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HMRF
HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

U.S. Department of Health and Human Services
ADMINISTRATION FOR
CHILDREN & FAMILIES

Performance Measures, nFORM, and Continuous Quality Improvement

June 9, 2020

Today's speakers

Seth Chamberlain
HMRF Branch Chief

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Mathematica

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Today’s webinar

- What are performance measures, and what are grantees’ responsibilities for them?
- What is nFORM, and how will grantees use it?
- What is CQI, and why is it important?
- How will grantees report their performance to the Office of Family Assistance (OFA)?

Performance measures

What are performance measures?

- Indicators or measurements of progress and achievements
  - Program operations
  - Applicant characteristics
  - Client participation
  - Client outcomes

How are the performance measures used?

- Track programming outputs and outcomes
- Inform continuous quality improvement (CQI)
- Cross-site analysis

Performance measure requirements

- Grantees are required to collect, store, and report data on standardized performance measures in four areas:
    - Applicant characteristics
    - Service delivery (enrollment and participation)
    - Client outcomes
    - Program operations
- Grant applicants must describe:
    - How they will systematically collect the data
    - How prepared they are to collect performance measure data
        - Including staff qualifications and training, and specific staff who will be responsible for data collection, such as a data manager
    - How they will maintain client privacy
    - Whether and how key stakeholders were consulted in the data collection plans

Four types of performance measures

Applicant Characteristics

Demographics

Reasons for enrolling

Client Outcomes

Entrance outcomes

Exit outcomes

Service Delivery

Enrollment

Workshop participation

Individual services

Referrals

Incentives

Program Operations

Outreach

Staffing

Implementation challenges

Clients take three surveys

Applicant Characteristics Survey

- At intake
- Completes enrollment process

Entrance Survey

- At beginning of first workshop session

Exit Survey

- At the end of the last workshop session, OR
- 28 days after completing the Entrance Survey for shorter programs

Surveys are tailored to the HMRF populations

Healthy Marriage

- Adult individuals
- Adult couples
- Youth

Responsible Fatherhood

- Community fathers
- Community couples
- Reentering fathers

Topics in the Applicant Characteristics Survey

Demographic characteristics	Financial well-being	Family status	About the program
• Gender • Age • Race • Ethnicity	• Household assistance • Living situation • Education level • Employment status • Earnings	• Marital status • Number of children • Foster care status	• How client heard about the program • Reasons for enrolling

Topics in the HM Entrance and Exit Surveys

Adult Individuals and Couples	Youth
• Parenting • Job and career advancement • Personal development • Healthy marriage and relationships • Program perceptions	• Attitudes about marriage and relationships • Attitudes about sex • Relationship skills • Program perceptions

Topics in the RF Entrance and Exit Surveys

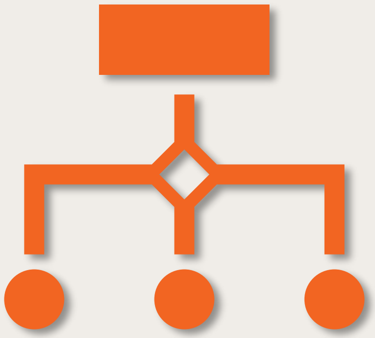
Community Fathers and Community Couples	Reentering Fathers
• Parenting and co-parenting • Economic stability • Relationships/marriage • Personal development • Program perceptions	• Parenting and co-parenting • Economic stability • Relationships/marriage • Personal development • Program perceptions

Grantees provide enrollment and services data

- Enrollment numbers
- Workshop participation
  - Primary workshops
  - Optional workshops
- Case management
  - Service contacts
  - Referrals
  - Incentives

Program operations

- Each quarter of the fiscal year, grantees will be asked for information on program operations
  - Outreach and recruitment activities
  - Staff characteristics and training
  - Staff supervision and observation
  - Implementation challenges



Topics on the Program Operations Survey

Mass Marketing, Outreach, and Recruitment

- Types of advertising
- Recruitment methods
- Referral agencies and organizations
- On-site recruitment sources
- Recruitment staffing
- Staff turnover

Staff Characteristics

- Education level
- Years in role
- Demographics

Quality Assurance and Monitoring

- Curricula training
- Other training
- Workshop observation
- One-on-one supervision
- Staff meetings

Implementation Challenges

- Challenge areas

How were the HMRF performance measures selected?

- OFA selected measures that:
  - Were successfully used in prior studies with similar populations, whenever possible
  - Are appropriate for populations typically served by RF and HM programs
  - Are free and publicly available
  - Clients can respond to themselves (no interviewer needed)
  - Have good statistical properties, such as reliability and validity

Improving performance measures for the 2020 cohort of HMRF grantees

- Synthesized feedback and analysis of current measures
  - Public comment period
  - Listening sessions with staff from current grantees, experts in the field, and ACF stakeholders
  - Analysis of item missing rates, ceiling or floor issues, response variation, usability of open-text field data, outlier or illogical responses
- Systematically reviewed feedback and analysis to inform changes
- Pre-tested revised and new items with clients of current HMRF grantees
- Refined items based on pre-test findings

Performance measure enhancements

- Clarified and aligned question or item wording with grant programs and clients' experiences
- Modified response categories to address cases in which survey items did not fully capture clients' experiences
- Replaced some measures with alternatives suggested by stakeholders
- Dropped unnecessary items
- Added new questions or items

Next step: OMB review

- ACF will submit the draft instruments to the Office of Management and Budget (OMB) for review and approval before collecting data
- As part of that process, ACF will publish a Federal Register Notice inviting public comment on the instruments and measures
- The instruments might change based on the feedback received during the OMB process

