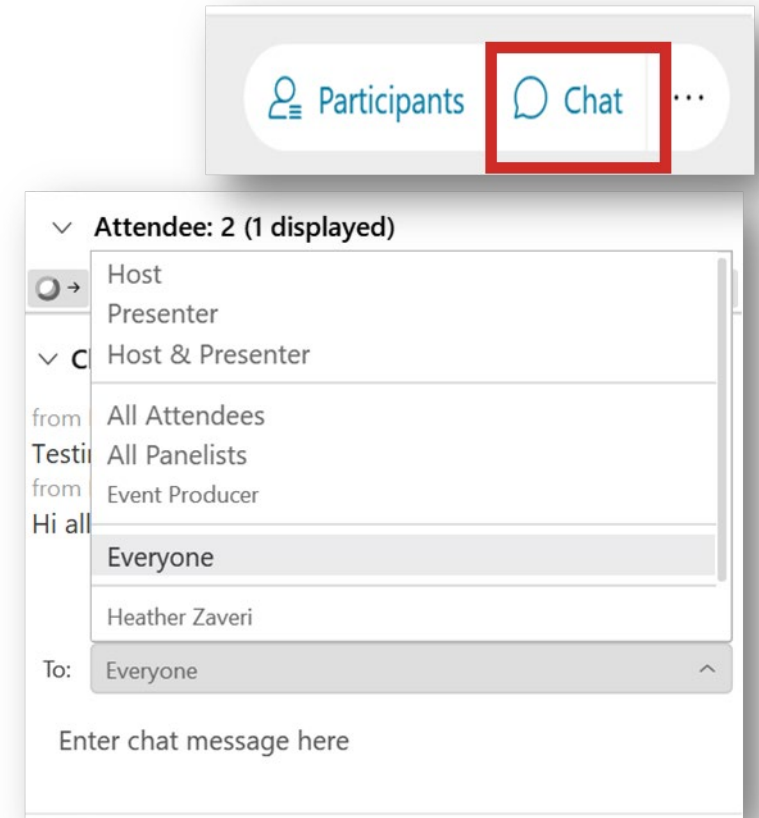
 **Mathematica**
Progress Together

BUiLD
Building Usage, Improvement, & Learning
with Data in HMRF Programs



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 resource site
 2. Review the Performance Measures and Data Collection Logistics Manual on the resource site for more information on keeping data secure



Today's topics

- / Managing user accounts**
- / Recap of performance targets**
- / Developing program-specific goals**
- / Tips for monitoring goals**
- / Deep dive: Reviewing progress on referral source targets**
- / Announcements**



Managing user accounts



Managing nFORM user accounts

- / Recent security updates will lock inactive user accounts**
- / Site administrators should review the User Account Activity detailed report to monitor user account status and login activity**
- / Follow up as needed with staff to reactivate accounts before they become locked**

Tip: Set calendar reminders to log into nFORM



Example user account activity report

Grantee Name	Location	User Last Name	User First Name	User Type	User Name (email)
Family Connections	Central Office	Hobbs	Miranda	Site Administrator	MHobbs@ymail.com

Enrollment	Case Manager Assignment	Service Provider Management	Sessions Series Management	Query Tool	Account Creation	Last Login	# Days since Last Login Activity	User Account Status
x	x	x	x	x	6/20/2023	6/20/2023	49	Active

Monitor the last login date and days since last login to update user accounts and follow up with staff



Recap of performance targets



Context

/ Grantees develop and monitor progress on annual enrollment and primary workshop participation targets for each population served

- PPR Section C-03.2 shows progress toward enrollment targets
- PPR Section C-04.2b shows progress toward primary workshop participation targets

/ ACF also requires Fatherhood FIRE grantees to provide each client with at least 8 substantive individual service contacts

- These are reported on PPR Section C-04.3



Primary workshop hours and participation targets

- / **FRAMEWorks and READY4Life targets should be at least 12 hours**
- / **Fatherhood FIRE targets should be at least 24 hours**

Initial attendees	<ul style="list-style-type: none">• The number of clients who attend at least one primary workshop session
Halfway attendees	<ul style="list-style-type: none">• The number of clients who attend at least 50 percent of the target hours for primary workshops
Completed clients	<ul style="list-style-type: none">• The number of clients who attend at least 90 percent of the target hours for primary workshops
Fully finished clients	<ul style="list-style-type: none">• The number of clients who attend at least 100 percent of the target hours for primary workshops



Developing program-specific goals



Why create a program-specific goal?



Measurement: Give your team a gauge to track progress toward performance and improvement goals



Clarity: Ensure all staff are on the same page about the program's priorities



Focus: Help the team stay centered on what matters



Motivation: Inspire the team and motivate with progress updates toward the goal



Program-specific goals...

