

Orientation to Service Insights

Digital Client Intake at Your Pantry

Introductions

- Tell us a bit about yourself and your organization
- Why are you interested in Service Insights?





Orientation Agenda:

1. Goals for Today
2. Service Insights – the Whats and Whys
3. How it Works
4. Demonstration
5. What's Next?



Our Goals

You will ...

- Understand how the Service Insights system works
- Understand your options for using Service Insights at your pantry
- Learn how CAFB will support your use of Service Insights
- Feel confident in explaining Service Insights to your clients and fellow volunteers/staff
- Know what steps to take next
 - You'll get everything in a follow-up email

What is Service Insights (SI)?



Service Insights is an initiative for food banks across the country to equip themselves with information tools to learn more about the communities we serve.

We can't meet the needs of our community if we don't understand them.

unduplicated data to drive decision-making

Service Insights is Digital Client Intake



The screenshot shows a web application interface for digital client intake. At the top, there is a dark blue header with a menu icon, 'Home', 'English', and a user profile 'VATefapPractice User'. Below the header, a dark blue banner contains a warning icon and text: 'Test Environment This is a test and training environment only. Please do not use this environment for live intake or activity.' The main content area has a dark blue background with the word 'Intake' in white. To the right of 'Intake' is an orange button labeled '+ Add New Household'. Below this is a search bar with a dropdown menu labeled 'Name' and a search icon. At the bottom right, there is a 'Visit Date' field with a calendar icon and the date '4/22/2022'.

- Client intake is collecting basic demographic data from people receiving food
 - Such as: name, age, ethnicity, household members
- Service Insights is client intake using a computer system – quick, fast, and easy! You'll get up-to-the-minute reports on your impact.
- The system is developed by Feeding America specifically for food banks and food pantries

Benefits to You, Our CAFB Partners

- Minimize paperwork
- Track food and non-food services in one system
- Use reports to easily provide info for grants
- Order more appropriate food for your pantry
- Analyze and change your outreach
- Ongoing system support from CAFB



How will CAFB use the data collected?

- Procure food for all our cultures, age groups, and health conditions
- Better serve areas without enough food resources
- Provide grants to partners serving focus populations
- Advocate for clients in local & federal government
- And more – all in the service of our community





Data Usage

Service Insights provides more insight on our communities by collecting additional information.

This information can be used by:

- ▀ Capital Area Food Bank
- ▀ Feeding America
- ▀ And you, our partners.



Service Insights is Secure

All information in Service Insights is powerfully protected and encrypted.

No personal information will ever be shared with anyone outside of our partner network.

We will never share personal info with agencies like law enforcement and immigration services.

Clients are not required to provide their information in Service Insights in order to receive food or services.

Let's see a quick preview!



How it Works



Technical Requirements

- Service Insights is web-based – we can use laptops, tablets, and/or smartphones connected to the internet

- Compatible internet browsers
 - Safari (iPads and iPhones)
 - Google Chrome
 - Mozilla Firefox
 - **NOT recommended:** Internet Explorer, Microsoft Edge, Silk (sometimes found on Kindle tablets)



Clients only need to register one time in Service Insights.

Clients are not registering at your site; they are registering in the CAFB Network.

All Partners using the system will work together to keep clients' info updated.







Partners should start fresh collecting information from clients during your distribution.

When you collected clients' info before, they did not know that you might enter it into the Service Insights system.

Informing Clients about SI

- Start informing clients before you start using Service Insights
- Use our flyer or your own

	
<p>We are transitioning to Service Insights, a paperless intake system, starting on</p> <hr/>	<p>We are transitioning to Service Insights, a paperless intake system, starting on</p> <hr/>
<p>The wait time for food may increase because we will need to register each household.</p>	<p>The wait time for food may increase because we will need to register each household.</p>
<p>Thank you for your patience and understanding!</p>	<p>Thank you for your patience and understanding!</p>
	



YOUR DATA YOUR RIGHTS

This pantry is switching to an electronic system to do its intake process. This means that all information that was previously collected on paper will now be saved electronically. This is a big change for this pantry, for the food bank, and most importantly for you! We understand you may have some questions and we have tried to answer them for you below. If you want to know more, you are encouraged to talk with the staff at your local pantry.

WHY THE CHANGE?

The Capital Area Food Bank is pleased to collaborate with this local pantry to modernize the intake process. By taking part in this new process and answering a few questions, you will help us reduce wait times for return visits to this pantry and help us make smarter decisions on how to serve your community.

SO WHAT'S THE NEW SYSTEM?

The system is called Service Insights. It is an electronic information tool that makes it easier for pantries to manage information about the community they serve while fulfilling any reporting requirements.

DO I HAVE TO PROVIDE MY INFORMATION?

