Examining Survey Administration with nFORM Data Tools

October 10, 2023
nFORM 2.0 Team
Mathematica

Housekeeping

/ **Use the chat to ask questions**

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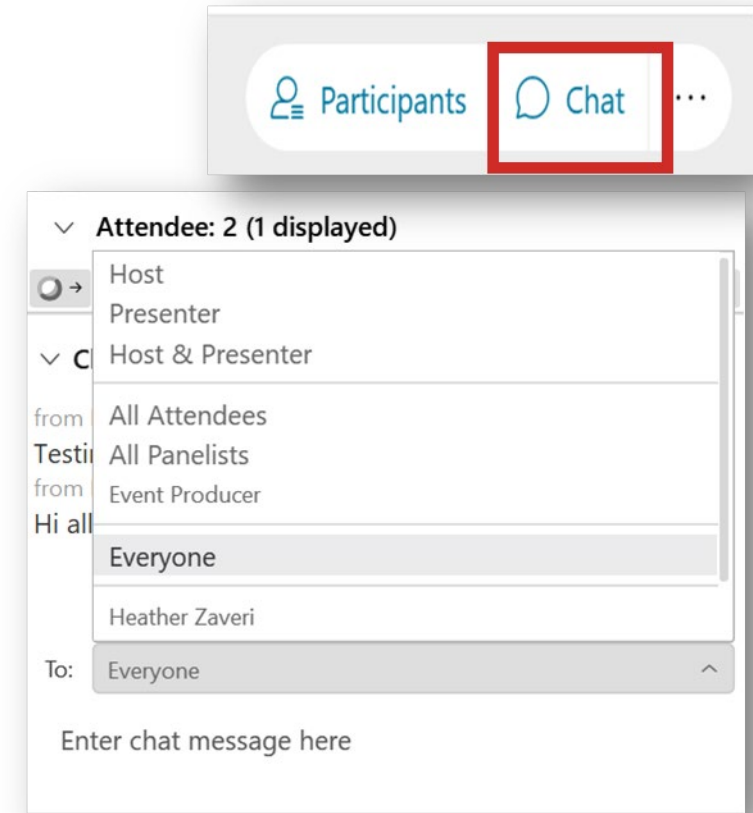
REMINDERS:

/ **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 resources site

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

Today's topics

/ **Overview of nFORM 2.0 client surveys**

/ **Reviewing survey completion and refusal rates**

/ **The Osborne Association: Approach to survey administration**

/ **Identifying potential data quality issues**

/ **Improving survey response rates, completion rates, and data quality**

/ **Resources on nFORM 2.0 surveys**

Administering client surveys

Clients complete three nFORM surveys

Applicant Characteristics Survey (ACS)

- At intake
- Completes enrollment process

Entrance Survey

- At beginning of first workshop session

Exit Survey

- At the end of the last workshop session, OR
- A few weeks after completing the Entrance Survey for shorter programs

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nFORM 2.0 survey administration features

/ **Generate survey passcodes in bulk when administering surveys to groups of clients**

/ **Survey passcodes expire after 96 hours and can be used up to 10 times by a client**

/ **Record when clients refuse a survey and the reason why**

/ **Record paper surveys and data from paper completion**

- Data from paper surveys should be entered within 4 days of completion

- Completion date of ACS can be back dated 4 days for setting the correct enrollment dates for clients

- As a reminder, your FPS needs to approve administration of paper surveys

Why monitor survey administration?

