Build Data Roots to Reach New Heights in Your Work:

Rethinking the Intake Process

Welcome!

Please complete the intake form according to your birth month.

https://thecapacitycollective.org/intake/

Have thoughts? Put them in the chat!

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Rethinking the Intake Process

October 24, 2023

the CAPACITY COLLECTIVE
strength in numbers

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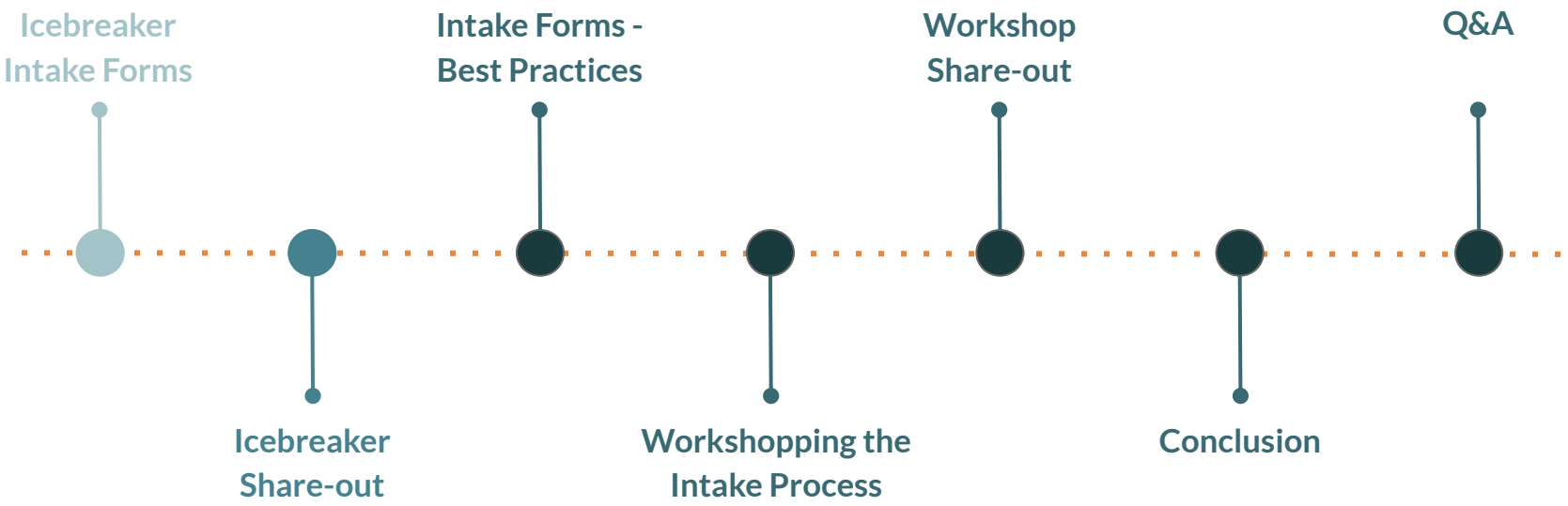
Meet Our Team

Em Carr
they/them
Senior Project Manager
Data Management

Meredith Williams
she/her
Director of Operations
Capacity Building

Today's Agenda



Icebreaker - Breakout Groups

- How did filling out the form feel to you?
- Is this a form that you would want to use as an agency?
  - Why or why not?
- Is this a form that you would like to complete as a client?
  - Why or why not?

Icebreaker

Share-out

Intake Forms: Why Do They Matter?

- First impression
- Sets tone
- Least edited
- Values in action
- Challenge data beliefs
- Community > Funder
- Strong relationships

Key Questions

- **Why** are you asking?
- **When** are you asking?
- **How** are you asking?

WHY are you asking?

- Who needs to know?
  - You?
  - Funder?
- Absolutely essential?
- Follow through?
- Potential harm?

WHEN are you asking?

- Right time?
- Do I have trust?
- Need to know?

HOW are you asking?

- Mode of collection
- Phrasing
- Reflecting values
- No ‘right answer’
- Recommendations:
  - Gather feedback at all levels
  - Make things optional
  - Informed consent

**emPower Tool*
https://thecapacitycollective.org/resources/empower-tools/

See our emPower tools for more information.

Exercise

Why, When, & How

WHY do we need to know this information?

WHEN do we need to know it?

HOW should we gather it?

Exercise: Why, When, & How

As a _____, I need to know

home visitor // program manager // funder

_____ in order to _____

[data point]

support my client // improve our services // advocate for my community

Practice in your groups!

Potential data points:

- Demographic Data
  - Race
  - Ethnicity
  - Gender
  - Age
  - Housing Status
  - …and more
- Pregnancy & Birth Information
  - Pregnancy History
  - Previous birth experiences
  - Health History
  - Current pregnancy risk factors
  - …and more
- Client Information
  - Family member/support people names & details
  - Other child names & ages
  - Access to transportation
  - …and more

Final Thoughts

- Data is a powerful tool
  - Use for good
  - Can cause harm
- Community are the owners of their data
- Ask yourself:
  - *Is this something I'd feel comfortable reading aloud or sharing back to my client?*
  - *Is this something I'd feel comfortable filling out myself?*

Questions?
Ideas?

Did you enjoy our presentation?

- Please make sure you **take the evaluation!**
  - Visit http://bit.ly/cctrainingeval
  - *We need your input!*

- Could your broader organization use a CC training? **Contact us!**
  - meredith@thecapacitycollective.org

- Follow us on **Social Media!**
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Thank you!

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Resources: www.thecapacitycollective.org/intake