- / Answer the question: What are we trying to accomplish?**
- / Are tied to specific workflows or challenges**
 - For example, referrals from partner organizations, attendance at first session
- / Specify by how much, for whom, and by when you want to see progress?**



Make your goal SMART

/ Specific, measurable, achievable, relevant, and timebound

Less helpful	SMART
We want to reach our annual enrollment target	We want to enroll one-tenth of our annual target in each month of the year, except December and June, to allow for staff training and vacations.
We want to improve primary workshop participation	We want to increase the percentage of enrolled clients attending the first workshop from 64 percent as of July 2023 to 85 percent by October.

/ Identify a data source (or sources) to track your goal

- When identifying a data source, consider
 - Fit—Does the measure we’re using actually help us to understand progress?
 - Feasibility—How easy will it be to track this over time?





Share with us!

/ What program-specific goals are you currently tracking?





Tips for monitoring goals



nFORM 2.0 data tools

QPR/PPR

- Year-to-date progress on HMRF performance measures
- Generate current QPR or PPR (and school year performance report for R4L grantees) at any time for updated information on grantee performance

Query tool

- Seven separate tabs show visualizations of aggregate progress on client measures
- Explore performance by different factors including time frame and service type

Operational reports

- 15 reports available in Excel to manage day-to-day operations and track performance
- Include summary and detailed reports to be reviewed individually or combined

Data export

- Access all detailed nFORM data except for PII
- Data organized on separate tabs by data type for in-depth analyses



Create an approach to monitor progress

- / **What do you need to track?**
 - Such as enrollment, service contacts, workshop participation?
- / **What level of information do you need?**
- / **How often do you need to track it?**
 - Every week, month, quarter, or other time period?
- / **What information do you need to share with your team?**
What format will support decision making?
- / **Map out which data tools and reports provide the data you need, in the timeframe and format needed**

Each nFORM 2.0 data tool and report supports specific needs and can be used on its own or in combination with other tools and reports



Other tips for using nFORM tools to monitor goals

- / **Use unique identifiers to link data across multiple data sources**
 - Including client ID, couple ID, service provider ID, workshop session ID, and service contact ID
- / **Insert targets into reports to calculate progress**
- / **Merge program-specific information such as service providers, locations, service assignments (if applicable) and workshop names**
- / **For grantees serving couples, consider whether information is needed at the individual partner or couple level**
- / **Keep data secure by deleting client names from operational reports when not needed**

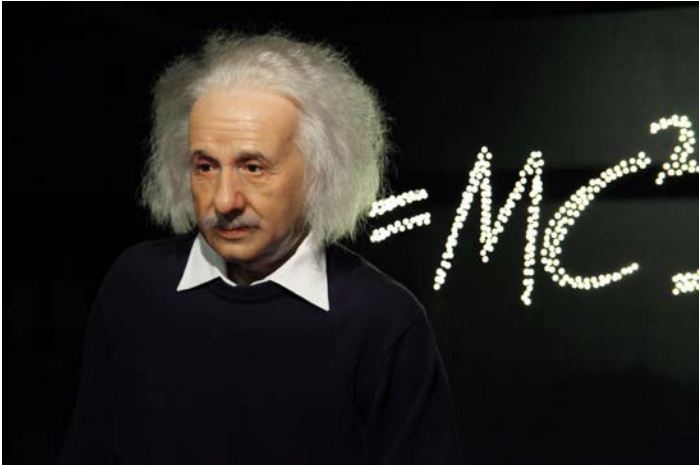


Which of these photos best represents your experience using data to monitor goals?

A



B



C





Deep dive: Reviewing progress towards referral goals



Referral goal analysis

Goal

Receive and enroll at least 5 referrals each month from each partner organization

/ **Analysis objective**

- To understand progress on referral source goals and identify whether additional strategies are needed to increase referrals from specific organizations

/ **Analysis overview**

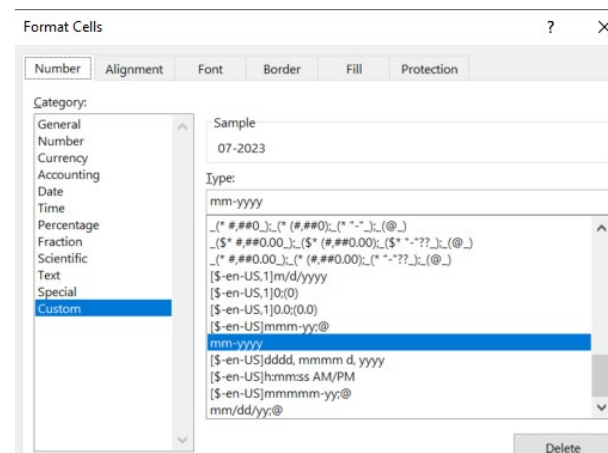
- Using the data export, create a pivot table to review the number of clients referred by community partners in the last month