Data collection and nFORM

nFORM supports data collection and reporting for HMRF grantees

- nFORM = Information, Family Outcomes, Reporting, and Management
- A web-based management information system designed for OFA's HMRF grantees
    - Can collect and store all data required for reporting to OFA
    - Produces report calculations with one click
    - Includes data tools, reports, and data export

nFORM overview

- Web-based, no download or programming required
- Free to OFA grantees
- Section 508 compliant
- Available anywhere with Internet connection
  - Use jetpacks in places without Internet
- Real-time data collection and access to reports and data tools

nFORM works on multiple platforms

Compatible with desktop computers, laptops, or tablets

Tested with PC, iPad, and Samsung Galaxy tablet

Optimized for Google Chrome

nFORM security

- Compliance with Federal Information Security Management Act
- Data-sharing agreements with grantees
- User access limited by number of accounts and account types
- Multifactor authentication: password + text or phone call
- Strong passwords (at least 8 characters, letters, numbers, special characters)
- Change password every 60 days
- User name is email address, one account per email address
- Limited number of log-in attempts
- Must log in again after 15 minutes of inactivity

nFORM enhancements for next cohort

- Feedback from stakeholders and best practices in data collection informed the changes
- Changes to improve user experience, access to data and reports, and data quality while adhering to security requirements
- Highlights include:
  - Programming more bulk update functions to make data entry and survey administration easier and faster
  - Adding data quality measures to the query tool
  - New and improved operational reports and data export

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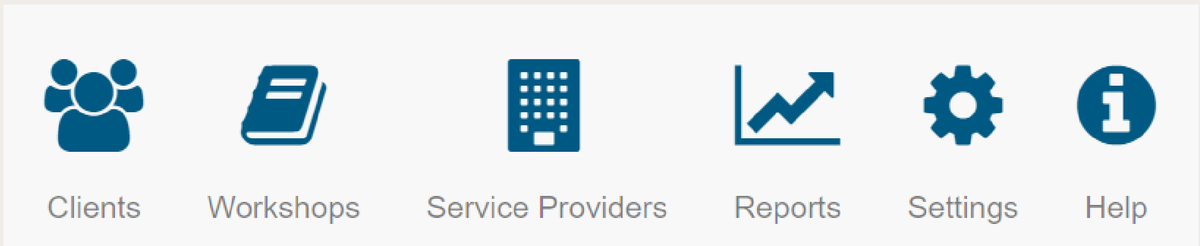
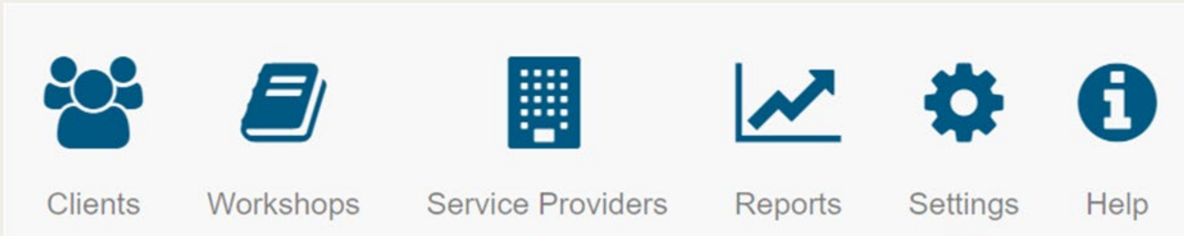
Key features of nFORM



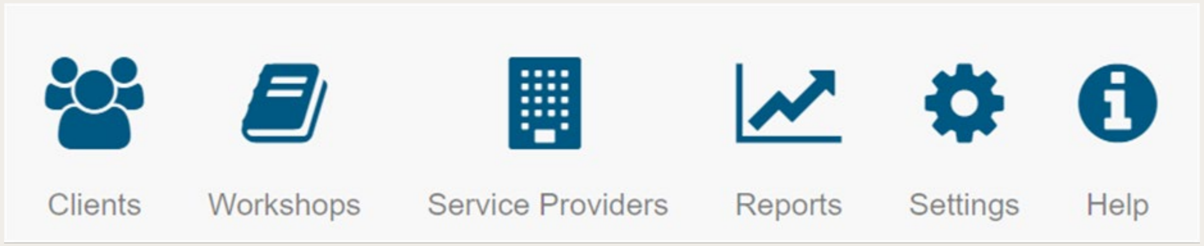
- All data collection and reporting features are found in nFORM's menu of tabs
- Let's look at a few highlights...

Grantee administrative features



- Add and manage user accounts
- Enter grantee locations
- Set up service assignments

Service provider directory



Create, manage, and search a grantee-specific directory of other agencies that can provide services to clients (e.g., referrals)

Users can easily search a directory of providers

Service Providers

Search Criteria

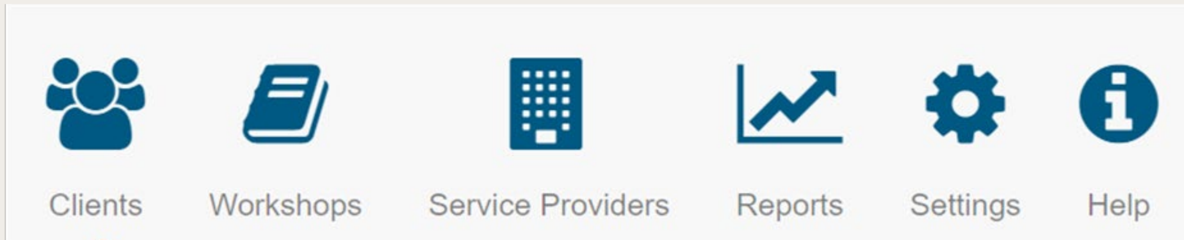
+ Add Service Provider

Items per page 10

View	Name	Services	Contact	Phone	Email	Partner Agency
View	Americorps	Employment resources	Michael Smith		msmith@aaa.com	-
View	Family Care Center	Medical/Dental/Wellness, Mental Health Referral, Substance Abuse Referral	John Golden	(732) 444-5886		-
View	New Jersey Workforce Center	Career planning, Employment resources, Job search assistance, Resume development	John Contact1	(908) 555-1313		Yes
View	Salvation Army	Clothing (not job related), Housing/Rent Assistance	Tom Jones	(732) 444-1212		-
View	The Main Street Center for Responsible Fatherhood and Healthy Relationship Programming	Child support arrearages assistance, Child Welfare Services Involvement, Couple mediation, Domestic Violence/Intimate Partner Violence, Establish paternity, Establish/modify child custody order, Establish/modify child support order, Establish/modify child visitation order, Establish/modify parenting plan, Family Therapy/Counseling Referral, Healthy Marriage and Relationship Education Services, Parenting	None None	(555) 555-5555		Yes

