COLLECT MEANINGFUL DATA: Form Design Tips and Tricks

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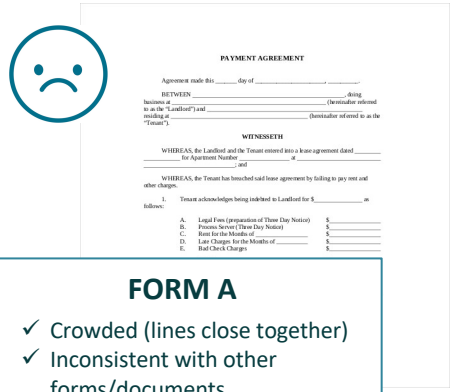
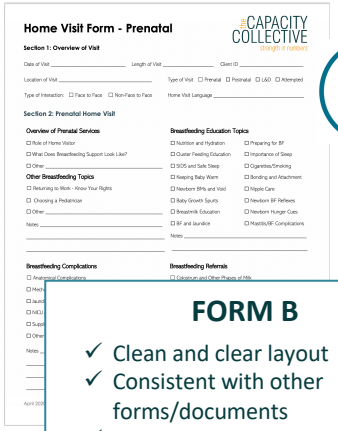
Purpose: Forms are one of the most important data tools, because they shape the way the data is collected and prepared to for entry into the database. Forms are also an important tool for building trust with staff and the clients, as they are one of the first official documents clients will see from your organization/program. Forms can signal a lot about a program—including how organized and professional you are. Here are some of our favorite tips and tricks for using forms to collect high quality data and show trust and professionalism to staff and clients.

Forms Set a Tone for your Program



vs



FORM A

- ✓ Crowded (lines close together)
- ✓ Inconsistent with other forms/documents
- ✓ Confusing language
- ✓ Not clear where form comes from or why needed

FORM B

- ✓ Clean and clear layout
- ✓ Consistent with other forms/documents
- ✓ Clear language and instructions
- ✓ Clear the form is associated with program and organization

THE MESSAGE	THE MESSAGE
This could have come from anywhere	They know what they are doing
They are new to this	They have done this before
I don't know what is expected of me	This program seems organized
This seems like a lot to ask	I can trust them with my info
This is going to be stressful	They are professionals
I don't know if I can trust this place	I can feel confident
I am not sure about this	This will be smooth and painless

Good Branding

Branding is a way of **identifying your organization**. It can include everything from a logo and org colors to your client service approach, signs, business cards, and printed materials. Good branding communicates an image of a professional, organized program to:

- Staff, including future staff (attract the best staff!)
- Clients, including future clients (show you are trustworthy!)
- New and potential funders (show you know what you are doing!)
- Wider community & the communities you serve (show who you are!)
- Your peers and community partners (show you are an expert!)

Do we *need* branding?

- Many nonprofits are skeptical about branding and marketing; we get that! It sometimes feels like it is serving funding over people
- However, branding can help give you credibility. You are doing good work and your story is worth telling. Part of how you can tell that story is by giving a consistent, clear image of who you are
- Branding quickly communicates your expertise and professionalism

