

Using an equity-centered approach to program monitoring with nFORM 2.0

January 9, 2024
nFORM 2.0 Team
Mathematica

OFFICE OF FAMILY ASSISTANCE

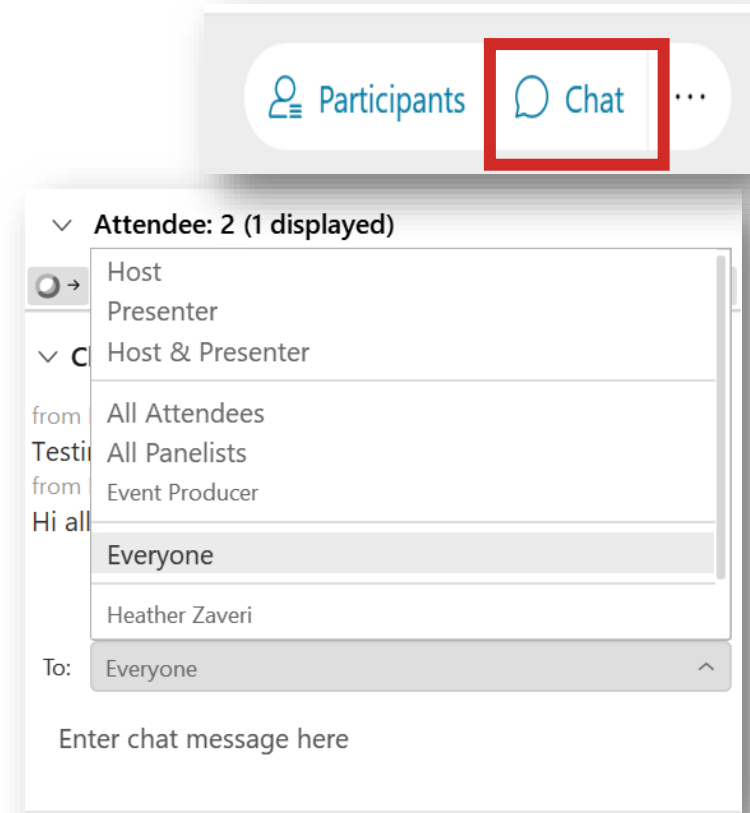
An Office of the Administration for Children & Families





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 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

- / Considering equity in program monitoring**
- / Applicant characteristics data in nFORM**
- / nFORM data tools for monitoring**
- / Deep dive: Using nFORM to analyze trends in applicant characteristics**
- / Announcements**



Considering equity in program monitoring



New equity-related activities question on the QPR and PPR progress narrative templates

- / ACF recently added a new question to the progress narrative templates that asks grantees to describe any activities that they or their subrecipients conducted during the reporting period to address or advance equity**
- / Updated templates available in nFORM and the HMRF Grant Resources site**
- / Grantees will receive a FED Talk and email announcement soon with more information**



What does it mean to use an equity-centered approach in program monitoring?

- / ACF defines equity as “the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment”**
- / Grant recipients can use nFORM data to identify whether they are enrolling and serving target demographic groups**
 - Can also identify whether client outcomes vary by subgroups

Source: Office of Family Assistance, Healthy Marriage and Responsible Fatherhood Grant Program Performance Progress Report and Quarterly Performance Progress Report (QPR Narrative Section A-02.7; PPR Narrative Section B-02.17)



How would you like to use data to understand disparities in your program?

To address the gaps in service

Average duration father is part of our program

What populations are we not serving, who due to barriers needs our services and are not receiving them

Understand the disparities among fathers who may have disabilities. Also, military or veteran populations

Completion rates



What types of nFORM data can we use to monitor potential disparities?

/ **Clients' responses to the applicant characteristics, entrance, and exit survey responses**

- Applicant characteristics such as gender, age, ethnicity, etc.
- Client outcomes related to topics such as relationships/marriage, parenting, economic stability, and program perceptions

/ **Other information collected by program staff**

- For example, location and referral source

/ **Workshop participation**

/ **Individual service delivery**

Follow-up nFORM office hours on monitoring potential disparities in service delivery to come!



Applicant characteristics data in nFORM



The applicant characteristics survey asks about...