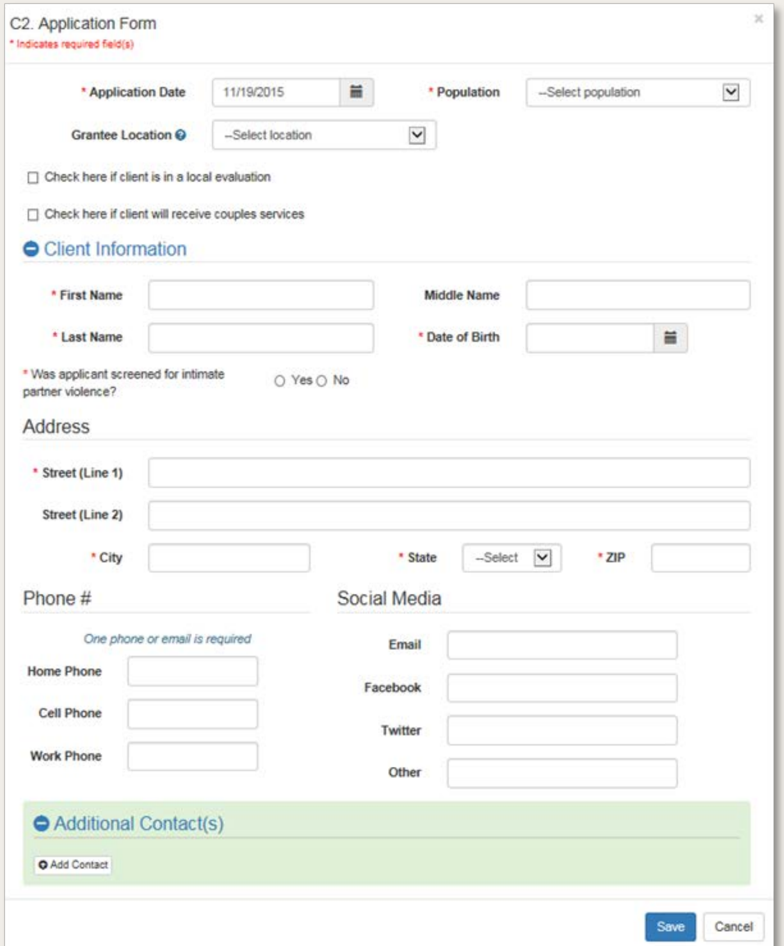
5 Record(s)

Add and track clients



- Complete application form
- Administer client surveys
- Track individual services
- Assign case managers
- Track client statuses

Complete the application form to create a client profile in nFORM


C2. Application Form
* Indicates required field(s)

* Application Date 11/19/2015
* Population --Select population
Grantee Location --Select location

Check here if client is in a local evaluation
Check here if client will receive couples services

Client Information

* First Name
Middle Name
* Last Name
* Date of Birth
* Was applicant screened for intimate partner violence? Yes No

Address

* Street (Line 1)
Street (Line 2)
* City
* State --Select
* ZIP

Phone #

One phone or email is required
Home Phone
Cell Phone
Work Phone

Social Media

Email
Facebook
Twitter
Other

Additional Contact(s)

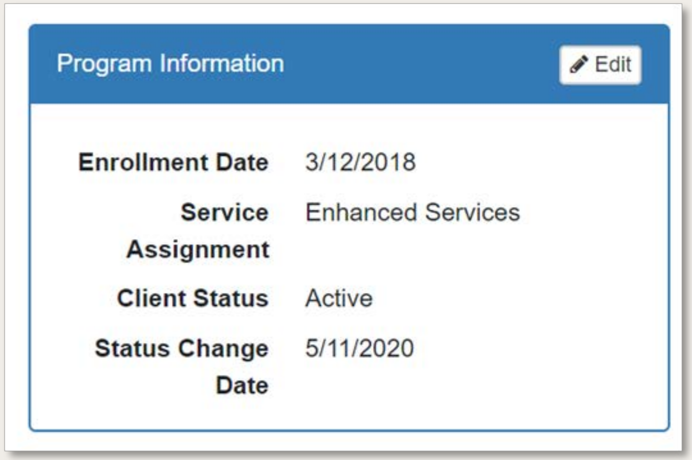
Add Contact

Save Cancel

- Clients are “enrolled” once they have completed the Applicant Characteristics Survey
- Easily access information on the application form—including contact information and additional contacts—from the client profile

Document individual services and monitor client flow from the client profile

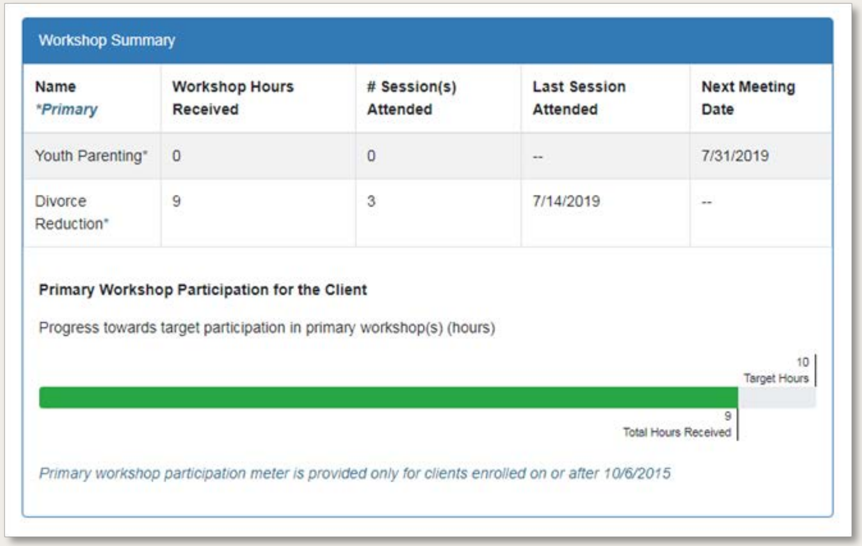
- Record individual services, referrals, and incentives
- Manage client status to track program flow
- See individual client workshop participation and progress towards target hours



