Healthy Marriage and Responsible Fatherhood Grantee Data Collection Plan Template

nFORM 2.0

Information, Family Outcomes, Reporting, and Management

Grantee name	Click or tap here to enter text.
Data manager	Click or tap here to enter text.
Data collection lead	Click or tap here to enter text.
Continuous quality improvement (CQI) implementation team lead	Click or tap here to enter text.
Date of data collection plan or plan update	Click or tap to enter a date.

Instructions

A. This template guides Healthy Marriage and Responsible Fatherhood (HMRF) grantees through the key stages of data collection using nFORM 2.0 to help plan ahead and train staff so that data collection runs as smoothly as possible. A thorough plan will help you and your team achieve high quality data collection that is **consistent, complete, timely, and secure**. The template begins with a data

A. Data collection overview

Before you develop a plan for each stage of data collection, use this table to document key considerations that will inform your plan.

Data collection overview	
What client population(s) is/are covered in this plan? *(Check all that apply)*	FRAMEWorks: ☐ Adult individuals ☐ Adult couples READY4Life: ☐ Youth in schools ☐ Youth in the community ☐ At-risk youth (including homeless youth and those in or aging out of foster care) Fatherhood FIRE: ☐ Reentering fathers ☐ Fathers in the community ☐ Couples
In which settings will you enroll clients and administer surveys? *(Check all that apply)*	☐ Virtual ☐ In grantee offices ☐ In schools ☐ In correctional facilities ☐ Other *(please specify)* Click or tap here to enter text.
If you are conducting data collection in person, list each physical location and its street address, the point of contact at each location, and their contact information (phone number and email). Include all locations and contacts and clearly distinguish them from each other.	Click or tap here to enter text.

Data collection overview	

ACF requires that grantees administer web surveys to clients unless there are special circumstances and your FPS provides permission to use paper surveys.
 	
Will you administer web-based surveys to clients in each location?
	☐ Yes
	☐ No *(indicate why web-based surveys can't be administered)*
	    ☐ No Internet access
	    ☐ Restrictions on clients using laptops or tablets
	    ☐ Other *(please specify)*Click or tap here to enter text.

Will you administer surveys to individual clients, one-on-one, or to multiple clients at the same time in a group setting? *(Check all that apply)* Make sure that you have enough devices so that there is one per client or adjust your data collection plan. Plan for having backup equipment to minimize downtime in the event that a replacement computer or device is needed.	☐ Individual survey administration ☐ Group survey administration *If in a group,* how many clients will typically complete surveys at the same time? Click or tap here to enter text. Do you have enough tablets or laptops for each client to complete the survey? ☐ Yes ☐ No
Considering your clients' primary languages, in what languages will you need to administer client surveys? Estimate the percentage of surveys in each language. All surveys are available in English and Spanish. For other languages, you should translate surveys in advance, read the survey questions and their answer options to clients in their primary language, and record their responses in nFORM.	English Click or tap here to enter text.% Spanish Click or tap here to enter text.% Other *(please specify)* Click or tap here to enter text. Click or tap here to enter text.%

Data collection overview	
Will any clients need help reading and understanding the survey questions? Please enter the percentage of clients whom you expect to use nFORM's Audio Computer-Assisted Self-Interview (ACASI) feature, which allows clients to listen to a recording of the survey questions and answer options.	☐ Yes Click or tap here to enter text.% ☐ No
Will any clients need other assistive devices, such as screen readers? Document the percentage of clients that may need other devices/support and what will be provided.	☐ Yes Click or tap here to enter text.% ☐ No
Will any clients need training on how to use the tablets or laptops that you will use for data collection? Estimate the percentage of clients you expect you will need to train and plan time for demonstrating how to use devices before clients start surveys.	☐ Yes Click or tap here to enter text.% ☐ No
Are you conducting a local evaluation of your HMRF grant? If so, estimate the percentage of clients you expect to participate in the evaluation. You may need to develop a separate data collection plan that applies to clients participating in the evaluation. Coordinate with your local evaluator to discuss data collection plans for nFORM and other data sources.	☐ Yes Click or tap here to enter text.% ☐ No