/ **Gender**

/ **Age**

/ **Ethnicity**

/ **Race**

/ **Public assistance**

/ **Education**

/ **Employment**

/ **Partner status**

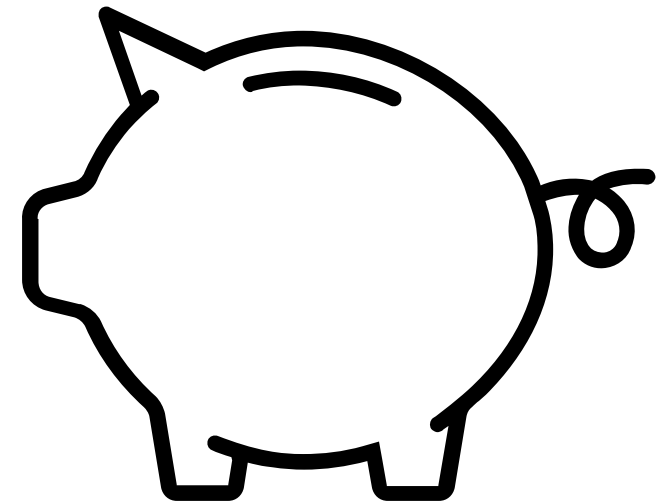
/ **Number of children**

/ **Referral source and reason for enrollment**



Entrance and exit surveys include select demographic questions as well

- / **Fatherhood FIRE and FRAMEWorks surveys also ask questions about partner status and children**
- / **Some questions provide additional indicators of economic stability**
 - For example, the entrance and exit surveys ask clients whether they have a checking and savings account and how often they find it difficult to pay their bills





Program staff enter other demographic information in a client's profile

Client Information Edit

Application Date 1/22/2021

Population Adult individual

Grantee Location Westside

Date of Birth 9/24/1979

Gender Male

Applicant has been screened for intimate partner violence or teen dating violence.

Contact Information

(565) 849-3098

jj@gmail.com

Address

Address 1 - Primary

100 Anytown Lane
Apt 2
Anywhere PA 25356

Referred By:

Type Healthy Start

Name Main Street Healthy Start

Program staff are required to enter a client's address and referral source during enrollment, and should provide information about the location where they will receive services and the name of the referring organization (if applicable)



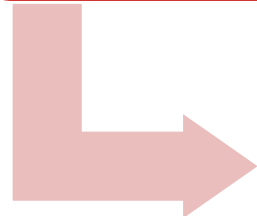
nFORM data tools for monitoring



Which data tools can we use to monitor the distribution of applicant characteristics?



- Sections C-02.1 – C-02.3



- Enrollment and Applicant Characteristics tabs; Filters



- Survey completion summary and zip code reports



- Survey Response Data tab



Review client demographics in Sections C-02.1 – C-02.3 of the PPR and School Year Performance Report

- / Includes all enrolled clients during the reporting period who provided an applicable response to each question on the applicant characteristics survey**
- / Ready4Life grant recipients that offer services in school settings can review demographics using the School Year Performance Report**



Query tool options for monitoring applicant characteristics

/ **Many query tool tabs include filters and data visualizations on subgroups**

Enrollment:
Referral source and primary reason for enrolling

Applicant Characteristics:
Filter on select characteristics

All Workshops:
Workshop participation by race and gender (HM) or race and age (RF)

Client Outcomes:
Filter on client characteristics to review select survey outcomes

Enrollment tab

Grant Year Overview | **Enrollment** | Applicant Characteristics | Individual Services | Workshop Participation - All Workshops | Workshop Participation - Primary Workshops | Client Outcomes

Cloud Grantee 1 RF (LE)

Calendar Year: 2020 | 2021 | 2022 | Jan Jul | Feb Aug | Mar Sep | Apr Oct | May Nov | Jun Dec

Community individual | Community couple | Reentering individual

Current Selections
Grantee Name: Cloud Grantee 1 RF (LE)

Analyze enrollment trends by grantee location, how enrollees heard about services, reason for enrolling, and selected time frames. This tab displays data for all client populations served by the grant. Grantees that serve multiple populations can view data for each population by selecting the applicable buttons above. Selecting specific years or months will display characteristics for that time frame.
For couple populations, enrollment by grantee location is counted for the couple; how applicants heard about services and their reasons for enrolling are counted by individuals. For grantees conducting local evaluations, data displayed on this tab are for treatment, control (with services), and control waitlist (with services) group clients only.

