How you can participate

/ **Use the chat to ask questions**

/ **Ask questions or share verbally using the hand raise feature**

/ **REMINDER: Never text or email client personally identifiable information (PII), including during office hours or when contacting the TA teams**
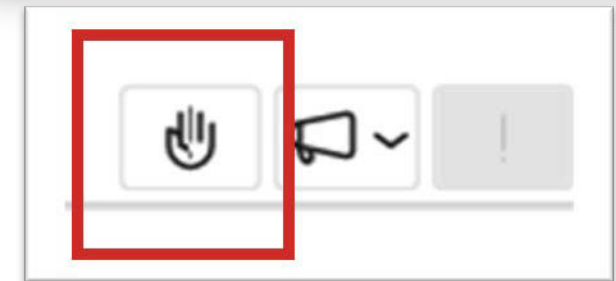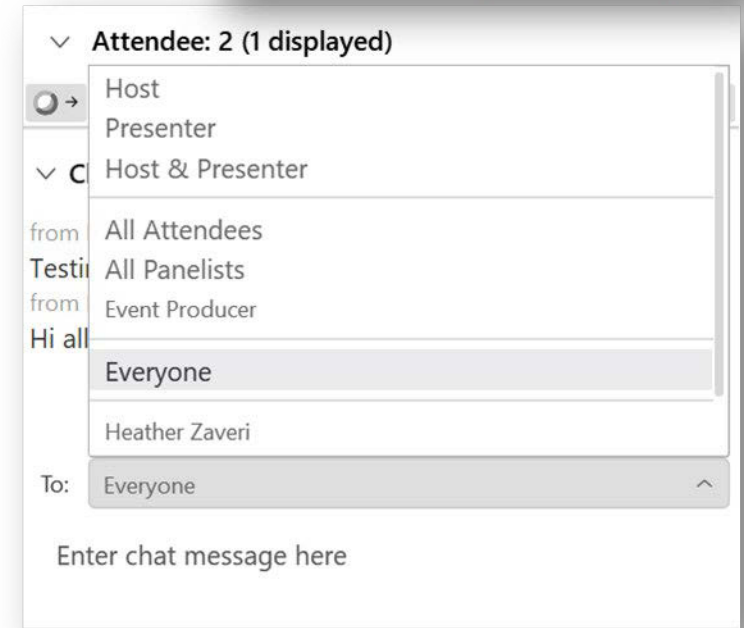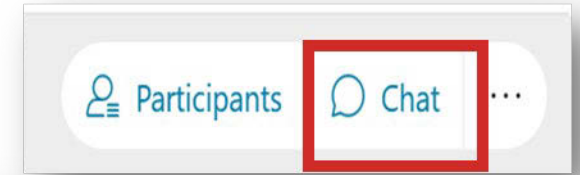
Today's agenda

/ **A data-driven approach for program monitoring and continuous quality improvement (CQI)**

/ **Examples of using nFORM data for program monitoring and CQI**

/ **Tip sheets on using nFORM data for program monitoring and CQI**

/ **Your questions**

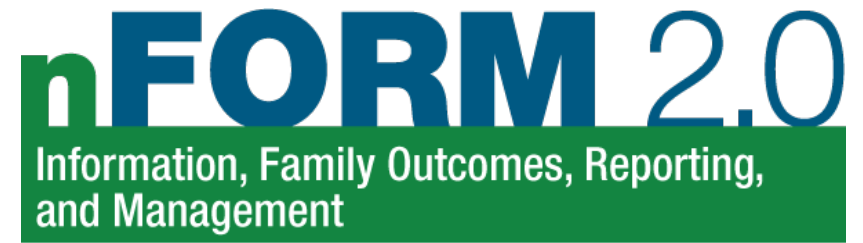# A data-driven approach for program monitoring and CQI

HMRF performance measures

/ **Grantees use nFORM to enter HMRF performance measures data**

- Client characteristics and outcomes
  - Applicant Characteristics Survey (ACS)
  - Entrance Survey
  - Exit Survey
- Enrollment and participation (service delivery)
- Program operations

nFORM data tools and reports
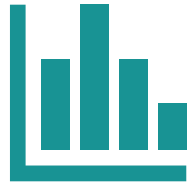
Query Tool

- A data visualization tool
- Drill down by options such as 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 all data except personally identifiable information
- Open in Excel or statistical program to do custom analyses

