



Client Registration Data Changes

January 13, 2021

Thank you for joining!

We will begin the presentation at 11:00 a.m.

Agenda

- Welcome: Nancy Nagel
- Client registration changes: Holly Cohen
- Training your volunteers: Jacquieia Jones

Format:

Due to the large number of participants, you have been muted. Have questions during the presentation? Please enter them questions into “Q&A” (not “Chat”).



Thank you

**for your continued dedication to
making sure our clients have the food they need!**

Together with you we are serving 500,000 people,
twice as many as before the pandemic – our
community needs you and you are showing up!



Client Registration Changes

Holly Cohen,
Client Marketing and Program Evaluation



Client registration changes to data collection

Changes to client data collected will be introduced **next Tuesday, January 19, 2021**

- Minimize collection of Personally Identifiable Information (PII)
 - Birth year instead of birthdate
 - # of people in household (#children/ #seniors/ #adults) instead of ages of all family members
- Add: Consent to send text messages
- Add: Race/Ethnicity
- Remove: “Are you new”



Where will you see changes?

- Paper Client Registration Form
- Online registration via tablets
- Roster



Updated Client Registration Form



Client Registration Form

Site: _____

Date: _____

Second Harvest Client ID	First and Last Name	Birth year (or age)	Address Street / City / Zip Code	Cell Phone Number Confirm ok to text	Preferred Language - (check one)	People in Household			Race/Ethnicity of Head of Household (check all that apply)	
						# children (0-18)	# seniors (60+)	# adults (19-59)		
M1234	Mary Jenkins	1980	1234 Longview Drive San Jose 95125	408-333-3333 Can we text? <input checked="" type="checkbox"/> Yes	<input type="checkbox"/> English <input type="checkbox"/> Spanish <input type="checkbox"/> Vietnamese	3	2	1	<input checked="" type="checkbox"/> Asian <input type="checkbox"/> American Indian or Alaska Native	<input type="checkbox"/> Middle Eastern or North African <input type="checkbox"/> Native Hawaiian or
				Cell phone #: Can we text you? <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> English <input type="checkbox"/> Spanish <input type="checkbox"/> Cantonese <input type="checkbox"/> Mandarin <input type="checkbox"/> Tagalog <input type="checkbox"/> Vietnamese <input type="checkbox"/> Other _____				<input type="checkbox"/> Asian <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Black or African American <input type="checkbox"/> Hispanic, Latino, or Spanish origin	<input type="checkbox"/> Middle Eastern or North African <input type="checkbox"/> Native Hawaiian or Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Other _____ <input type="checkbox"/> No answer or declined
				Cell phone #: Can we text you? <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> English <input type="checkbox"/> Spanish <input type="checkbox"/> Cantonese <input type="checkbox"/> Mandarin <input type="checkbox"/> Tagalog <input type="checkbox"/> Vietnamese <input type="checkbox"/> Other _____				<input type="checkbox"/> Asian <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Black or African American <input type="checkbox"/> Hispanic, Latino, or Spanish origin	<input type="checkbox"/> Middle Eastern or North African <input type="checkbox"/> Native Hawaiian or Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Other _____ <input type="checkbox"/> No answer or declined
				Cell phone #: Can we text you? <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> English <input type="checkbox"/> Spanish <input type="checkbox"/> Cantonese <input type="checkbox"/> Mandarin <input type="checkbox"/> Tagalog <input type="checkbox"/> Vietnamese <input type="checkbox"/> Other _____				<input type="checkbox"/> Asian <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Black or African American <input type="checkbox"/> Hispanic, Latino, or Spanish origin	<input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Native Hawaiian or Pacific Islander <input type="checkbox"/> Middle Eastern or North African <input type="checkbox"/> Other _____ <input type="checkbox"/> No answer or declined
				Cell phone #: Can we text you? <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> English <input type="checkbox"/> Spanish <input type="checkbox"/> Vietnamese <input type="checkbox"/> Mandarin <input type="checkbox"/> Cantonese <input type="checkbox"/> Tagalog <input type="checkbox"/> Other _____				<input type="checkbox"/> Asian <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Black or African American <input type="checkbox"/> Hispanic, Latino, or Spanish origin	<input type="checkbox"/> Middle Eastern or North African <input type="checkbox"/> Native Hawaiian or Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Other _____ <input type="checkbox"/> No answer or declined



Client Registration Form

Client ID	First and Last Name	Birth year (or age)	Address Street / City / Zip Code
M1234	Mary Jenkins	1980	1234 Longview Drive San Jose 95125

Field	Why do we need this information?
Client ID	Second Harvest identifier (created by Second Harvest) NOT the old BB or FH ID
First and last name	Identifies the client Avoids creating duplicate client records
Birth year (or age)	Identifies the client Avoids creating duplicate client records
Address – zip code is critical	Avoids creating duplicate client records Helps us evaluate where to offer services