Grant Year	Enrollment Target	Enrollment to Date	Percent of Target Enrolled
2022	480	437	91.0%
2021	450	22	4.9%

Number of Clients Enrolled by Grantee Location, by Month

Month	Not specified	Southeast Side
Jan	0	0
Feb	0	1
Apr	0	1
Jun	0	1
Jul	5	0
Aug	5	0
Sep	12	0
Oct	60	58
Nov	60	81
Dec	0	25

Filter by enrollment date

Filter by population type

Filter by location, which adjusts all three bar charts

How Applicants Heard About the Program

Source	Percentage
Word of mouth (friends, family, neighbors)	28%
Community organization, such as church or synagogue	22%
Program staff in the community	18%
Other	15%
Newspaper ad, billboards, or radio ad	15%
Radio ad or a TV spot	13%
Internet ad or social media search	12%
Government agency, such as a job training center	8%
Program offered in prison or jail	5%
My school offered the program	5%

Primary Reasons for Enrolling

Reason	Percentage
To learn about being a better parent	35%
To find a job or a better job	12%
To learn how to improve my life	10%
My spouse/partner asked me to enroll	8%
My friends were coming	7%
To meet a school requirement	5%
A court ordered me to enroll in this program	3%
My parole/probation officer told me to enroll	2%

Applicant Characteristics Tab

Grant Year Overview | Enrollment | **Applicant Characteristics** | Individual Services | Workshop Participation - All Workshops | Workshop Participation - Primary Workshops | Client Outcomes

Cloud Grantee 1 RF (LE)

Calendar Year: 2020 | 2021 | 2022 | Jan Jul | Feb Aug | Mar Sep | Apr Oct | May Nov | Jun Dec

Community individual | Community couple | Reentering individual

Filter by population type

Filter by enrollment date

Current Selections

Grantee Name Cloud Grantee 1 RF (LE)

Population Name Community individual

Characteristic Age

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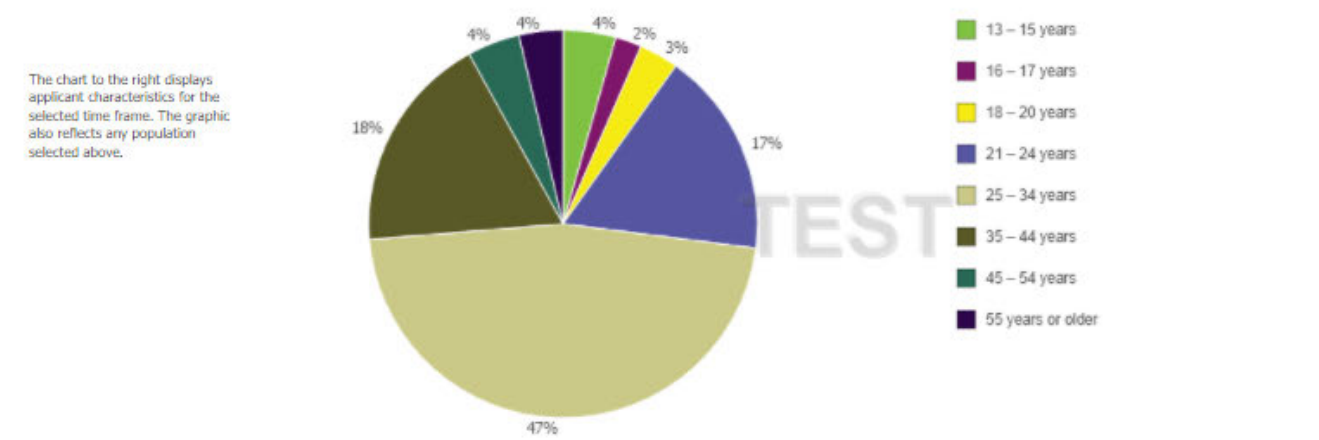
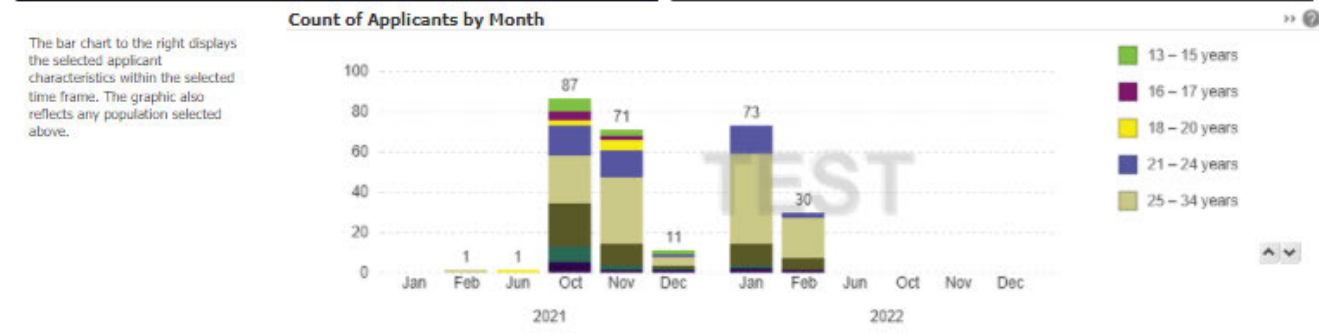
Characteristic