Quarterly reports

/ **Grantees generate all numeric information for reports at the touch of a button in nFORM**

- Quarterly Progress Report (QPR) in months 3 and 9
- Semiannual Performance Progress Report (PPR) in months 6 and 12

/ **Grantees can generate the reports at anytime to use for program monitoring and CQI**

Poll question

/ **How often does your team review data from nFORM's data tools and reports?**

- More than once/week

- Weekly

- About every other week

- Monthly

- Quarterly

Being data-driven

/ **Use nFORM's data tools and reports to monitor program operations and improve programming**

/ **Consider what you want to know**

- Manage day-to-day program operations and workflow

- Empirically identify operational strengths and challenges

- Track whether program modifications are associated with improvements

- Measure change over time

Program monitoring and CQI

/ **CQI is a process for identifying and addressing operational challenges**

Program monitoring: *Identify the challenge*

Target: Clients attend 90% of primary workshop hours

60%   54%

1   2
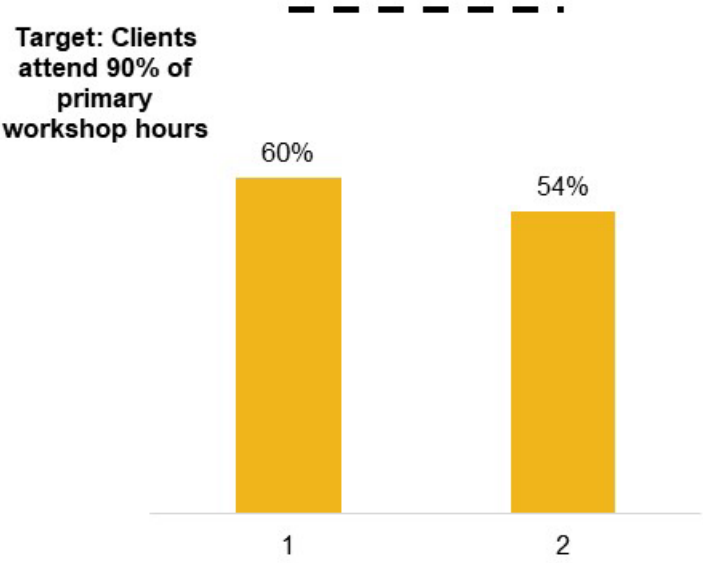
CQI: *Develop and test the solution*

- Specify the challenge: who is experiencing it?
- Set an improvement goal
- Develop a strategy and monitor implementation
- Monitor progress on goal