No, but in order to receive USDA/TEFAP (The Emergency Food Assistance Program), we will need to know the following information:

- First and last name
- Address
- Number of people in your household
- Your monthly income OR if you participate in any assistance programs such as SNAP/food stamps, TANF, etc.

We will also ask about your race or ethnicity, and the names and ages of your household members. You are not required to answer these questions to receive TEFAP, but we hope that you will choose to answer them.

WILL I HAVE TO DO THIS EVERY TIME?

No. Using Service Insights allows us to store your information electronically and make future visits quicker. We will just ask you to verify and update your information from time to time.

Questions or concerns? Email us at ServiceInsights@capitalareafoodbank.org



Together we can solve hunger

Translations Available

- English
- Spanish
- Amharic
- Arabic
- Dari
- Farsi
- French
- Korean
- Mandarin
- Oromo
- Pashto
- Polish
- Tagalog
- Urdu



What if someone doesn't want to register?

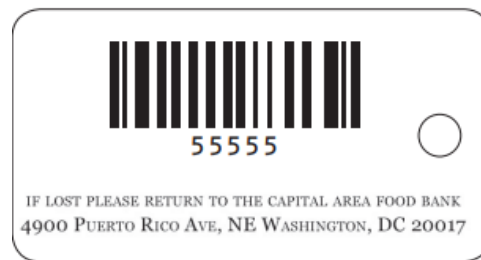
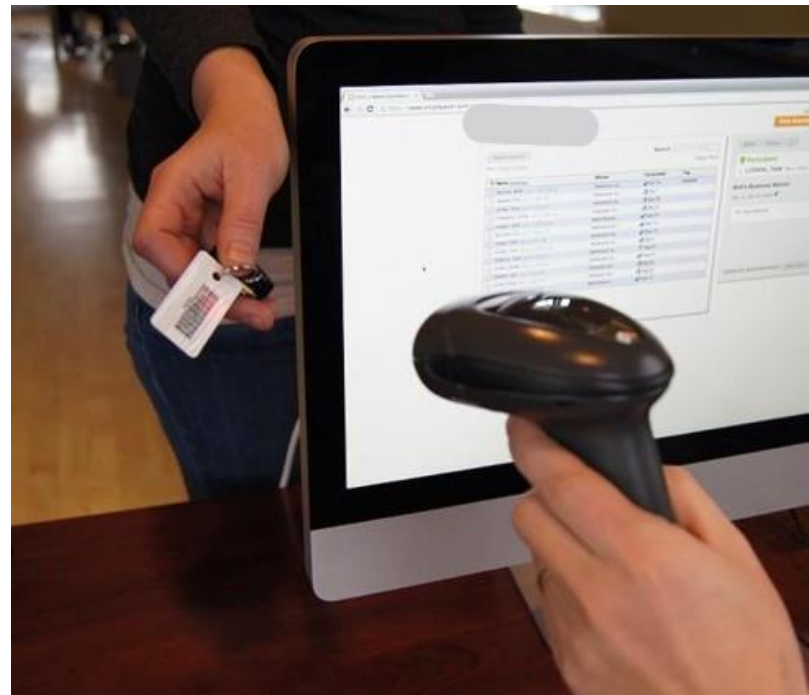
We will record whatever amount of info they are comfortable with.

If someone does not want to sign up in Service Insights at all, they should still receive food.



CAFB provides equipment to support you!

- One laptop (if needed)
- A barcode scanner
- Keycards for your clients



Expectations of CAFB



- Set up your organization in Service Insights
- Create users for all your volunteers using SI
- Help strategize how to use SI at your site
- Assist at your site when you “go live”
- Continuous system support



Do we have to register everyone at once?!

- No one expects you to register all your clients at one time!
- Consider a goal for each distribution day
 - Ex: “We’ll register 10 clients at each distribution.” “We’ll register every third person in line.”
- Let’s start communicating with clients about the new intake system coming soon



Service Insights Demonstration

Service Insights demonstration includes:

- Logging in
- Tour the website layout
- Search for a client
- How to create a new client profile
- Return visits
- Possible duplicates
- Spur-of-the-moment events
- Anonymous Visits





Service Insights Test Site

<https://training.neighborintake.org/home>

Welcome

Email or Username

Password

Sign In

Training the Team



- Share the video of this training with volunteers
- and/or**
- Set a date for you to train volunteers in person
- Share test site login and ask all volunteers to practice
- Share how SI will benefit your organization
- The CAFB team can help answer their questions or concerns

- **We'll meet about reports when you have data in your system!** (a few weeks from now)

- Types of data you'll get in reports:
 - # of households and individuals served
 - Age groups served
 - Areas where your clients live



Starting with Live Client Intake

CAFB
Recommended!

Live client intake means that you are asking clients questions and entering their information directly into Service Insights while they are present.