- Age**
- Employment Status
- Ethnicity
- Gender
- Partner Status
- Race

Filter by applicant characteristic (as reported from ACS responses)

Analyze applicants by selected characteristics and time frames. Select characteristics of interest from the menu at left. Select specific calendar years or months above to display characteristics for that time frame. This tab displays data for all client populations served by the grant. Each partner in a couple is counted separately on this tab since data are based on individual survey completion. For grantees conducting local evaluations, this tab displays data for clients in all service assignments; other tabs in the query tool only display data for treatment, control (with services), and control waitlist (with services) group clients. Grantees that serve multiple populations can view data for each population by selecting the applicable buttons above.

APPLICANT CHARACTERISTICS | **APPLICANT CHARACTERISTICS BY SERVICE ASSIGNMENT**



Current Selections
 Grantee Name: Cloud Grantee 1 RF (LE)
 PopulationName: Community individual
 Characteristic: Age

- Characteristic
- Age
 - Employment Status
 - Ethnicity
 - Gender
 - Partner Status
 - Race

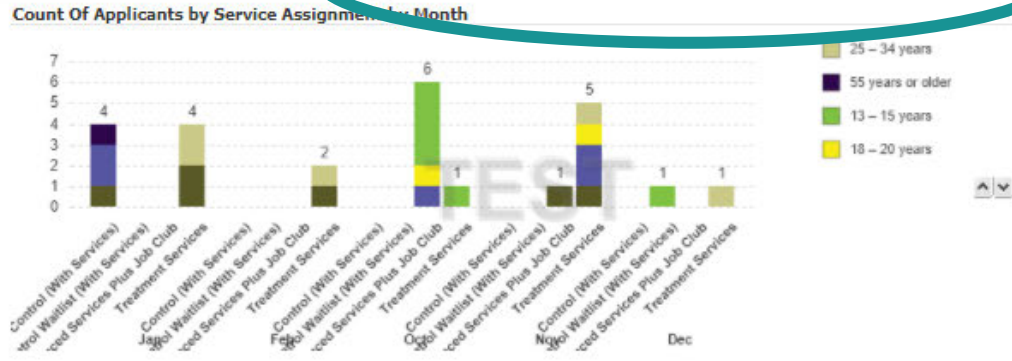
Filter by enrollment date

Filter by applicant characteristic (as reported from ACS responses)

Applicant Characteristics by Service Assignment

Analyze applicants by selected characteristics and time frames. Select characteristics of interest from the menu at left. Select specific calendar years or months above to display characteristics for that time frame. This tab displays data for all client populations served by the grant. Each partner in a couple is counted separately on this tab since data are based on individual survey completion. For grantees conducting local evaluations, this tab displays data for clients in all service assignments; other tabs in the query tool only display data for treatment, control (with services), and control waitlist (with services) group clients. Grantees that serve multiple populations can view data for each population by selecting the applicable buttons above.

APPLICANT CHARACTERISTICS BY SERVICE ASSIGNMENT



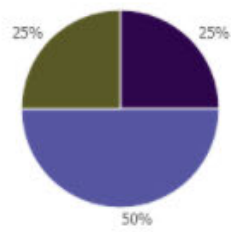
Filter by population type

Filter to view by service assignment

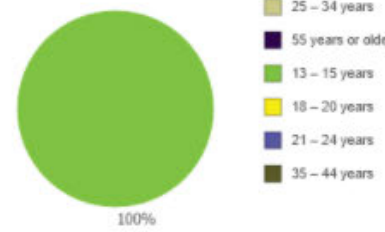
Use information on this tab to assess whether characteristics of treatment and comparison group clients appear similar. Use the Data Export function to produce a data file for statistical testing. The information on this tab cannot be used to determine baseline equivalence because it has not been tested for statistical significance. The bar chart to the right displays applicant characteristics by service assignment within the selected time frame; the graphics also reflect any population selected by the grantee above.