nFORM data support CQI
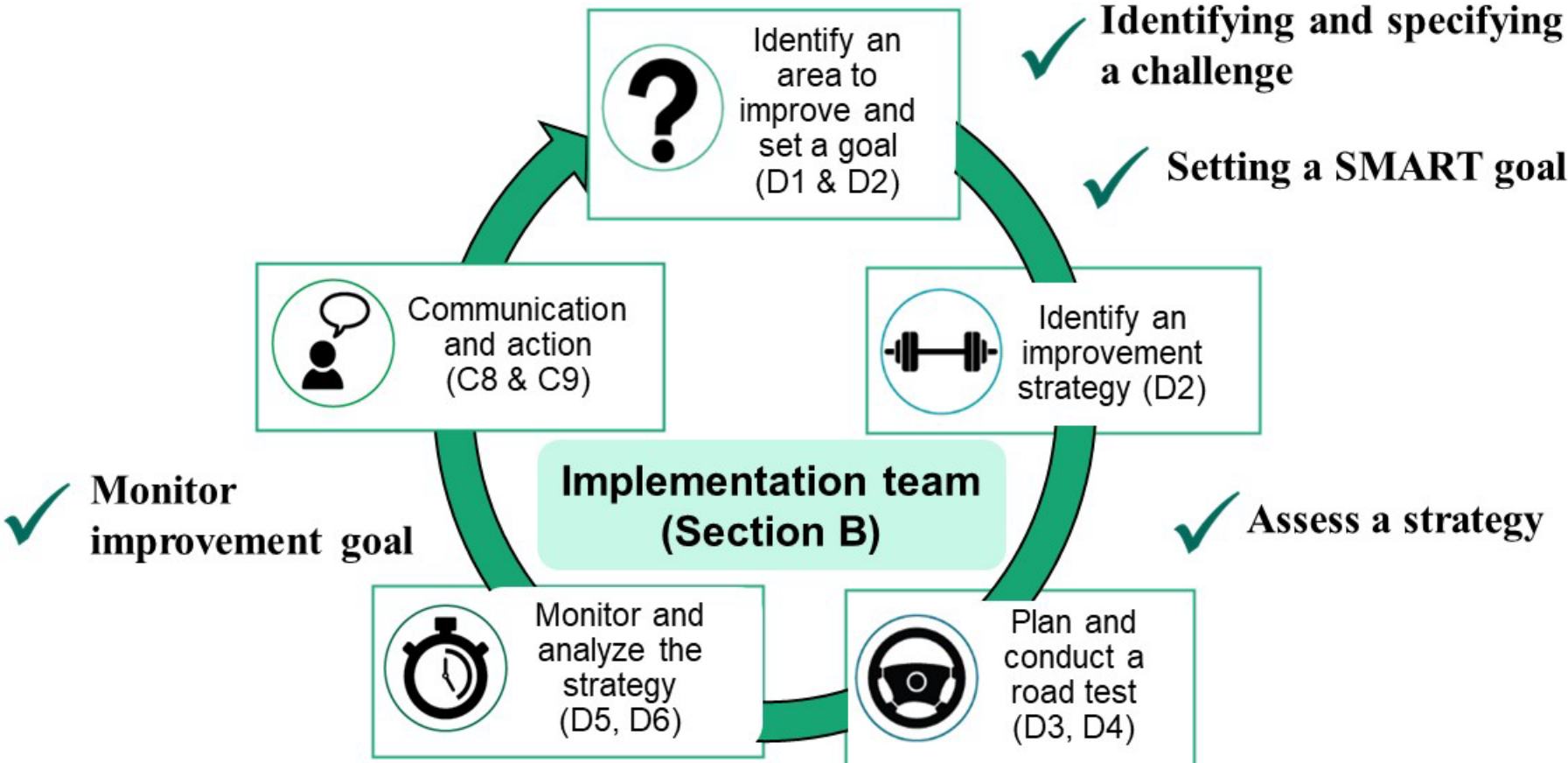
The corresponding sections of the CQI plan template are referenced in parentheses.

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Identify and specify challenges

/ Drilling down with nFORM tools

- Allows examination by subgroups, such as client population, time periods, locations, or workshops

- Look for trends, review with team, and examine hunches

/ Goal is to turn a high-level question into a specific one

- Initially: Why is attendance dropping?

- After drilling down: Why does attendance drop off after session 3 of our primary workshop?

Setting a SMART goal

/ **SMART goals answer the question: What are we trying to accomplish?**

/ **They are Specific, Measurable, Achievable, Relevant and Time-bound**

/ **Use nFORM data to help your team specify:**

- What's the baseline? Where is the team currently, compared to the goal?

- What's an achievable goal to reach?

Developing and testing strategies

/ **Use nFORM data to help**

- Deepen your understanding of issues

- Develop strategies to road test

- Understand strategy implementation

- **Strategy: To build connection, facilitators will have contact with clients via text or phone at least once between each session**

- **Did it happen? Examine the number of text and phone call service contacts by client and staff**

Monitoring improvement goals

/ **After a strategy shows promise in road testing, you may decide to sustain or scale up**

/ **Long-term monitoring of SMART goal helps to assess improvement**

/ **Use data tools to keep tabs on the outcome related to your improvement goal**

- Are we on target with increasing participation?

- Are more clients returning after session 3?

- Who is our strategy working for? Which clients are more likely to complete the workshop?