- You can go paperless
- Less work after the distribution ends
- Greatly increases accuracy of info

Benefits



- Multiple devices
- Multiple volunteers using SI
- Space for conversation with clients (w/privacy)

Required



Starting with Paper Intake

Paper intake means that you ask clients to complete paper forms and enter their info into Service Insights after your distribution ends.

- Less close contact with clients
- Can make the line go faster

Benefits

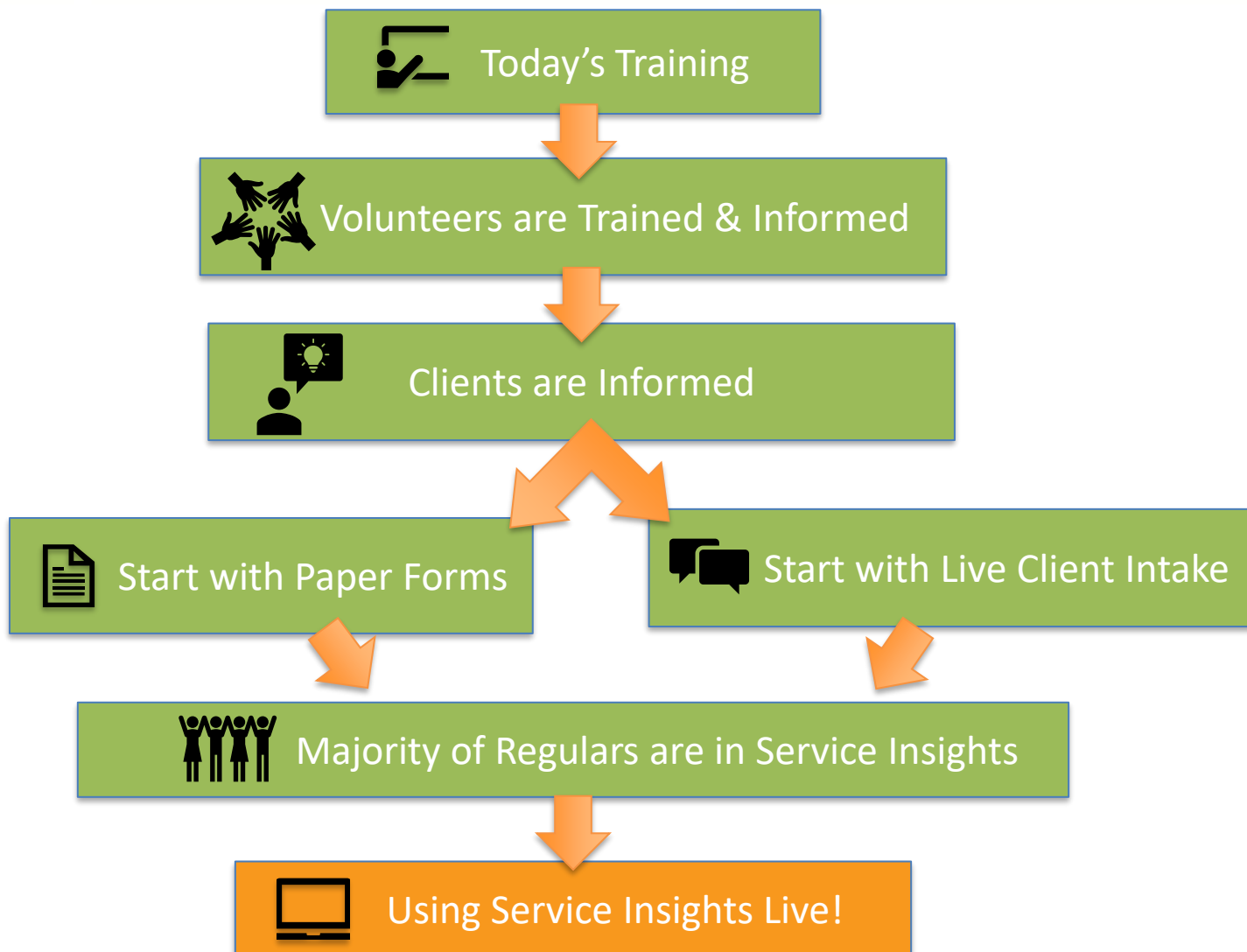


- More volunteer time after the distribution
- Need to check completed forms carefully before client leaves!

Required



The Onboarding Process





Goals after today's training

- Each volunteer should log into the test site and create at least **3 fake client profiles & record visits**. Have fun with it!
- I will email this presentation, your User Manual, and an online form for you to complete.
- **I will follow up with your Agency Manager in about 1 week to see how it's going!** 😊 We'll schedule a time for you to receive your laptop and barcode scanner.
- You will consider...
 1. Will you start with paper intake forms or live intake?
 2. When will your volunteers receive training?
 3. When will you start sharing info about SI with clients?
- We'll decide when you want to "go live" with SI. I'll be there to help! We can strategize together how you'll incorporate SI at your pantry.