The charts to the right display selected applicant characteristics by service assignment for the selected time frame. The graphics also reflect any population selected by the grantee above.

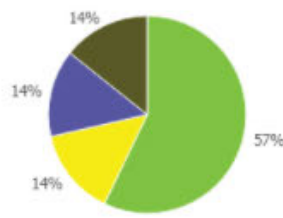
Control (With Services)



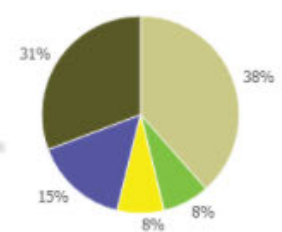
Control Waitlist (With Services)



Enhanced Services Plus Job Club



Treatment Services





Workshop Participation – All Workshops tab

Grant Year Overview Enrollment Applicant Characteristics Individual Services **Workshop Participation - All Workshops** Workshop Participation - Primary Workshops Client Outcomes

Grantee 1 HM (LE)

Analyze client participation in workshops since the beginning of the grant by selecting specific workshops from the list below. This tab displays data for all client populations served by the grant; grantees that serve multiple populations can view data for each population by selecting the applicable buttons to the right. Healthy Marriage grantees can analyze workshop attendance by gender and race. Responsible Fatherhood grantees can analyze workshop attendance by age and race. Individual make-up sessions of workshops are excluded from these analyses. For couple populations, attendance is counted only if both partners attend. Key characteristics are counted for individual attendees. For grantees conducting local evaluations, data displayed on this tab are for treatment, control (with services), and control waitlist (with services) group clients only.

Adult couple **Adult individual**

Current Selections

Grantee Name Grantee 1 HM (LE)

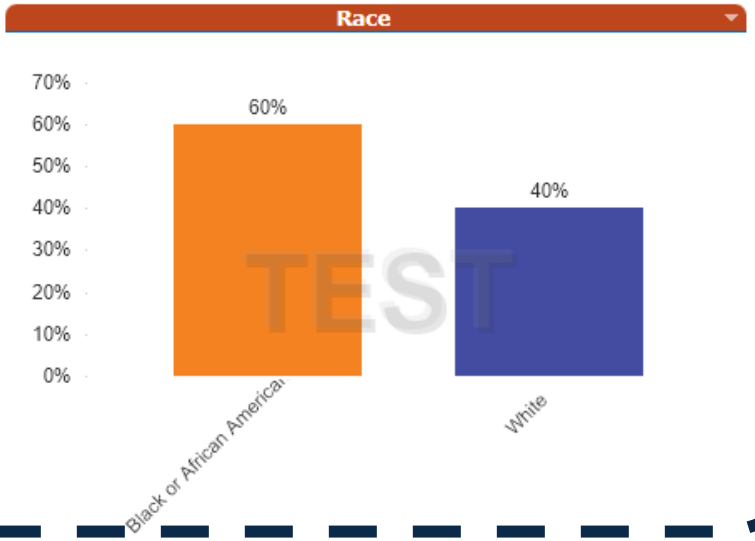
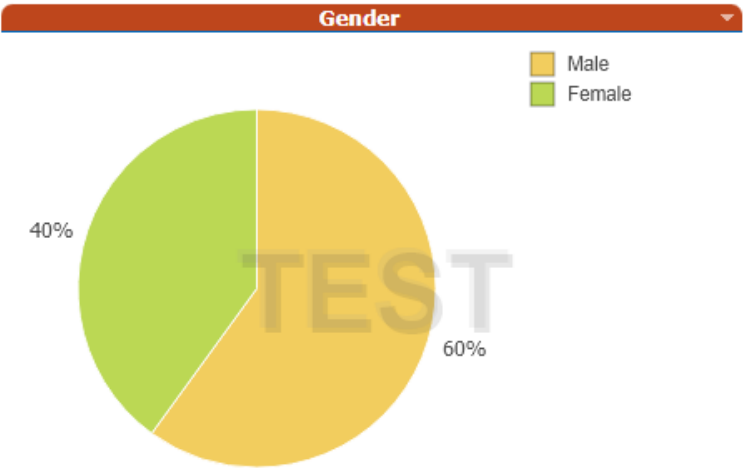
PopulationNa... Adult couple

4 Clients Attended at Least One Workshop Session

1 Average Number of Clients in Each Workshop Session

5.9 hours Average Number of Hours Clients Attend Workshops (Of Clients Who Attended Workshops)

KEY CHARACTERISTICS OF ATTENDEES (For Workshop Attendees Who Reported These Characteristics)