Data collection overview	
Does your organization, institutional review board (IRB), or local or federal evaluation partner require you to develop a consent procedure and obtain IRB approval before enrolling clients in your program? ACF does not require this for purposes of performance measurement data collection and reporting, but grantees must check with their own organizations and partners.	☐ Yes ☐ No
Are you preparing a CQI plan to develop and test a program improvement strategy? Coordinate with your CQI implementation team leader to assist in identifying data sources and completing the CQI Plan template. Update overall grant data collection plans as needed to incorporate CQI-related data collection.	☐ Yes ☐ No

B. Getting organized

Before collecting data from clients, document how you will set up nFORM user accounts for your staff. You will also need a plan for obtaining and setting up the equipment you need to conduct data collection. The nFORM User Manual and the Data Collection Logistics Manual can help you plan your data collection.

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?	We have a plan!
Review the nFORM user account types in the nFORM User Manual and determine which type of user account each of your staff needs. Set up grantee staff accounts in nFORM.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Review the information on best practices for protecting client privacy in the Data Collection Logistics Manual, and incorporate them into your plans for each stage of data collection. Also review any information on protecting client privacy provided by your organization, partners, IRB, and local evaluators, as applicable.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?	We have a plan!
To maintain data security, grantee staff and clients must use separate devices. Clients should only access the surveys, not other parts of nFORM. Document how many tablets or laptops you will need for each client who needs to complete a survey. Consider your answer above about whether clients will complete surveys one-on-one or in a group setting. Document how many computers you will need for grantee staff to enroll clients, record services, and generate passcodes for client surveys. Plan for having backup equipment to minimize downtime in the event that a replacement computer or device is needed.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Bookmark the survey URL on each tablet or laptop that clients will use to take surveys. Include the URL as a shortcut/icon so that it is easier to find.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Before you administer surveys, check the Internet connection in each location where clients will be completing surveys. Determine whether you are allowed to use the site's Internet connection (this might not be allowed in schools or correctional facilities). Check whether the Internet speed is sufficient to support your data collection—Google provides a simple speed test. And, assess whether there are security protections in place to prevent unauthorized access to nFORM.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?	We have a plan!
Obtain Jetpacks or mobile hotspots if Internet is not available or the connection is not strong enough and test the strength of the signal in the places where you will use Jetpacks or mobile hotspots. Determine how many Jetpacks you will need, and make sure they are optimized for the number of laptops and tablets that will be accessing nFORM and the surveys.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Provide clean earbuds for clients so they can listen to survey questions. Determine how many earbuds you will need for each survey administration.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Obtain wipes that are approved for cleaning all devices and earbuds after each client use. Determine the amount needed for each survey administration.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
If web administration is not possible, speak to your FPS to obtain approval to use paper copies of surveys.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
If your FPS provides approval to administer paper surveys, document your plans for printing and administering the paper surveys and data entering the responses into nFORM. Consider how often you will need to administer paper surveys and in what languages and how you will securely transport, administer, store, and ultimately destroy the paper surveys to protect client confidentiality.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐

C. Enrolling clients

The first step in serving your clients is enrolling them in your HMRF program. Module 5 of the nFORM User Manual provides detailed information about how to enroll clients using nFORM, including specific steps for clients participating in local evaluations.