Poll question

/ **How have you used nFORM data to support CQI efforts?**

- Learning about a challenge

- Developing improvement goals

- Road testing improvement strategies

- Monitoring long-term progress toward SMART goals

- Other (let us know in the chat!)

Examples of using nFORM data for program monitoring and CQI

Examples of improving with data

/ **This presentation focuses on a few questions that might be of interest to grantees and can support program improvement**

- You will likely have many other ideas!

/ **All the examples in the presentation use data that you already collect for performance measures and can easily export or query with nFORM**

Enrollment

/ **Are you enrolling as many people as planned?**

Low enrollment in PPR (C-03)

| 1. Enrollment targets and actual enrollment	Number of Community Individuals
Enrollment target for the grant year	100
Enrolled since the beginning of grant year through the end of reporting period	65
% of grant year target met to date	65.0%

Challenge: enrollment

/ **Challenge: Reaching our enrollment target for community fathers**

/ **Learn about the challenge with the query tool:**

- What are the monthly enrollment trends of this group?
- How did these individuals hear about the program?

Number of Clients Enrolled by Grantee Location, by Month
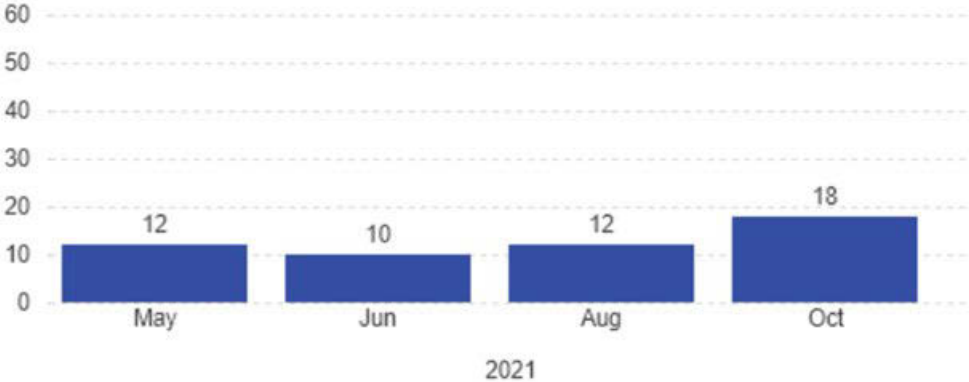
How Applicants Heard About the Program
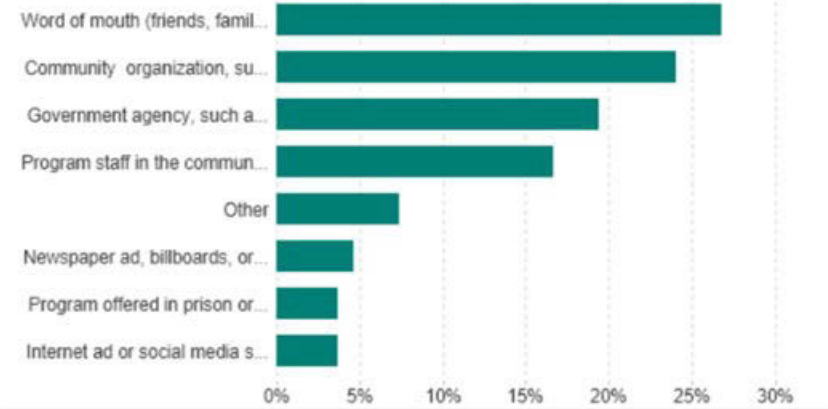
Challenge: enrollment

/ **We determine that the number of community fathers who learn about the program through a referral organization or agency is lower than expectations**

/ **We will road test a strategy to strengthen referral partnerships**

/ **We will refine the strategy based on road test results, and monitor improvement using the query tool and quarterly reports**

Applicant characteristics

/ **Are you enrolling the folks you intend to help?**

Not reaching target population

/ **Our program aims to serve clients between the ages of 21 and 44**

/ **The query tool's Applicant Characteristics tab shows we are not fully reaching our target age group; only 41% of enrollees are in the target age range**