Analysis steps

- / **Step 1: Generate an up-to-date version of your grantee's data export and save it to a secure local folder**
- / **Step 2: Navigate to the Client Info tab and reformat the enrollment date column to show dates as month and year**

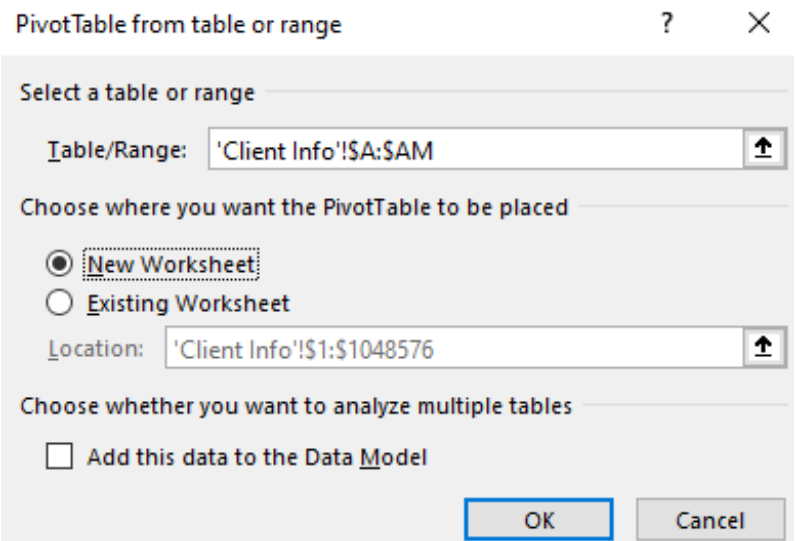
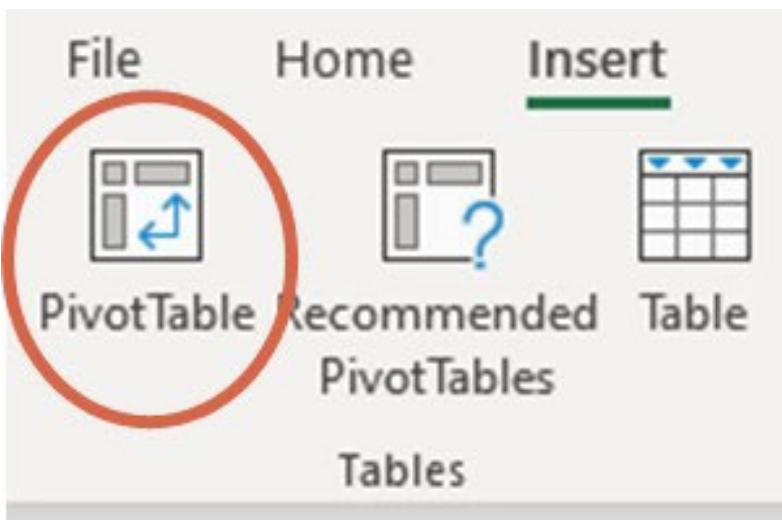
K	L	M
Referring Organization	Referring Organization Type	Enrollment Date
Family Ties	6	07-2023
Poetic Justice		07-2023
Poetic Justice	19	07-2023
Poetic Justice	19	07-2023
Poetic Justice	10	07-2023
Poetic Justice	10	05-2023
Poetic Justice	9	05-2023
Humble, LLC.	17	06-2023