Program Information

Edit

Enrollment Date	3/12/2018
Service Assignment	Enhanced Services
Client Status	Active
Status Change Date	5/11/2020



Workshop Summary

Name *Primary	Workshop Hours Received	# Session(s) Attended	Last Session Attended	Next Meeting Date
Youth Parenting*	0	0	--	7/31/2019
Divorce Reduction*	9	3	7/14/2019	--

Primary Workshop Participation for the Client

Progress towards target participation in primary workshop(s) (hours)

Primary workshop participation meter is provided only for clients enrolled on or after 10/6/2015

Grantee staff launch client surveys from nFORM

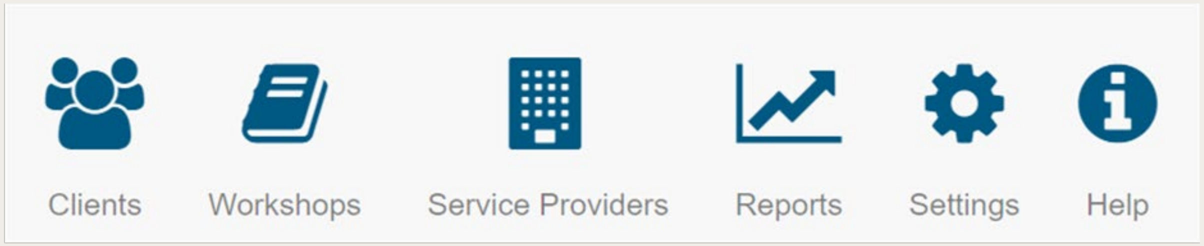
- Surveys only become available in the correct order
- Self-administered (no interviewers)
  - Programmed into nFORM, which directs client to the appropriate survey and questions based on previous responses
  - Can be completed on desktop computer, laptop, or tablet
- Will offer optional audio computer-assisted self-interview (ACASI) technology
  - Client may listen to questions instead of reading them, alleviating literacy concerns
- Available in English and Spanish

Special survey scenarios

- Youth in high schools
  - Determine whether school and parental consent is required
  - Plan for administering surveys in groups
  - Ensure you can access the school's Internet, and there is enough bandwidth to administer surveys in groups
- Fathers in correctional facilities
  - Determine if you need to give the survey on paper or by telephone
- Locations without Internet
  - Consider using jetpacks

Training and targeted technical assistance (TA) after grant awards will cover strategies for collecting data in special scenarios