Legend:
- 21 – 24 years
- 25 – 34 years
- 35 – 44 years
- 45 – 54 years
- 55 years or older

Pie chart values: 1%, 16%, 24%, 19%, 39%
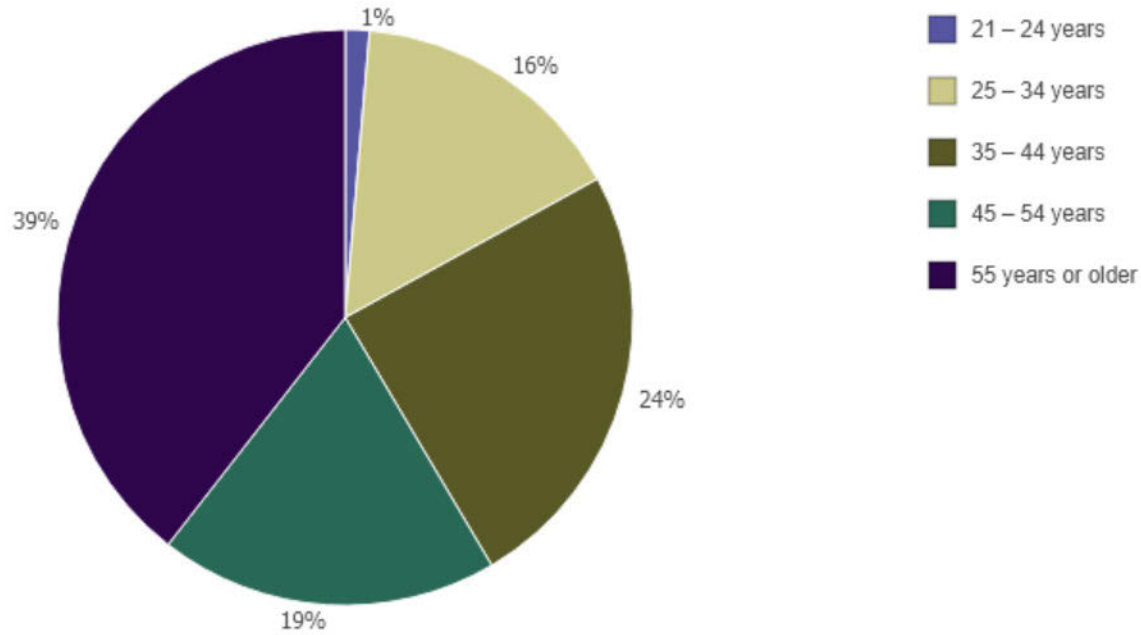
Challenge: target population

/ **Learn about the challenge:**

- How do clients hear about the program?

- What is their reason for enrolling?

/ **Use insights to road test a new marketing strategy aimed toward clients aged 21-44**

/ **Monitor enrollment trends over time:**

- Are we increasing the proportion of clients in the 21-44 age group?

- Use the query tool to monitor the age distribution of your clients

Participation

/ **Did clients stay engaged in the program long enough to potentially benefit from it?**

Low participation in PPR (C-04.2b)

Table 2: Achievement of participation benchmarks during reporting period

Adult individuals	Count of clients achieving benchmark			Target count of clients for benchmark (TGT)	Percent of target met (PCT=TC/ TGT)
Benchmarks for participation in primary workshops (BP)	Clients enrolled in grant year 1 (GY1)	Clients enrolled in grant year 2 (GY2)	Total clients (TC=sum of all GYs)		
Initial attendees: Attended at least one primary workshop session	0	18	18	250	7.2%
Halfway attendees: Attended at least 50% of primary workshops hours	0	14	14	200	7%
Completed clients: Attended at least 90% of primary workshop hours	3	2	5	175	2.9%
Fully finished clients: Attended at least 100% of primary workshop hours	2	0	2	150	1.3%

NOTE: Table 2 includes clients/couples enrolled from start of grant year 1 through reporting period end date who have achieved at least one benchmark during the selected reporting period; only clients in populations with participation benchmark targets in the selected reporting period are included. Enrollment numbers for the current grant year may be found in [QPR or PPR] Section [B-01 or C-03]. For other grant years, refer to past QPRs/PPRs or the enrollment tab of the query tool.