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?	We have a plan!
Confirm the applicant's eligibility for your program and, if you serve multiple HMRF populations in your program, note their applicable population.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Complete the application form in nFORM to create the client record in nFORM. Consider the settings in which you will conduct enrollment and how many clients will be enrolled at a time. Note that a client is fully enrolled after they have completed their Applicant Characteristics Survey and, for clients who are part of local evaluations, the client's service assignment is saved in nFORM.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Assign a case manager to the client.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐

D. Administering surveys to clients

Grantee staff administer three surveys to each client:

- **Applicant characteristics survey (ACS).** Clients should take the ACS before the first workshop session. Once a client completes the ACS, their enrollment is complete (unless the client will be randomly assigned for an evaluation), with the enrollment date set at the date of ACS completion. You cannot record information on service delivery and workshop attendance before the enrollment date.

- **Entrance survey.** You should administer the entrance survey to clients at the beginning of the first workshop session, after their enrollment is complete. The entrance survey will be customized for clients depending on the population selected for the client on the application form, so confirm that all information on the application form is correct before administering the entrance survey.

- **Exit survey.** nFORM automatically launches an exit survey that corresponds to the entrance survey your client completed at the beginning of the program. For example, clients who completed the youth entrance survey will complete the youth exit survey. Exit surveys must be completed **at least** 28 days after the entrance survey. nFORM will not allow the exit survey to be completed earlier than that. Be sure you have a plan for following up with clients who have left the program before they completed the exit survey so they can complete it.

Each survey follows similar processes, so this section of the template includes a table with tasks needed to complete administration of all three surveys. Adapt the table as needed for each type of survey.

Ideally, you will administer the surveys in a location where clients can spread out and have enough privacy. Plan the logistics for each survey administration well in advance so clients can start on time because delays might discourage them from participating in the survey.

Be sure to develop detailed scripts that staff can use to introduce the surveys to clients and provide information consistently. Staff should thank clients for participating, motivate them to complete the survey, provide a clear timeline, and encourage them to ask questions as needed before, during, and after the survey. Staff should reference the Privacy Act Statement and explain how to use the tablets or laptops and earbuds and how to navigate nFORM's ACASI and English/Spanish options. All these instructions should be in the scripts.

If surveys will be administered in group settings, plan activities to occupy clients who finish early.

Modules V and VII of the nFORM Manual include detailed information about how to use nFORM to administer client surveys. The Data Collection Logistics Manual has detailed guidance on how to maintain client confidentiality and data security.

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?	We have a plan!
Plan survey administration logistics well in advance, including where you will administer each survey, how many clients will be taking each survey at the same time, how many laptops or tablets are needed, and how you will maintain data security and client confidentiality throughout the process.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Prepare the tablets or laptops that clients will use to complete the survey. Turn them on, open the bookmarked survey URL on each device, plug earbuds into each device, and clean all equipment with disinfecting wipes.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Generate a survey passcode for each client and record it along with the client ID number on separate index cards or notepaper to hand to each client. If you are administering surveys to multiple clients in group settings, consider if you will use nFORM's bulk survey passcode process to generate passcodes for multiple clients at once (see the nFORM User Manual for more details of the bulk survey passcode process).	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Develop detailed scripts for staff to use to introduce the survey and provide a clear timeline to clients to ensure that all staff provide consistent messages. Ensure staff use the scripts when administering surveys.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Hand out tablets or laptops and earbuds to clients. Give each client their client ID and survey passcode.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?	We have a plan!
Ask clients to (1) navigate to the survey using the bookmarked URL (or open it for them), (2) log in using their client ID and passcode, (3) confirm their names, (4) answer the survey questions, and (5) ask clients to submit the survey when they are finished.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Ask clients to return their device to program staff or raise their hand to signal when they are done. Look at the device screen to confirm that the survey has been submitted. If not, ask the client to finish and submit the survey.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Plan how you will follow-up with clients who have not completed their surveys. Consider how you will reach out to clients to ask them to complete the survey. Plan to contact clients in multiple ways, such as by phone call, text, email, or in person.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
For exit surveys specifically, attempt to complete surveys even with clients who have left the program (for example, have dropped out or have not responded to outreach). Plan to contact clients in multiple ways, such as by phone call, text, email, or in person.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐

E. Recording participation in workshops and services

Throughout a client's participation in your program, you will be providing them with a range of services. All those services should be recorded in nFORM as they occur. Module VII of the nFORM User Manual provides detailed information about how to use nFORM to record clients' participation in workshops and services.