Client Registration Form

Cell Phone # OK to text?	Language - (check one)	People in Household			Race/Ethnicity of Head of Household (check all that apply)	
		# children (0-18)	# seniors (60+)	# adults (19-59)		
408-333-3333 Can we text? <input checked="" type="checkbox"/> Yes	<input type="checkbox"/> English <input type="checkbox"/> Spanish <input checked="" type="checkbox"/> Vietnamese <input type="checkbox"/> Mandarin	3	2	1	<input type="checkbox"/> Asian <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Black or African American <input type="checkbox"/> Hispanic, Latino, or Spanish origin	<input type="checkbox"/> Middle Eastern or North African <input type="checkbox"/> Native Hawaiian or Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Other _____ <input type="checkbox"/> No answer or declined

Field	Why do we need this information?
Cell phone	Enables us to reach clients when needed
OK to text?	We want to be sure clients are ok receiving text messages from us
Preferred language	We will send text messages in the client's preferred language
#children / #seniors / #adults	A reporting requirement Helps us understand household size and who we are serving
Race/ethnicity	Helps make sure that we are reaching every segment of our community and that they are getting excellent service from us



Online Registration (Tablet)

New Client Details

First Name

Last Name *

Birth Year

Street Address

City

Zip

Cell phone

Can we text?
 Yes
 No
 No Response

Preferred Language
 English Spanish Vietnamese
 Mandarin Cantonese Tagalog
 Other No response

of Children (0-18)

of Adults (19-59)

of Seniors (60+)

Race/Ethnicity (Select all that apply)
 Please select...
 Asian
 American Indian or Alaska Native
 Black or African American

Changes

Create New Client



When to use the form?

All clients who are **new to a site** should be entered on the Client Registration Form

- Brand new client: Complete entire row
- Existing client with Client ID card but new to the site: Write down Client ID#, Name, and Phone number - leave all other fields blank



The image shows a client ID card for Second Harvest of Silicon Valley. The card features the organization's logo on the left, which consists of a stylized orange and white wheat stalk inside a circle. To the right of the logo, the text reads "SECOND HARVEST of SILICON VALLEY". Further to the right, a white box contains the instruction "Bring this card to pick up groceries!". Below this instruction, there are three horizontal lines for entering information, labeled "Name:", "Phone:", and "Client ID:".



Updated Roster



SECOND HARVEST
of SILICON VALLEY

SITE:
Site #:
DATE:

HH ID	First Name	Last Name	Phone #	Attend	OK to Text	Notes
M2222	Joe	Smith	650-333-3333		Y	
M65432	Ale	Gonzalez	408-222-2222			
M34500	Vu	Tran	925-555-5555		N	



Training Your Volunteers

Jacqueia Jones,
Regional Program Manager



Training your registration volunteers

Field	What should the registration volunteer ask?
Client ID	Has the client been to a Second Harvest distribution? Are they new to this site? Ask for their Client ID card
First and last name (required)	What is your first and last name?
Birth year (required)	In what year were you born? We need to know this so we don't confuse you with someone else with the same name.
Address (zip code required)	What is your home address?
Cell phone	What is your cell phone number (or home number, if no cell phone number)? We will use this if we need to reach you.
OK to text?	Is it ok if we text you? We will send text messages to let you know about changes at the distribution. And will occasionally ask questions about your experience receiving food from us.



Training your registration volunteers

Field	What should the registration volunteer ask?
Preferred language	What language do you prefer? We will send you text messages in this language.
# of people in household (required)	How many people, including yourself, are in your household? How many children 18 and under? How many seniors 60 and older? How many adults 19-59?
Race/ethnicity	Second Harvest is committed to equity, so we would like to know your race/ethnicity (read the list, or examples as needed). This information helps make sure that we are reaching every segment of our community and that they are getting excellent service from us.



Training your registration volunteers

Tested the new Client Registration Form in December.

Some tips and tricks:

- Need to fill in zip code (our system doesn't auto-fill)
- Explain to clients that they will receive texts about the distribution and sometimes about their experience getting food
- Household information: Children 18 and under > Seniors 60 and older > Adults 19-59
- Volunteers are hesitant to fill in race – need to explain why
 - Emphasize “head of household only”
 - Likely need to prompt clients with options



Tools and training materials

<https://www.shfb.org/partner-resources/> under Registration



About the Client Registration Form

Thank you for helping clients get registered for free groceries!

We have made several changes to the Client Registration Form. Please begin using the new form immediately. Please see the back of this for information about how to complete the form – and for answers to questions you may get from clients. Changes:

- **Asking for Birth Year** instead of asking for birthdate
- **Added “Confirm ok to text”** to make sure clients consent to receiving text messages from us.
- **Changed People in Household.** Collect # children, # adults, and # seniors in the client’s household
- **Added Race/Ethnicity** to better understand whom we are and are not serving and therefore make effective adjustments.

The Client Registration Form should be used for all clients who are new to the site:

- If a client has never attended a Second Harvest distribution, complete an entire row of the form.
- If a client has a Client ID card from another site (with an ID starting with “M” – not an old BB or FH member card!) but has never attended this site, you only need to write down their Client ID#, Name, and Phone number. **Leave all other fields blank.**

Why is it so important to completely fill in the row of the form for each new client?