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Challenge: participation

/ **Start by narrowing in on one challenge**

- Will you focus on the challenge of enrolling clients?

- Or on retaining clients who show up for one or more sessions?

/ **Staff prioritize retaining attendees who show up for the first session**

- How many clients drop out between the first session and the halfway point?
    - When are they dropping out?
    - Who is dropping out?
- How many make it halfway, but don't complete?

Use nFORM participation data

/ **After which session(s) do the clients stop engaging?**

- Answer this question with the Series Session Attendance operational report or the data export's Session Attendance tab

/ **What are the characteristics of those who stop attending?**

- Answer this question by linking the data from the data export's Session Attendance and Survey Response Data tabs using the client ID number

/ **Is this a problem across locations?**

- Answer this question with the Series Session Attendance operational report or the data export's Session Attendance tab

What program monitoring and CQI questions are you asking that nFORM can answer?

Grantee questions

Are we serving our target population?

What types of outreach and engagement have the best referrals to the program?

What sessions are clients most likely to miss? Are there any sessions that seem to be less well attended?

At what point do clients decide not to come back to the workshop?

What are the characteristics of clients who stick with the program through to completion?

Do clients report satisfaction with the program?

Do client outcomes appear to be moving in the right direction?

Does the length (e.g., 5 weeks vs. 12 weeks) of the healthy relationships workshop impact learning outcomes?

Breakout rooms

/ **Share your experiences using nFORM to identify and learn about challenges related to enrollment, attendance/retention, and other program issues.**
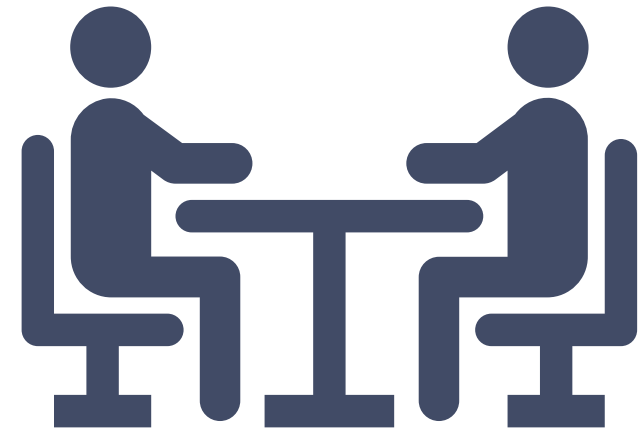
Enrollment questions

/ **Have you explored or are you planning to explore a similar question?**

- Reach with target population
- Success of outreach methods
- Other enrollment questions

/ **How did you explore the question? What data did you use?**

/ **What did you learn? How did you use that information?**

Are we serving our target population?

What types of outreach and engagement generate the most referrals?

Retention questions

/ **Have you explored or are you planning to explore a similar question?**

- Attendance trends across sessions
- Demographic characteristics and attendance/retention
- Dropout trends
- Other retention questions

/ **How did you explore the question? What data did you use?**

/ **What did you learn? How did you use that information?**

What sessions are clients most likely to miss? Are there any sessions that seem to be less well attended?

What are the characteristics of clients who stick with the program through to completion?

At what point do clients decide not to come back to the workshop?

Other programmatic issues

/ **What other programmatic issues have you explored or are you planning to explore?**

/ **How did you explore them? What data did you use?**

/ **What did you learn? How did you use that information?**

Relevant tip sheets on HMRF Resources

On the nFORM page

- Examining Enrollment and Participation with nFORM
- Top 10 Ways Project Directors Can Harness the Power of nFORM
- Using nFORM to investigate programmatic challenges
- December 14, 2021 webinar slides

On the CQI page

- Ideas for Using nFORM Data for CQI
- Strategy Development brief

We are here to help!

CQI help desk

- hmrfcqi@mathematica-mpr.com

nFORM help desk

- Submit a ticket in nFORM
- nform2helpdesk@mathematica-mpr.com

Questions?