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?	We have a plan!
For workshops where clients should attend a series in advance, use nFORM's registration feature to register clients for the series. Ideally this is done before the first class.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Ensure clients receive information on the dates, times, and locations of all workshop sessions (or virtual connection information, if applicable). *This step applies to both registration-based and drop-in workshops.*	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Send clients reminder contacts and encourage them to attend workshop sessions.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Generate the attendance roster from nFORM before each class, and use it to record workshop session attendance during each class.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Enter the workshop session attendance in nFORM immediately after each class, then securely shred the paper roster.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Record individual service contacts in nFORM at the time of each contact.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?	We have a plan!
Record referrals in nFORM at the time of each referral.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Check in with clients to remind and encourage them to contact the service providers they have been referred to. Record whether clients follow up with referrals in nFORM.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Record incentives and program supports in nFORM whenever incentives and program supports are offered to clients.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐

F. Monitoring data collection and reporting performance

nFORM's client profiles, reports, and data tools help you monitor data collection to ensure that enrollment, survey completion, and services are progressing and are documented correctly. Specific nFORM reports and data tools are bolded in the table below. Module VIII of the nFORM User Manual has more information about the content and use of each report and tool. When you develop your monitoring approach, consider the pace of client enrollment and the level of services you are providing to plan how often you will use each report and tool. In your plan, keep client confidentiality in mind. nFORM client profiles and operational reports contain some personally identifiable information and must be safeguarded to protect client confidentiality. The Data Collection Logistics Manual has detailed guidance on how to maintain client confidentiality and data security.

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?	We have a plan!
Review individual client profiles to confirm client status, survey completion, referrals, and service participation.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Review the **Client Status Report Summary** to confirm who has completed enrollment, and other client statuses.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Review the **Primary Workshop Participation Detail Report** and **Primary Workshop Participation Summary** Reports to view the number of primary workshop hours clients have attended and assess clients' progress toward primary workshop targets.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Review the **Survey Completion Summary Report** to confirm how many clients completed each survey and to identify clients who are missing surveys.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Review the **Series Session Attendance Report** to monitor attendance at workshop sessions.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?	We have a plan!
Review **Caseload Summary** to monitor client assignments to case managers.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Review the **User Account Activity** report to monitor staff access to nFORM.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Review the **Query Tool** to track, monitor, and analyze client progress. Up to three nFORM users at each grant can access the query tool.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Generate and securely store a **Data Export** of all data recorded in nFORM, excluding personally identifiable information. Only site administrators can generate data exports.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Complete the quarterly **Program Operations Survey** and progress narrative.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Produce the **quarterly progress reports (QPRs) and semi-annual performance progress reports (PPRs)** for submission to ACF in advance of the due date to allow time for review. The QPRs are due each January and July and the PPRs are due each April and October.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Submit the **QPRs** and **PPRs** to ACF.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐

G. Training staff on data collection procedures

Now that you've planned how to complete each stage of data collection, it is time to train your team so they are prepared to carry out the plan. When developing your training, make sure you cover each stage of the data collection process. Consider which modes of training will work best (such as virtual, in person, or videos) and develop training materials that are appropriate for the experience level and size of your data collection team. Incorporate practice sessions and resources into your data collection training plans.

What needs to be done?	When will we do it?	Who is responsible?	How will we get it done?	We have a plan!
Develop training materials.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Schedule and conduct trainings.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Practice data collection activities with staff. Conduct trial runs of data collection procedures with staff to ensure processes will work smoothly and staff are familiar with them in advance of client data collection.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Conduct refresher trainings for staff periodically, and whenever updates are made to data collection plans.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐
Conduct initial trainings for new hires as part of their onboarding.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	☐