< Clear Selections >

Workshop Series

Filter by workshop and series

Filter by population type



Generate operational reports for information on enrollment by location

- / **Monitor enrollment by location using the Survey Completion Summary report**
- / **Review the total number of clients living within each zip code using the Zip Code Summary operational report**

Client Grantee Location	Population	Zip Code	# Clients
Northside	Community individual	7777	1
Eastside	Community couple	10001	5
Eastside	Community couple	10002	2



Use the data export for in-depth analyses of demographic trends

- / Access all client applicant characteristics, entrance and exit survey data on the Survey Response Data tab**
 - Use the data to review the distribution of clients within a group (i.e. ethnicity) by a select demographic variable (i.e. gender)
- / Monitor client-level information on referral sources and organizations using the Client Info tab**
- / Refer to the data dictionary for the meanings of each variable and data export template for tips on how to use the export**



Questions?



Deep dive: Using nFORM to analyze trends in applicant characteristics



Use the data export to monitor demographic trends

Analysis goal: To identify the number and percentage of Adult Individual clients enrolled by ethnicity then gender, and determine whether additional outreach is needed to increase enrollment within a select group

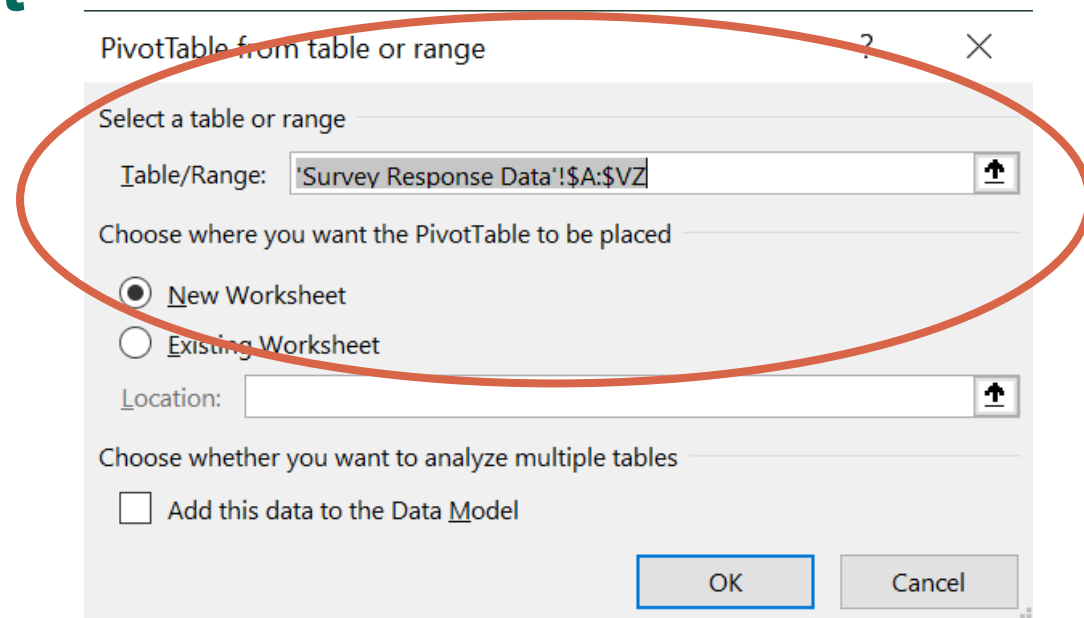
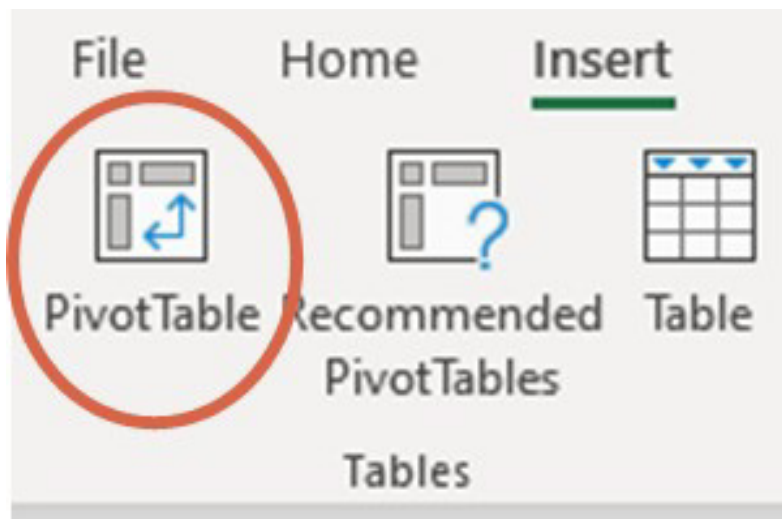
/ **Analysis overview**