Analysis steps 2

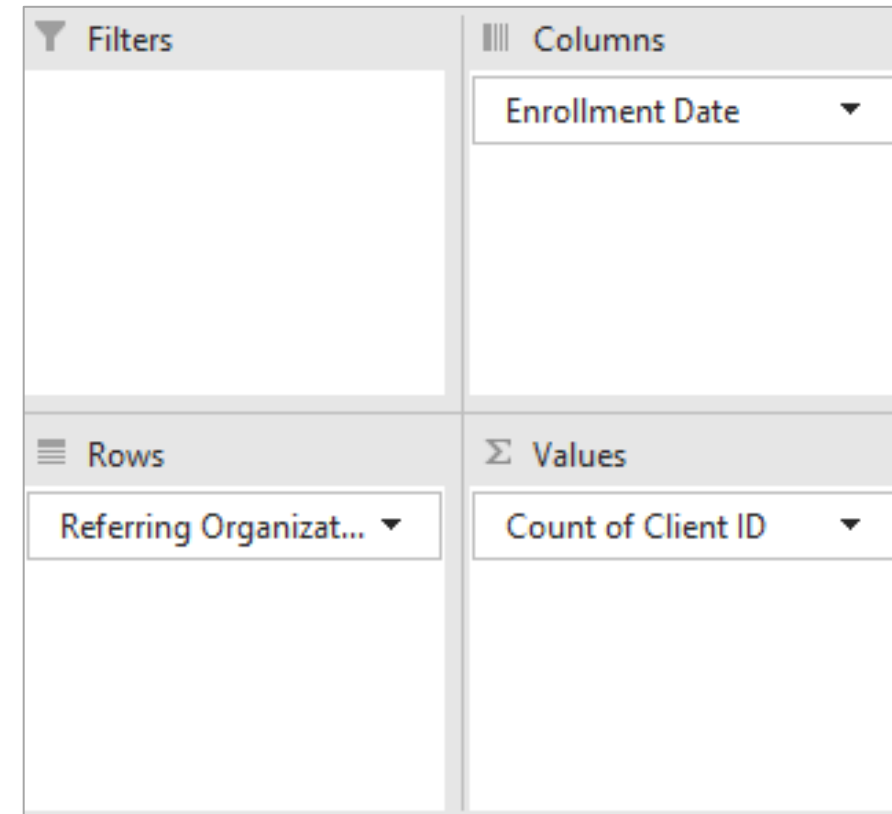
/ **Step 3: Insert a pivot table on a new worksheet to monitor enrollment by referring organization**





Analysis steps 3

/ Step 4: Add “Enrollment date” to the columns field, “Referring Organization” to the rows field, and Client ID to the values field





Analysis steps 4

- / **Step 5: Create a new blank tab in the data export. Copy and paste the pivot table onto the new tab.**
- / **Step 6: Sort on the total number of referrals provided by organizations in the past 3 months**

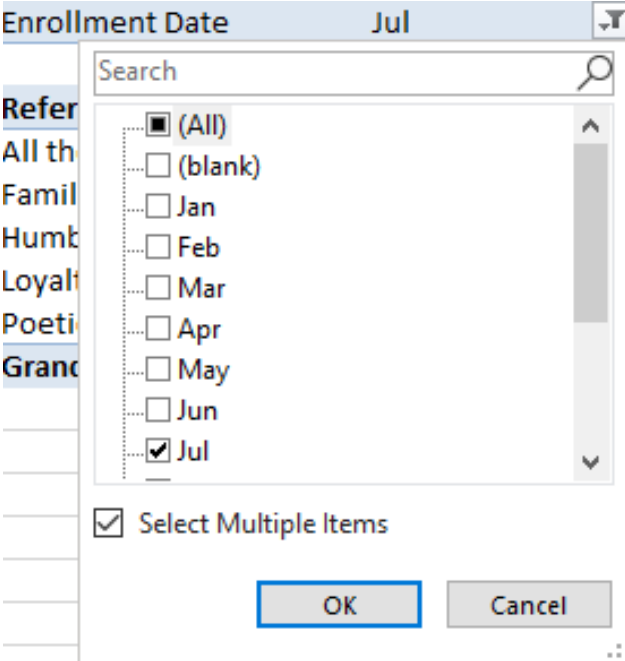
Count of Client ID	Column Labels			2023 Total	Grand Total
Referring organization	2023	May	Jun	Jul	
All the Stars, Inc.			1	8	9
Family Ties		1	6	4	11
Humble, LLC.			2	8	10
Loyalty Lane			2	2	4
Poetic Justice		2	3	7	12
Grand Total		3	14	29	46



Analysis steps 5

/ **Step 7: Another way to analyze referral organizations is to filter the pivot table by enrollment date to determine how many clients were referred last month**

Referring organization	Count of Client ID
All the Stars, Inc.	8
Family Ties	4
Humble, LLC.	8
Loyalty Lane	3
Poetic Justice	7
Grand Total	30





Take your analysis a step further

- / **Step 8: Copy and paste the referring organization and count of Client ID into a new table**
- / **Step 9: Insert 3 new columns for your 1) target goal, 2) percentage of completion, and 3) number of referrals needed to reach your goal**

Referring organization	Count of Client ID	Goal	% of Completion	# of Referrals to goal
All the Stars, Inc.	8	5	160%	-3
Humble, LLC.	8	5	160%	-3
Poetic Justice	7	5	140%	-2
Family Ties	4	5	80%	1
Loyalty Lane	2	5	40%	3


= Count of Client ID/Goal



Share with us!

/ How do you monitor progress toward performance and improvement goals?





nFORM announcement



Finalizing grant year 4 targets

- / Initial and reminder emails were sent to program leadership requesting confirmation or further clarification of grant year 4 targets**
 - Final targets must be sent to the nFORM team and assigned FPS by **August 9**
- / Updated targets will be available in nFORM starting on September 30, 2023**
- / Reach out to your FPS with any questions about your program's enrollment or primary workshop participation targets**



Questions?

