



# Strategies for Proficient Client Intake

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# Introductions



**Pat Jew**

*Data Quality and Control Manager*



**Josie Boyle**

*Curriculum Manager*



**Matthew Robinson**

*CTN learner*



# Agenda

- Introduction
- Goals of client intake
- Data collection: purpose & best practices
- Meeting the learner where they are
- Mock intake interview with Matthew
- Q&A & Raffle

# Goals of Client Intake

- Data
  - For internal use and reporting
- Rapport
  - Break the ice and start to build trust
- Assessment
  - What are your client's goals and needs?



# Why Track Data?

- Identify needs
- Measure impact and success of program
- Identify areas to improve
- Report to funders and other stakeholders
- Raise funds and awareness
- Foster accountability
- Tell your story

Intake Interview

Pre-Assessment

Activity Report

Post-Assessment

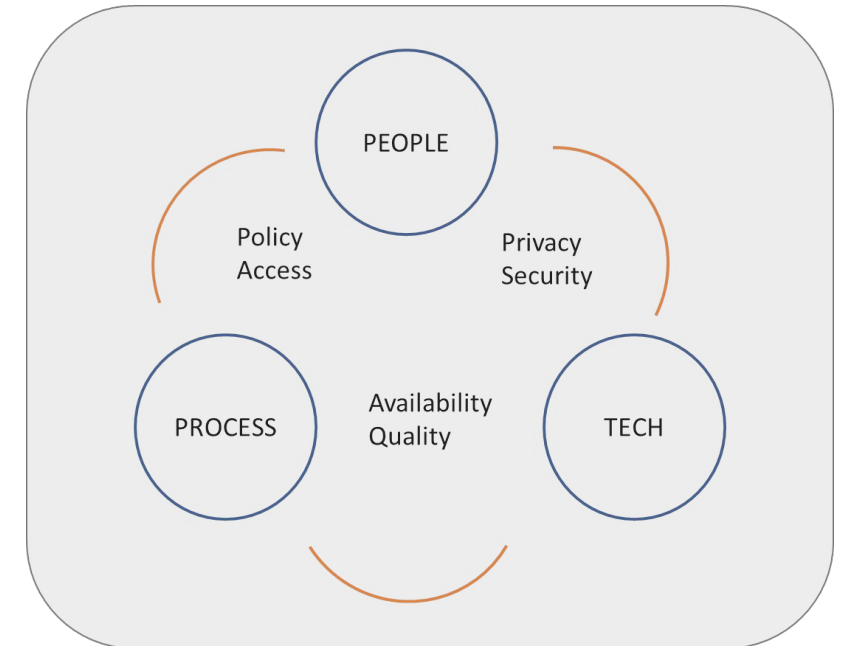
Feedback Survey



# Data Collection Best Practices

Identifying guidelines for optimal methods of data input will:

- ★ Establish robust reporting to funders and partners
- ★ Allow for program analysis
- ★ Save time from continual data cleaning



## Practices

- Identify simple and efficient method for data collecting
- Build reports for regular check in of participant status
- Provide resources for staff: training, reference material, point of contact for questions
- Clarity on expectations

# Meet your clients where they are

- Goals and motivations
- Background and existing skills and knowledge
- Strengths / assets
- Needs
  - Tech support
  - Skills training
  - Internet connectivity
  - Devices



# Important considerations

- Mode of intake
  - In person
  - Over the phone
  - Self-report (via online or paper form)
- Familiarity and level of trust with your organization
- Specifics of your program and/or services
  - How does intake fit into your overall process flow?



# Mock Intake Interview: Josie & Matthew

The context:

Matthew was referred to our program by the local library. In this program, after confirming his interest and verifying information, we will mail Matthew an iPad and training booklet. He can do optional training either virtually one-on-one with me, in person at the library, and/or attend virtual Q&A sessions. If needed, I can also help him apply for the ACP (Affordable Connectivity Program) and sign up for home internet.





## Q&A

Post your questions via the chat





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**Thank you!**