/ **High quality data are essential to program operations, performance monitoring, CQI, and evaluation, and contribute to broader understanding of clients and their experiences**

/ **High quality data are**
- Timely—Entered and available when needed
- Accurate—Valid and reliable
- Complete—Across all applicable fields/data elements
- Secure—Collected and stored following best practices

/ **Monitoring survey administration helps ensure survey data are high quality and collected based on approved plans and procedures**
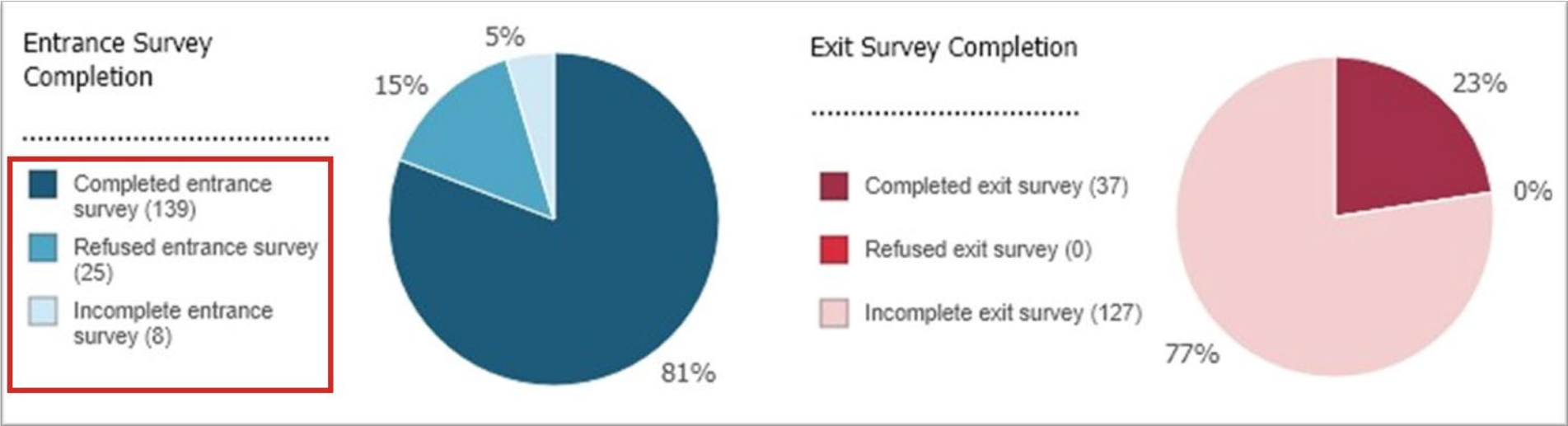
Reviewing survey completion and refusal rates

Use the Grant Year Overview tab of the query tool to monitor survey administration progress

Determine whether the anticipated number of clients enrolled in the current grant year have completed entrance and exit surveys

Entrance Survey Completion

- Completed entrance survey (139)
- Refused entrance survey (25)
- Incomplete entrance survey (8)

5%
15%
81%

Exit Survey Completion

- Completed exit survey (37)
- Refused exit survey (0)
- Incomplete exit survey (127)

23%
0%
77%

Remember that clients who are enrolled but not yet eligible to complete a survey are included in the incomplete survey counts

Review survey completion and refusals using operational reports and data export

/ **Survey Completion Summary report**

- Filter to include all enrolled clients or those enrolled in a specific date range
- Identify the total number of clients who have completed or refused the ACS, Entrance and Exit surveys

/ **Survey Completion Detail Report**

- Drill down further to review client-level information on survey administration

/ **Survey Response Data tab of the data export**

- Review survey completion by the language in which a client completed a survey

Example Survey Completion Summary Report

Grantee	Population	Number of Clients					
		Applicant Characteristics		Entrance Survey		Exit Survey	
		Completed	Refused	Completed	Refused	Completed	Refused
Families Connect	All	53	1	43	1	17	6
	Adult couple	23	1	22	0	7	4
	Adult individual	30	0	21	1	10	2

/ **If the number of clients who have completed or refused each survey does not align with your expectations, drill down using other reports**