- Use the Survey Response data tab of the data export to create a pivot table that shows the number of Adult Individual clients enrolled by ethnicity, then gender
- Determine whether additional or tailored recruitment and marketing is needed to increase enrollment in a specific group in the target population



Analysis steps

- / **Step 1: Generate an up-to-date version of your grant's data export and save it to a secure local folder**
- / **Step 2: Navigate to the Survey Response data tab and insert a pivot table on a new worksheet**

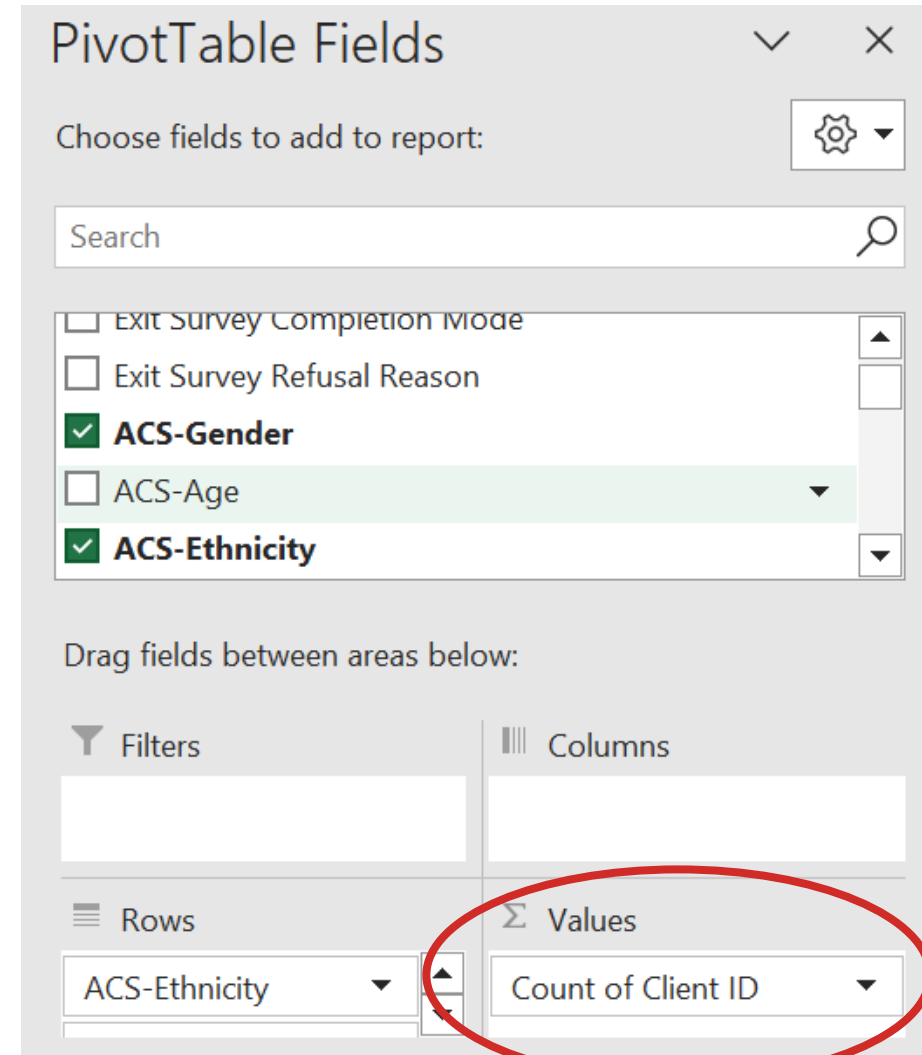




Analysis steps (cont.)

/ Step 3: First add “ACS-Ethnicity” to the Rows field, then add “ACS-Gender” to the Rows field underneath “ACS-Ethnicity”, and Client ID to the Values field

- Make sure that the table shows a count of client IDs rather than a sum by left-clicking in the Values field on the client ID field and selecting “Count”

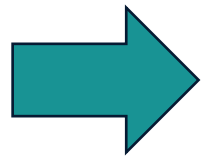




Analysis steps (cont.)