Manage workshops

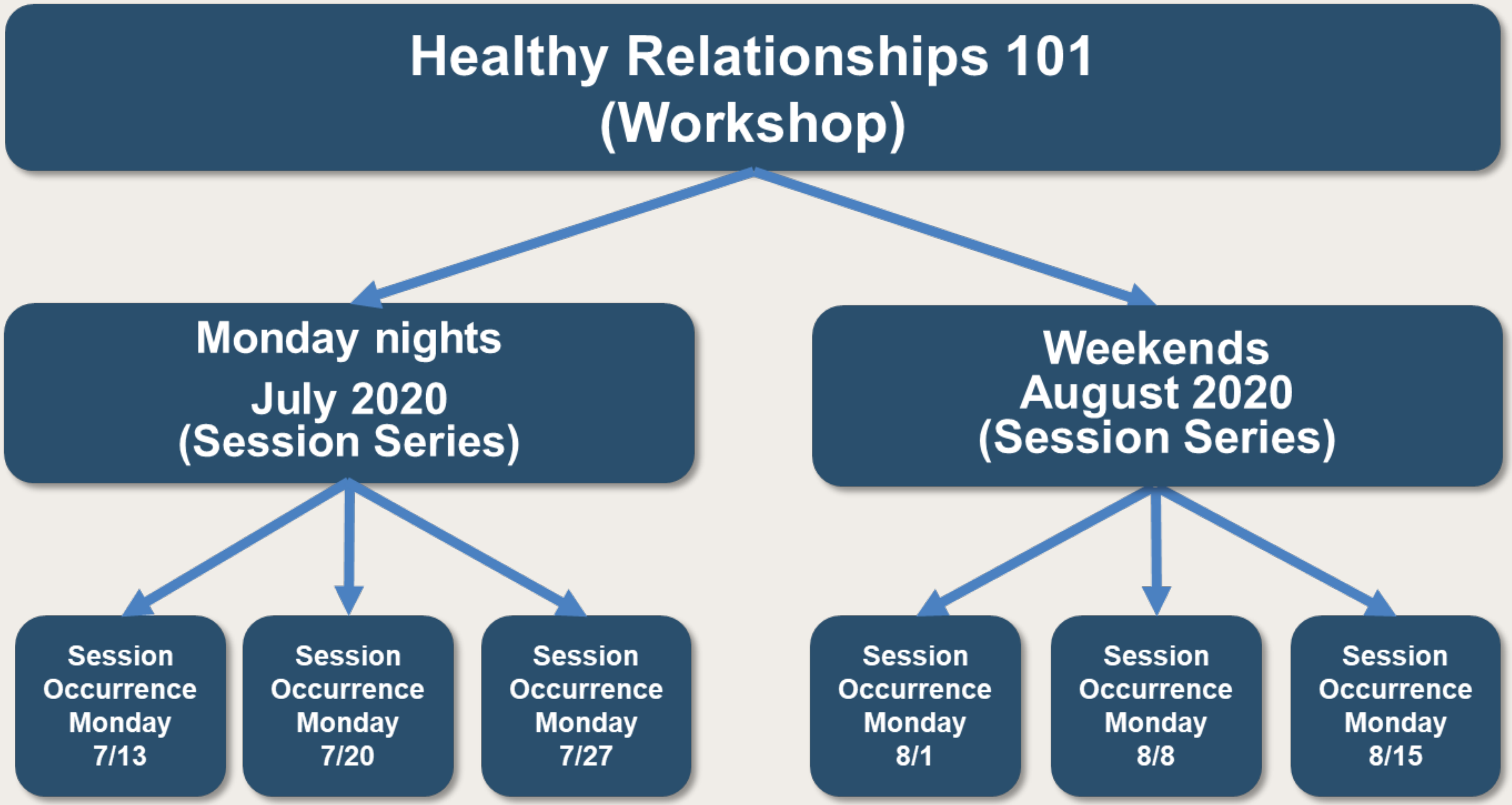


Add and manage:

- Workshops
- Session series
- Session occurrences

Record workshop participation

Track participation in group-based services



Two types of workshops

Primary workshops

- A curriculum-based workshop that all participants are expected to attend and, ultimately, complete

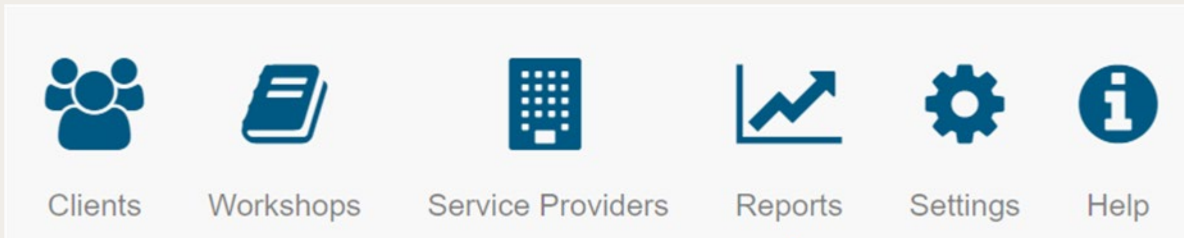
Optional workshops

- Group-based services that the program offers but that are not considered a “core” part of programming

Track participation in primary workshops and progress toward target hours

- Targets are the total hours of primary workshops that clients in each population are expected to attend
- In nFORM, see how clients are progressing towards the target hours and what average participation is

Data tools and reports



- Operational reports
- Quarterly reports to OFA
- Program Operations Survey
- Query tool
- Data export

Access aggregate- and record-level data

Query Tool

A data visualization tool

Drill down by options like date and client population

Operational Reports

Reports showing summary and client-level data

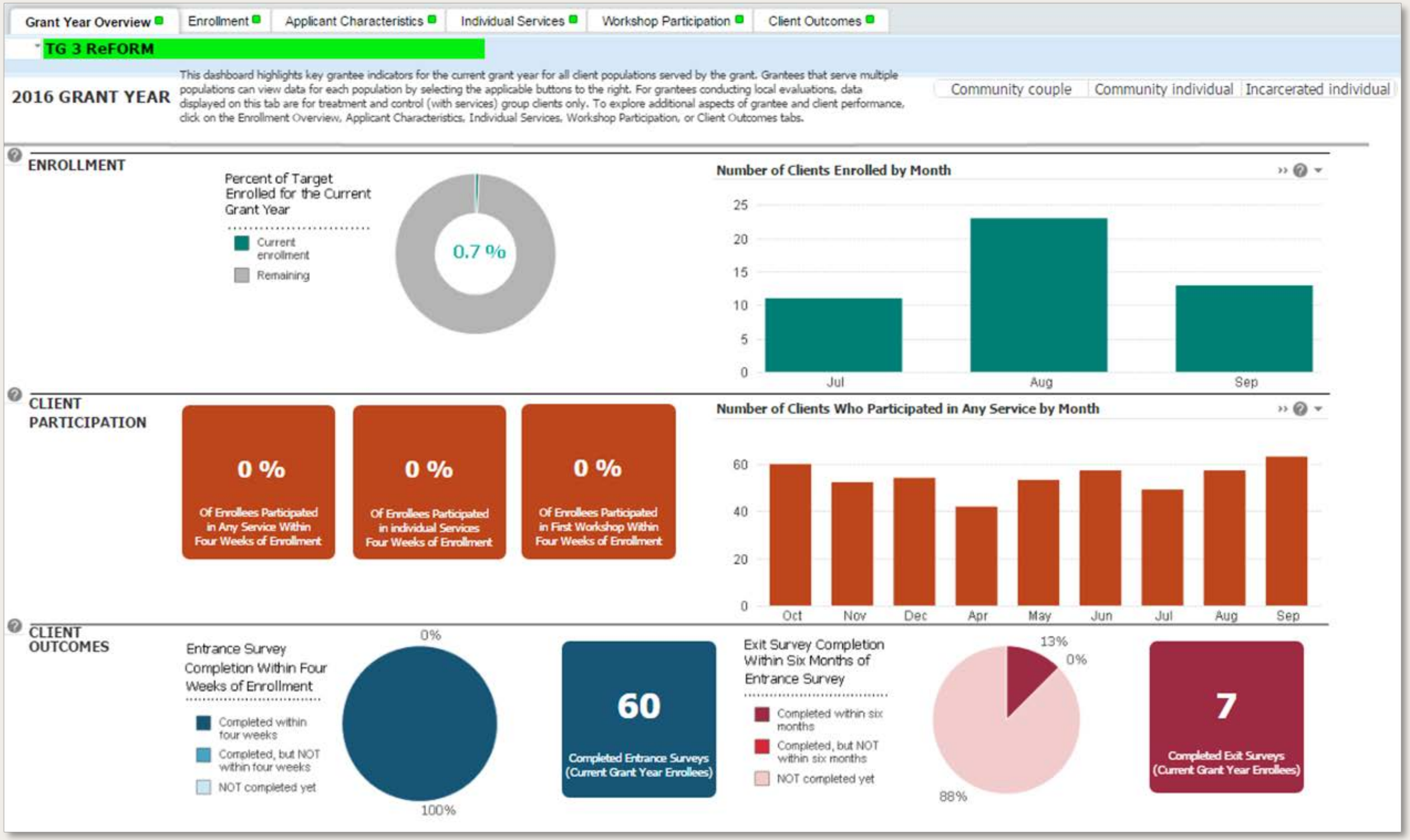
Open in Excel to sort and filter the information

