

Filling the Gaps in your Service Insights Data

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Last revised by: Jake K

Introduction

Service Insights can provide each partner with valuable information on their activities. However, because many fields are optional and clients have limited time and patience to answer questions, it may take some time to build a detailed dataset. **This guide will explain how to complete more questions during intake and build more complete client profiles.**

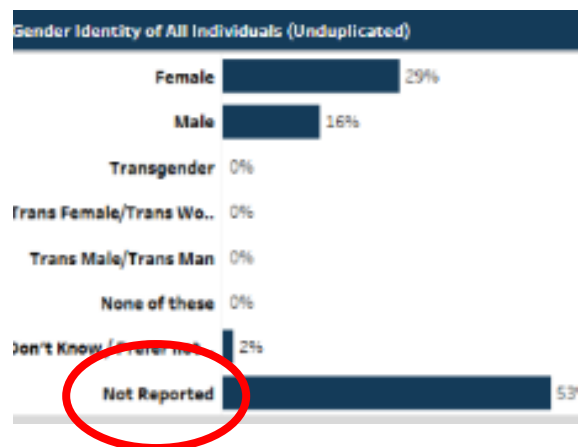
Progressive Intake

Service Insights is designed with client patience and energy in mind. This is why users are not prompted to ask clients every question on their first visit to your pantry. Instead, you'll ask clients for the most necessary information upon the first visit, and other questions at later visits. This system is known as *progressive intake*. By the third visit, clients will have been asked all the questions, though they will be prompted to verify their information at regular intervals.

Household Member Demographic Information

One "blind spot" you may notice early on while using Service Insights is around client demographic information. If you view your Individual Demographics report, you may notice that a large proportion of clients have no gender or race/ethnicity listed.

This is because gender and race/ethnicity are required for the head of household, but optional for household members.



To add gender and race/ethnicity information for a household member, select "Additional Info" below their name to reveal these fields.

Adults

Status: Active ?

First Name: Pearl Middle Name (Initial): Last Name: Krabs

Suffix: Select Date of Birth: 2/9/2005 OR Age: 18

[Additional Info](#) ▼

Setting Small Goals

Consider having your staff or volunteers prioritize one question or field every month to expand your records over time.

Example: in March, volunteers ask clients to specify the genders of everyone in their household. In April, volunteers ask each household about their dietary preferences. In May, volunteers ask them about their military status, and so on.

Generally, it is easier to collect this information over time rather than all at once during a client's initial visit so that the process does not become cumbersome for them.

Why fill the gaps in Service Insights data?

CAFB does not require partners to complete all optional fields in their client records. However, having a more complete dataset offers you more information about your community; you may find this information useful in applying for grants, reporting to CAFB, or communicating with your organization's leadership and board.

We respect our clients' choice to decline answering any optional questions, but we will still give everyone the opportunity to share their info if they are comfortable doing so.

If you are interested in learning more about how to turn your data into action to help your clients, please reach out to ServiceInsights@capitalareafoodbank.org.

Example

Good Harvest Food Pantry receives a large grant from their county to fund their operations. The county has notified them that, beginning on July 1, they must begin reporting on the gender and race/ethnicity of all clients served – not just the heads of households.

In January and February, the pantry volunteers begin to ask clients to specify the genders of members of their household, since this information was not required in the original intake process.

In March and April, the volunteers ask clients about the race/ethnicity of household members. By the end of the spring, the pantry has gathered gender and race/ethnicity data on all their clients.

Questions?

Contact ServiceInsights@capitalareafoodbank.org for help!