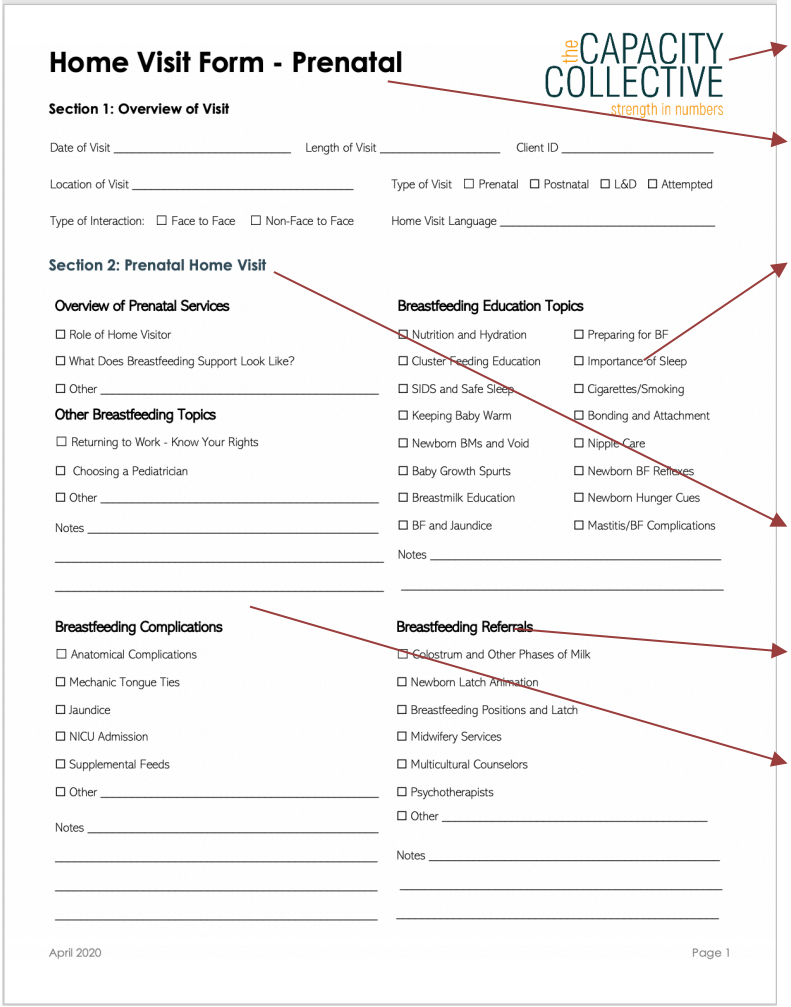
Keep Forms Organized

- Include a revision date in the footer and clearly communicate form updates
- Make sure most recent forms are easily accessible
  - Paper: have enough for 30 days in an easily accessible spot
  - Electronic: organize your digital workspace to keep forms findable
- Be sure you are always using the most recent version
  - Paper: shred outdated forms immediately
  - Electronic: archive old versions immediately

*See the **Improve Your Workflow: Get Organized with the 5S System** and **Improve Your Workflow: Organize Your Electronic Workspaces** emPower Tools*

Great Forms Are Consistent and Visually Appealing

- Set your clients and staff up for success by creating clear, clean forms that are easy to read and fill out. It should be visually clear what is important.
- Think of forms like a survey—be clear, and know your audience, so you can collect high quality, consistent data.



Home Visit Form - Prenatal

the CAPACITY COLLECTIVE
strength in numbers

Section 1: Overview of Visit

Date of Visit _____ Length of Visit _____ Client ID _____

Location of Visit _____ Type of Visit ☐ Prenatal ☐ Postnatal ☐ L&D ☐ Attempted

Type of Interaction: ☐ Face to Face ☐ Non-Face to Face Home Visit Language _____

Section 2: Prenatal Home Visit

Overview of Prenatal Services
- ☐ Role of Home Visitor
- ☐ What Does Breastfeeding Support Look Like?
- ☐ Other _____

Other Breastfeeding Topics
- ☐ Returning to Work - Know Your Rights
- ☐ Choosing a Pediatrician
- ☐ Other _____

Notes _____

Breastfeeding Education Topics
- ☐ Nutrition and Hydration
- ☐ Cluster Feeding Education
- ☐ SIDS and Safe Sleep
- ☐ Keeping Baby Warm
- ☐ Newborn BMs and Void
- ☐ Baby Growth Spurts
- ☐ Breastmilk Education
- ☐ BF and Jaundice
- ☐ Preparing for BF
- ☐ Importance of Sleep
- ☐ Cigarettes/Smoking
- ☐ Bonding and Attachment
- ☐ Nipple Care
- ☐ Newborn BF Reflexes
- ☐ Newborn Hunger Cues
- ☐ Mastitis/BF Complications

Notes _____

Breastfeeding Complications
- ☐ Anatomical Complications
- ☐ Mechanic Tongue Ties
- ☐ Jaundice
- ☐ NICU Admission
- ☐ Supplemental Feeds
- ☐ Other _____

Notes _____

Breastfeeding Referrals
- ☐ Colostrum and Other Phases of Milk
- ☐ Newborn Latch Animation
- ☐ Breastfeeding Positions and Latch
- ☐ Midwifery Services
- ☐ Multicultural Counselors
- ☐ Psychotherapists
- ☐ Other _____

Notes _____

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LOGO
Put the logo in the same place on every form and make it the same size. Find a logo version that is clear and fits on all forms needing to stretch, squish or distort it.

TITLE
Give every form a clearly understandable title. Also give each form a unique title. That way, when you say the name, everyone knows which one.

FONT
Use the same font on all forms. Headings should use the same font size in all forms. Body text also, usually slightly smaller than headings. Do not make the font size so small that people cannot read it! Fonts with serifs (tiny lines on the edges of letters, example: SERIF) are easier to read on printed forms. Sans serif fonts are easier to read online (example: **SANS SERIF).**

ORDER
Save your data entry staff a LOT of time and brain space: put the form fields in the same order as the database fields. Be thoughtful about what the client will experience as well. For example: answering similar questions at the beginning and end looks confusing and disorganized.

FLOW
For longer forms (like intake packets), use colors and/or icons to keep the flow going smoothly. Make directions clear, and word them carefully to help ensure accurate responses.

ACCENTS
Use **bold**, *italics* and/or underlining sparingly (with or without color) to draw the eye to important information that might otherwise get lost.

SPACING
Leave empty white space between sections and around the sides of the form, so the eye can travel around the form easily. Don't crowd information. Make the most important words/sentences easy to find with a quick scan.

CLIENT-CENTERED
Know your audience and create your forms accordingly. Be sure everyone can accurately complete the form. Do not use language that will be confusing or vague. For example, if you have clients who identify as gender nonconforming, but only have checkboxes for female and male, it will make the form difficult to complete, and can signal you don't care about them.