Data Export

Export of all data except personally identifiable information

Open in Excel or statistical program to do custom analyses

The query tool visualizes aggregate data to show the big picture



Reports give real-time access to data and help with activities like monitoring workshop participation

Demo Grantee

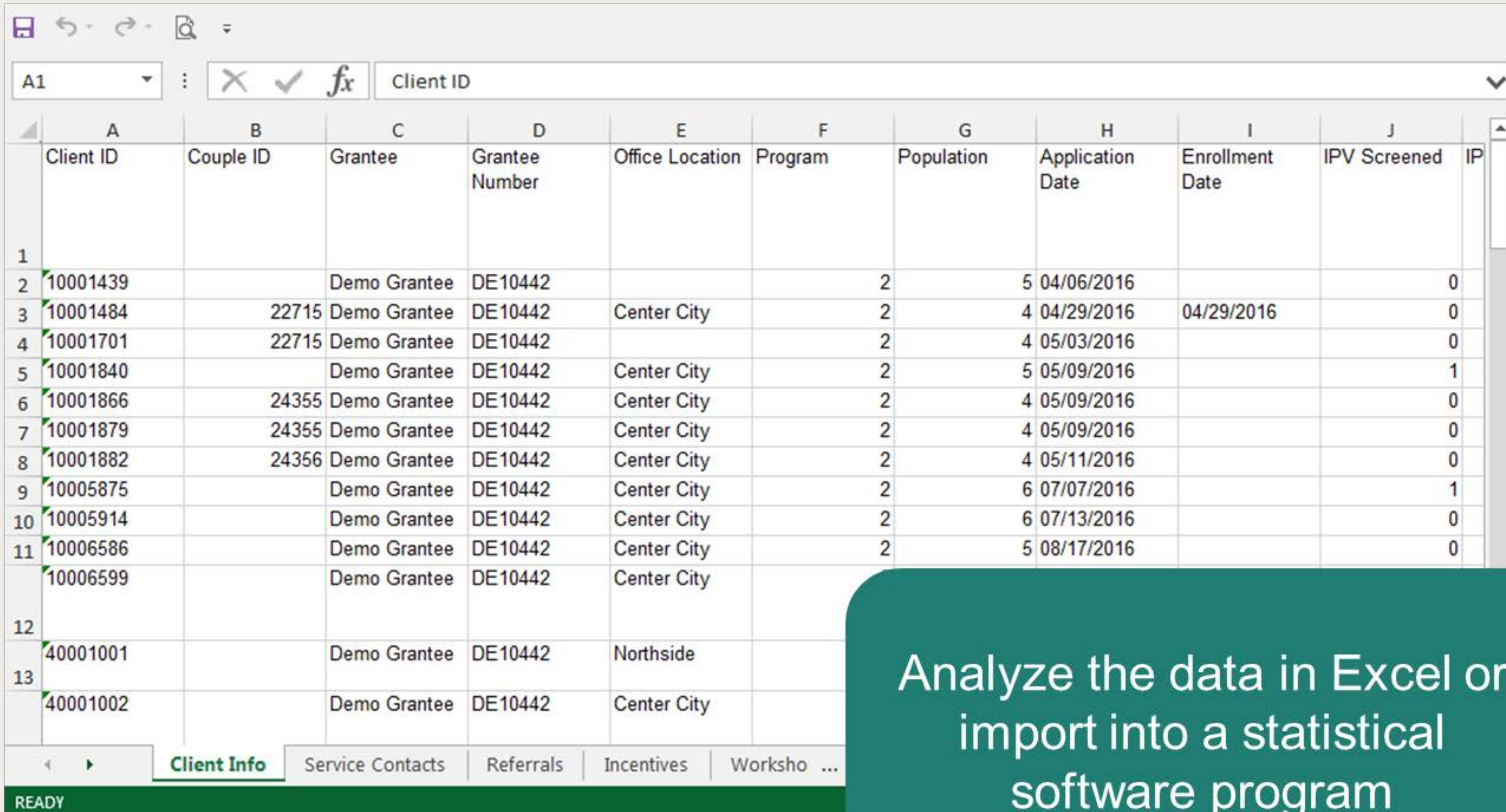
Participation in Primary Workshop(s) - Detail Report