- / **Step 4: Relabel variables from numeric values to their meaning**
- / **Step 5: Review the pivot table data to understand who is enrolling**

Row Labels	Count of Client ID
1	26
1	8
2	7
4	4
(blank)	7
2	48
1	15
2	20
4	6
(blank)	7



	Number of Clients
Hispanic or Latino	26
Female	8
Male	7
Other	4
(blank)	7
Not Hispanic or Latino	48
Female	15
Male	20
Other	6
(blank)	7



Take your analysis a step further by including another variable

/ Step 6: To identify which partners are providing the greatest number of referrals for Adult Individuals, insert a new column to the right of “Client ID” on the Survey Response Data tab and label the column “Referral Organization”

Client ID	Referral Organization	Couple ID	Office Location	Program
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Additional analysis steps (cont.)

/ Step 7: Use a formula to merge the “Referral Organization” from the Client Info tab into the Survey Response Data tab’s new “Referral Organization” column

=VLOOKUP('Survey Response Data'!A2,'Client Info'!A:K,11,FALSE)

R4L grants replace
“11” with “10”



Additional analysis steps (cont.)

- / **Step 8: Refresh the pivot table tab so that “Referral Organization” appears in the list of available fields**
- / **Step 9: Add “Referral Organization” to the bottom of the list of variables in the Rows field**
- / **Step 10: Review the new pivot table to understand which organizations are referring clients**

	Number of Clients
Hispanic or Latino	26
Female	8
Central Church	1
Downtown Community Center	4
Main Street Head Start	3
Male	7
Downtown Community Center	7
Other	4
Downtown Community Center	4
(blank)	7
Downtown Community Center	7
Not Hispanic or Latino	48
Female	15
Central Church	1
Downtown Community Center	13
Hannah's Haven	1
Male	20
Downtown Community Center	13
Hannah's Haven	4
Main Street Head Start	3
Other	6
Downtown Community Center	6
(blank)	7
Downtown Community Center	7



Example of using nFORM data to discuss equity in the new progress narrative question

7. Equity-related activities

Please describe any activities you or your subrecipients conducted during the reporting period to address or advance equity as part of this project.

The term “equity” means the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment, such as Black, Latino, and Indigenous and Native American persons, Asian Americans and Pacific Islanders and other persons of color; members of religious minorities; lesbian, gay, bisexual, transgender, and queer (LGBTQ+) persons; persons with disabilities; persons who live in rural areas; and persons otherwise adversely affected by persistent poverty or inequality. Use additional pages if needed.

Since our program design includes a goal of enrolling at least 50% of our Adult Individual population from Hispanic or Latino communities, we identified that we were facing a challenge in meeting this goal. We conducted an nFORM analysis and identified that only about a third of all clients identify as Hispanic or Latino. Upon further review, it appears that we have enrolled a nearly equal number of Hispanic or Latino men and women, with the most common referral organization being a local community center. During the reporting period we held a meeting with staff from the community center to better understand the needs and concerns of this community, and collaborated on ways to tailor marketing materials and messaging to increase enrollments both at the community center and other organizations that serve our target population.

Programs can use nFORM data to understand and explain the nature of a challenge and strategies to address the challenge

What are your tips?

What recommendations, tips, or considerations do you have for using nFORM to understand potential disparities in your program?

Add your thoughts or suggestions to the chat, or let us know if you would like to share aloud!





Announcements



nFORM query tool updates coming soon!

/ **On the Grant Year Overview tab...**

- An updated client participation panel with information on substantive service contacts, optional workshop participation, and progress towards current grant year primary workshop targets to align with PPR Section C-04.2b Table 2
- Updated labels and legends for entrance and exit survey status, referral follow ups, and sessions pending attendance in the data quality panel

/ **On the Workshop Participation – Primary Workshops tab....**

- Revising Count of Clients Reaching Benchmark bar chart so that initial attendees appear first (instead of fully finished clients)

/ **The nFORM Help Desk will email nFORM users as soon as these updates are available**



Resource updates and office hours

/ Check out the **HMRF Grant Resources QPR/PPR pages** and the **[Progress Narrative Tip Sheet](#) for updates on accessing the new templates**

- Instructions for downloading the PDF and Word templates have been updated for both the [Healthy Marriage](#) and [Responsible Fatherhood](#) versions

/ **Save the date for upcoming office hours**

- CQI office hours on Tuesday, January 23 from 2-3pm ET
- nFORM office hours on Tuesday, February 13 from 2-3pm ET





Questions?