/ **Identify clients who need to complete surveys**

/ **Learn more about why clients are refusing to complete surveys**

Example Survey Completion Detail Report

Client Grantee Location	Population	Client ID	Client Last Name	Client First Name	Current Client Status	Application Date	Enrollment Date	Survey Completion Date		
								Applicant Characteristics Survey	Entrance Survey	Exit Survey
Candyland	Adult individual	10026689	White	Snow	Active	8/10/2022	8/11/2022	8/11/2022	In progress	
Candyland	Adult couple	10025716	Dumpty	Humpty	Completed/Graduated	5/17/2022	5/23/2022	5/23/2022	5/30/2022	Refused
Candyland	Adult couple	10025635	Mermaid	Little	Completed/Graduated	5/17/2022	5/23/2022	5/23/2022	5/30/2022	8/9/2022

Encourage clients who have started but not yet submitted a survey to complete

Dive deeper into refusals using the Survey Report – Refused Survey Report

/ **Summary report**

- Identify refusal trends by location, population type (if applicable), survey type, and the number of days surveys were backdated (if paper surveys were entered)

/ **Detailed report**

- Review the detailed version to understand trends by refusal type

/ **Develop strategies to address root causes of survey refusals**

- For example, revise survey scripts to emphasize the confidential nature of each survey

Example Survey Report – Refused Survey

Summary Report

Grantee	Client Grantee Location	Population	Applicant Characteristics Survey						Entrance Survey						Exit Survey					
			Total	0	1	2	3	4	Total	0	1	2	3	4	Total	0	1	2	3	4
Families Connect	All	All	1	0	0	0	0	1	0	0	0	0	0	0	20	0	0	10	10	0
		Adult couple	1	0	0	0	0	1	0	0	0	0	0	0	15	0	0	8	7	0
		Adult individual	0	0	0	0	0	0	0	0	0	0	0	0	5	0	0	2	3	0
	Candy Land	All	1	0	0	0	0	1	0	0	0	0	0	0	19	0	0	9	10	0
		Adult couple	1	0	0	0	0	1	0	0	0	0	0	0	15	0	0	5	10	0
		Adult individual	0	0	0	0	0	0	0	0	0	0	0	0	4	0	0	0	0	0
	Magical Kingdom	All	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1	0	0
		Adult couple	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
		Adult individual	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1	0	0

Detail Report

Client Grantee Location	Population	Client ID	Client Last Name	Client First Name	Current Client Status	Application Date	Enrollment Date	Survey	Date Client Refused Survey	System Entry Date	#Days difference	Reason
Candyland	Adult couple	10024571	Charming	Prince	Active	3/17/2022	4/29/2022	ACS	4/29/2022	5/2/2022	3	Privacy concerns
Magical Kingdom	Adult individual	10025677	Hook	Captain	Active	5/17/2022	5/23/2022	Exit	8/8/2022	8/10/2022	2	Not interested

Survey Response Data tab of data export provides more information on survey administration

Applicant Characteristics Survey Completion Date	Applicant Characteristics Survey Entry Date	Applicant Characteristics Survey Completion Mode	Applicant Characteristics Survey Refusal Reason	Applicant Characteristics Survey Completion Language
2/1/2022		1		1
5/1/2022		3	1	

Review survey completion by the language a client completed a survey in

The Osborne Association: Approach to survey administration

The Osborne Association

Overview of The Osborne Association's Fatherhood FIRE program
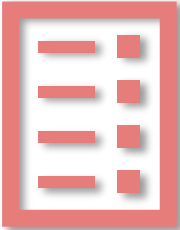
Description of The Osborne Association's approach to survey administration

The Osborne Association's process for monitoring survey completion

What are your questions for The Osborne Association?