Clients Enrolled 9/30/2018 - 7/30/2019

Location	Client Population	Client ID	Couple ID (if applicable)	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)
Main Street	Adult individual	10012868		Charlie	Brown	Completed/graduated	2/2/2019	2/3/2019	6/1/2019	6/1/2019	8	10	80%
Main Street	Adult individual	10012871		Boris	Badenov	Completed/graduated	2/2/2019	2/3/2019	6/1/2019	6/1/2019	10	10	100%
Main Street	Adult individual	10012874		Tweety	Bird	Completed/graduated	2/2/2019	2/3/2019	6/1/2019	6/1/2019	10	10	100%
Main Street	Adult individual	10012877		Bugs	Bunny	Completed/graduated	2/2/2019	2/3/2019	6/1/2019	6/1/2019	10	10	100%
Main Street	Adult individual	10012880		Alvin	Chipmunk	Completed/graduated	2/2/2019	2/3/2019	6/1/2019	6/1/2019	10	10	100%
Main Street	Adult individual	10012883		Sheldon	Cooper	Completed/graduated	2/2/2019	2/3/2019	6/1/2019	6/1/2019	10	10	100%
Main Street	Adult individual	10012886		Alice	Cramden	Completed/graduated	2/2/2019	2/3/2019	6/1/2019	6/1/2019	10	10	100%
Main Street	Adult individual	10012889		Jiminy	Cricket	Completed/graduated	2/2/2019	2/3/2019	6/1/2019	6/1/2019	10	10	100%
Central High	Youth	10012892		Jessica	Day	Completed/graduated	3/1/2019	3/1/2019	5/15/2019	5/15/2019	16	16	100%
Central High	Youth	10012895		Fred	Flintstone	Completed/graduated							
Central High	Youth	10012898		Speedy	Gonzalez	Completed/graduated							
Central High	Youth	10012901		Max	Green	Completed/graduated							
Central High	Youth	10012904		Carl	Winslow	Completed/graduated							
Central High	Youth	10012907		George	Jetson	Completed/graduated							
Central High	Youth	10012910		Harry	Potter	Completed/graduated							

Open in Excel to sort and filter the table or make graphs with the data

Do custom analyses with the data export

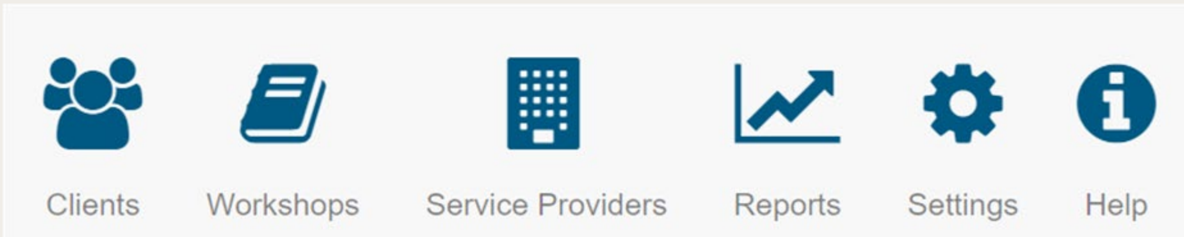


A1 | Client ID

	A	B	C	D	E	F	G	H	I	J	
1	Client ID	Couple ID	Grantee	Grantee Number	Office Location	Program	Population	Application Date	Enrollment Date	IPV Screened	IP
2	10001439		Demo Grantee	DE10442		2	5	04/06/2016		0	
3	10001484	22715	Demo Grantee	DE10442	Center City	2	4	04/29/2016	04/29/2016	0	
4	10001701	22715	Demo Grantee	DE10442		2	4	05/03/2016		0	
5	10001840		Demo Grantee	DE10442	Center City	2	5	05/09/2016		1	
6	10001866	24355	Demo Grantee	DE10442	Center City	2	4	05/09/2016		0	
7	10001879	24355	Demo Grantee	DE10442	Center City	2	4	05/09/2016		0	
8	10001882	24356	Demo Grantee	DE10442	Center City	2	4	05/11/2016		0	
9	10005875		Demo Grantee	DE10442	Center City	2	6	07/07/2016		1	
10	10005914		Demo Grantee	DE10442	Center City	2	6	07/13/2016		0	
11	10006586		Demo Grantee	DE10442	Center City	2	5	08/17/2016		0	
12	10006599		Demo Grantee	DE10442	Center City						
13	40001001		Demo Grantee	DE10442	Northside						
	40001002		Demo Grantee	DE10442	Center City						

Analyze the data in Excel or import into a statistical software program

Review guidance and seek technical assistance



- Detailed guidance (e.g., user manual)
- Quick reference guides
- Training videos
- Web help desk

Types of training and technical assistance

Individualized TA	Written and Digital Resources	Group-based TA
• Web help desk • Respond to questions by email or phone	• User manual • Training videos • Tip sheets	• Virtual office hours • Webinars • Conference and meeting presentations

Continuous Quality Improvement (CQI)

What is CQI?

- CQI involves identifying and analyzing strengths and problems, testing potential solutions, and revising solutions
- An implementation team oversees and manages CQI
  - All staff have a role in CQI

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CQI is more than just program monitoring

- CQI is a systematic, ongoing, and iterative process
  - Program monitoring documents what is happening
  - CQI is a way to use that information for improvement
- It is data-driven
  - There is no CQI without high quality data
  - nFORM is a key data source for CQI

What are the CQI requirements?

- Applicants must describe organizational commitment to data-driven approaches to identify areas to improve performance, test improvements, and cultivate an environment for learning and improvement
- Grantees must develop, implement, and regularly update a CQI plan
- Initial plans must be developed within three months of grant award, and ACF will review and approve plans

Grantee's CQI plans

- A program's mission, theory of change, and logic model guide CQI
- As appropriate, link CQI to certain evaluation activities
- Grantees are also expected to show evidence of ongoing execution of the plan, and updates and refinements to the plan

Data and support for CQI

nFORM data
Grantee-collected data

ACF-created CQI templates
Tip sheets
Technical assistance

ACF-created CQI templates

- ACF has developed a template that walks through the steps of a CQI plan
  - Grantees can fill in the template to develop their plans
  - Grantees are not required to enter information directly into the template, but all CQI plans should include the information described in the template
- There are also templates for working with an implementation team
- The templates include instructions, tips, and links to other resources

Reporting performance

How will HMRF grantees report performance?

