Intake Form Icebreaker

Form 1 | Form 2 | Form

How did filling out the form feel to you?

Form 1:
- Like I was completing the form wrong.
- **panicky :-/**
- demographic responses didn't capture many diverse identities
- irritated by the questions asked and the limited form functions
- Later questions felt invasive and could trigger traumatic responses

Form 2:
- Form was simple and low barrier, straight-forward for demographic data
- Work with a population who doesn't use email
- **Don't like forms in general**
- it was simple, low barrier

Form:
- I thought this intake form was very easy to complete. Simple and clear.

Is this a form that you would want to use as an agency?

Form 1:
- I probably have used forms like this before, and am looking forward to exploring ways to make these kinds of forms feel more welcoming and less invasive.

Form 2:
- No, I think it would result in a lot of different responses for the demographic elements you'd have to likely type in = a lot of time with data entry
- **Would be challenging on a phone**
- Room for a mobile-friendly version? There is so much data entry, things lost in translation, better to do this when speaking directly so client can see

Is this a form that you would like to complete as a client?

Form 1:
- No - feels tedious and invasive
- **not at all**

Form 2:
- Question about family members is vague, why are you asking and how will it be used?
- **Seemed inclusive for the most part to capture elements of identity**

Form Review Brainstorming

As a

service provider // program manager // funder

in order to

support my client // improve our services // locate my community

I need to know

[data point]

Parent Engagement Coordinator

Program Manager

program coordinator

Program Director

ome visitor

Program Manager

data analyst/ epidemiologist

assess program impact on clients & community; identify communities what communities we're serving or not serving

Child and family age

participant's support needs and family's goals

Name

Zip code

the family's needs

Age

Pertinent safety plan information

what policies and procedures are working well and what needs to be improved

Does the child have a disability or delay in any of the 5 domains of child development? Make sure they are eligible for program.

refer them to appropriate resources

Match client with the right community

See if client qualifies for other programs we offer

If they qualify for the program, or if they need to be referred to another program

connect them with an appropriate program

Collecting demographic information, regarding DOB, Zip code, and languages, to help connect to a case manager and the funder.

ensure the geographic area and referrals are usable, safe and relevant for the client

identify and understand disparities in services

Connect them with the right programs / supports / services

improve program services

Provide consent

Families concerns to referrer to the right place

Level of support each participant might need & their goals

parent's goals for their children

demographics, enrollment #'s, client experiences/reflections after receiving/completing services

Signature. (consent form)

Demonstrate your impacts
Celebrate impacts and ideas
Elevate stories and voices
Advocate for the communities you serve
Innovate in your programs

Why/When/How Practice

Data point:

family's needs	family's income level	Level of support each participant might need & their goals	level of support each participant needs and their goals	Ethnicity	Age and Delay and Diagnosis, and Ethnicity	Math proficiency	program impact/experience on participant

Why?

to be able to provide them with appropriate referrals	Connect them with the most appropriate programs / supports / services	to connect them with an appropriate program	Match client with the right community	customize curriculums and cater to students' needs	learn from experience to assess and improve components of program

absolutely essential? // follow through? // potential harm?

When?

within the first few visits	After the initial inquiry and before connecting them with a program	After initial inquiry and before connecting with program	2 weeks after programs start and 1 week before programs end	directly after post-program participation

timing // trust // need

How?

specific needs assessment administered in second visit	phone or in-person conversation	Pre and post-surveys	registration form, then ongoing conversation, family and participant in the platform that best works for them	post program evaluation survey

phrasing // reflecting values