/ **Enter your questions into the chat or ask Steuben and Sharon aloud!**

Identifying potential data quality issues

Review survey response patterns

/ **Monitor the number of clients who answer each survey question and patterns in their responses**

/ **Start by reviewing the Survey Completion Summary operational report to identify the total number of clients who submitted an ACS, Entrance and Exit survey**

/ **Then drill down on response patterns using Sections C-02 (Applicant Characteristics) and C-09 (Participant Outcomes) of the PPR and the Client Outcomes tab of the query tool**

Monitor survey item response rates

/ **Use the survey PDFs and data export to identify how many clients should have responded to each survey and question before analyzing survey response data**

/ **Identify whether the number of responses is lower than expected**

/ **Investigate root causes and develop strategies to address non-response patterns**

ENTRANCE OUTCOME	RANGE	NUMBER OF INDIVIDUAL CLIENTS	Average Score/Percent
How often accepts child the way he or she is	1 (always) to 5 (never)	98	1.1
Feels they and their child understand each other	1 (always) to 5 (never)	99	1.7
Hits, spanks, grabs, or uses physical punishment	1 (yes); 0 (no)	98	6.1
Yells, shouts, or screams at child when he/she is mad at him...	1 (yes); 0 (no)	96	9.4
Talks about what child did wrong	1 (yes); 0 (no)	98	61.2
In past month, saw child every day or almost every day (%)	0 - 100	10	14.9
In past month, saw child one to three times a week (%)	0 - 100	23	34.3
In past month, saw child one to three times a month (%)	0 - 100	31	47.8
In past month, did not see child (%)	0 - 100	2	3.0
I would like to learn new job skills	1 (strongly agree) to 4 (strongly disagree)	206	1.5
I feel confident in my ability to conduct an effective job sear...	1 (strongly agree) to 4 (strongly disagree)	209	1.9
Believes that it is better for children if their parents are marr...	1 (strongly agree) to 4 (strongly disagree)	218	1.8
Believes that living together is just the same as being married	1 (strongly agree) to 4 (strongly disagree)	217	2.4
Satisfaction with current relationship	1 (very satisfied) to 3 (not satisfied)	61	1.7

Check for unexpected response trends

/ **Consider whether client responses might not be an accurate reflection of the clients' characteristics or experiences**

/ **Unexpected patterns may indicate an underlying issue in the way clients are interpreting or perceiving a question**

  - Clients may also be concerned about how they answer a question

Use the Survey Response Data tab of the data export to conduct more in-depth reviews of survey data

Example: Unexpected ACS responses on challenges to finding a job

/ **A grantee notices that the responses clients are providing on the ACS about challenges to finding or keeping a job do not align with the challenges clients discuss during workshop sessions and individual service contacts**

/ **After investigating further, they learn that workshop facilitators were skilled at making clients comfortable with sharing sensitive information, but the survey scripts did not address this topic**

/ **As a next step, the grantee will need to identify ways to modify their survey scripts and other survey administration materials and processes**

Improving survey response rates, completion rates, and data quality

Survey scripts

/ **Explain each survey's purpose and benefits**

/ **Provide step-by-step instructions on how to submit surveys**

/ **Ask clients whether they have any questions**

/ **Address potential client questions and concerns**

- For example, emphasize confidentiality if clients express concerns about privacy
- Remind clients that they can listen to the recording of a question if they find that helpful

/ **Review the [Tips for Survey Scripts](#) resource for an example and more information on how to tailor scripts**

Adapting survey administration processes

/ **Consider addressing challenges in response and completion rates by switching to another survey administration mode**

- For example, implementing a process for completing surveys in-person rather than virtually

/ **Review the tip sheet on Options for Administering Surveys Virtually for more detailed information about ACF-approved options**

/ **Discuss any proposed changes to survey administration processes with your FPS and ETAP (for grantees conducting local evaluations) before implementing changes**

nFORM TA resources on survey administration

Key survey administration resources

nFORM 2.0 User Manual	Performance Measures and Data Collection Logistics Manual	Data Collection Plan Template	Tips for Survey Scripts
Survey PDFs	HMRF Performance Measures Sources	Using nFORM 2.0 for Local Evaluations	November and December 2022 nFORM Office Hours

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Coming soon: survey administration infographic

Will include strategies for monitoring and improving survey administration and data quality

Questions?