- All performance measures data will be stored in nFORM
- All numeric information generated at the touch of a button in nFORM
- Grantees will report performance quarterly
  - PPR = semiannual performance progress report (months 6 and 12)
  - QPR = quarterly progress report (months 3 and 9)

Reporting schedule

Quarter	Report Type	Reporting Period
1	QPR	September 30 to December 31 (Quarter 1)
2	PPR	September 30 to March 31 (Quarter 1 + Quarter 2)
3	QPR	September 30 to June 30 (Quarter 1 + Quarter 2 + Quarter 3)
4	PPR	September 30 to September 29 (Quarter 1 + Quarter 2 + Quarter 3 + Quarter 4)

QPRs and PPRs report numeric and qualitative information

Numeric portion

- Enrollment
- Program participation
- Client characteristics and outcomes
- Program operations

Progress narrative

- Programs give context to the numeric portion with qualitative information in the form of a narrative

Academic year appendix

- Appendix will generate only for programs serving youth in schools
- Appendix shows numeric information in QPR and PPR calculated on the academic calendar instead of the fiscal year
- Tables in the appendix will show data only for youth clients
- Aligns numeric data with structure of programs in schools

Resources for applicants

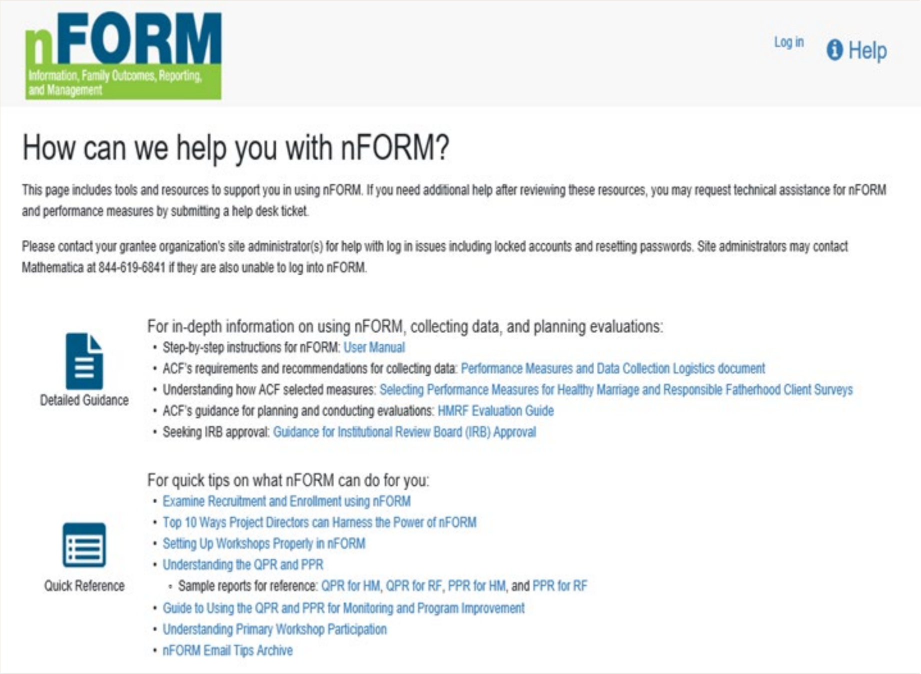
HMRF applicant website

- Designed for OFA's RF and HM grant applicants
- Links to the FOAs
- Tips and other things to consider
- Links to other resources
- Recordings of all applicant webinars

https://www.hmrfgrantresources.info/

nFORM and performance measures

- Resources for using nFORM
  - Training videos
  - User manual
  - Tip sheets
  - Data dictionary (for understanding all data elements in the 2015 cohort performance measures)
- Copies of performance measure surveys
  - Versions for the 2015 cohort
  - Versions for the 2020 cohort available on the applicant website



nFORM
Information, Family Outcomes, Reporting, and Management

Log in   Help

How can we help you with nFORM?

This page includes tools and resources to support you in using nFORM. If you need additional help after reviewing these resources, you may request technical assistance for nFORM and performance measures by submitting a help desk ticket.

Please contact your grantee organization's site administrator(s) for help with log in issues including locked accounts and resetting passwords. Site administrators may contact Mathematica at 844-619-6841 if they are also unable to log into nFORM.

Detailed Guidance

For in-depth information on using nFORM, collecting data, and planning evaluations:
- Step-by-step instructions for nFORM: User Manual
- ACF's requirements and recommendations for collecting data: Performance Measures and Data Collection Logistics document
- Understanding how ACF selected measures: Selecting Performance Measures for Healthy Marriage and Responsible Fatherhood Client Surveys
- ACF's guidance for planning and conducting evaluations: HMRF Evaluation Guide
- Seeking IRB approval: Guidance for Institutional Review Board (IRB) Approval

Quick Reference

For quick tips on what nFORM can do for you:
- Examine Recruitment and Enrollment using nFORM
- Top 10 Ways Project Directors can Harness the Power of nFORM
- Setting Up Workshops Properly in nFORM
- Understanding the QPR and PPR
  - Sample reports for reference: QPR for HM, QPR for RF, PPR for HM, and PPR for RF
- Guide to Using the QPR and PPR for Monitoring and Program Improvement
- Understanding Primary Workshop Participation
- nFORM Email Tips Archive

https://www.famlecross-site.com/nForm/Contact

Contact information

Contacts for Fatherhood FIRE FOA:

- OFA: Tanya Howell at Tanya.Howell@acf.hhs.gov
- Grants Management (OGM): Bridget Shea Westfall at Bridget.Sheawestfall@acf.hhs.gov

Contacts for Family, Relationship, and Marriage Education Works - Adults (FRAMEWorks):

- OFA: Jacqueline Proctor - Jacqueline.Proctor@acf.hhs.gov
- Grants Management (OGM): Bridget Shea Westfall at Bridget.Sheawestfall@acf.hhs.gov

Contacts for Relationships, Education, Advancement, and Development for Youth for Life (READY4Life):

- OFA: Meghan Heffron -meghan.heffron@acf.hhs.gov
- Grants Management (OGM): Bridget Shea Westfall at Bridget.Sheawestfall@acf.hhs.gov

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Thank you!