- We cannot enter the client into our database without adequate information. Without all the info, we will not have a record that they attended, and may not provide the right amount of food for the next distribution(s).
- We need to know how to contact the client when there are service changes or to provide reminders/notifications.
- We need to know what language the client prefers, so we can send them text messages in that language.
- We use the information to refine our services (and create new services!) to better meet client needs.
 - Different ages may have different needs
 - Different outreach approaches may be needed to reach underserved populations
- Bottom line, providing the information in the form will help us to provide great customer service to our clients.

A few specifics about the form

- No documentation required. Clients need only tell us that the information they have provided is correct.
- We are not a government agency. Individual information will not be shared with anyone except Second Harvest and our partners.

What if a client doesn’t want to provide information?

- First, explain why we need the information. Clients almost always provide the information if they understand why we need it. There are explanations on the reverse side of this sheet.
- We need to get enough information to identify a client so we can record them as receiving food: First and Last Name, Birth Year, Zip Code, and # of People in Household.
- We have been very careful to ask for the minimum information needed to serve our clients.

January 2021



Completing the Client Registration Form

Field	What should the volunteer ask?	What to write down?	Why do we need it?
Client ID	The only reason to ask for Client ID is if a person has a Client ID <u>card</u> , <u>but</u> is not on the roster.	If a client brings a Client ID card but is not on the roster, write down the Client ID# so we can find them in our database.	Every household has a unique Client ID so we can identify them.
Required: First and Last Name	What is your first and last name?	Write down the client's first and last name.	Helps us to make sure we don't duplicate client records.
Required: Birth Year	In what year were you born?	It is ok to record either the client's birthyear OR age.	Helps us to make sure we don't duplicate client records.
Address Zip code is required	What is your home address?	Write down the client's address. If they do not want to provide an address, get their zip code. If client is homeless, write "Unhoused."	Helps us to make sure we don't duplicate client records. Helps us to evaluate where we need to offer services.
Cell Phone	What is your cell phone number? We will use this if we need to reach you.	Cell phone preferred. If they don't have a phone number, leave blank.	Enables us to reach clients when needed: <ul style="list-style-type: none"> • Change in distribution day/time • Reminders and notifications
Confirm ok to text?	Is it ok if we text you? We will send text messages to let you know about changes at the distribution. And will occasionally ask questions about your experience receiving food from us.	After you get a cell phone number, ask the client if it is ok to text him/her.	We want to be sure clients are ok receiving text messages from us
Preferred language	What language do you prefer? We will send you text messages in this language.	In what language does the client like to receive text messages?	We will send text messages in the client's preferred language. We will also do our best to print flyers in this language and get a volunteer who speaks the language at the site.
Required: # of People in Household	How many people, including yourself, are in your household? How many children 18 and under? How many seniors over 60? How many adults 19-59?	Write down number of children 18 and under, number of seniors, 60 and over, number of adults 19-59.	We need to report on the demographics of the people we are serving. Helps us to understand household size and what kinds of families we are serving (e.g., multi-generation, seniors).
Race/ethnicity	Second Harvest is committed to equity, so we would like to know your race/ethnicity (read the list, or examples as needed). This information helps make sure that we are reaching every segment of our community and that they are getting excellent service from us.	Mark Race/Ethnicity for the Head of Household (not the entire family). Check all boxes that apply.	helps make sure that we are reaching every segment of our community and that they are getting excellent service from us.



Translations to help during registration

ENGLISH	SPANISH
<ol style="list-style-type: none"> 1. Hello! 2. How are you today? 3. Welcome! 4. Thank you 5. You're welcome 6. First name 7. Last name 8. Birth date 9. Address 10. Cell phone number 11. Can we send you text messages? 12. In your house, how many children under 18 years, over 60, and adults? 13. What is your race or ethnic background? 	<ol style="list-style-type: none"> 1. Hola! 2. ¿Cómo se encuentra hoy? 3. Bienvenido! 4. Gracias 5. De nada 6. Primer Nombre 7. Apellido 8. Fecha de Nacimiento 9. Dirección 10. Número de teléfono celular 11. Podemos enviarle mensajes de texto? 12. En su casa, cuántas personas son niños, mayores de 60 años y cuántos adultos? 13. ¿Cuál es su grupo étnico?
VIETAMESE	MANDARIN
<ol style="list-style-type: none"> 1. Xin chào! 2. Hôm nay bạn thế nào? 3. Xin đón chào! 4. Cảm ơn 5. Không có chi. 6. Tên 7. Họ 8. Ngày sinh 9. Địa chỉ 10. Số điện thoại di động 11. Chúng tôi có thể gửi tin nhắn cho bạn được không? 12. Trong nhà của quý vị, có bao nhiêu trẻ em dưới 18 tuổi, trên 60 tuổi và người lớn? 13. Nền tảng dân tộc 	<ol style="list-style-type: none"> 1. 您好 (Nǐ hǎo) 2. 您今天好嗎? (Nǐ jīntiān hǎo ma?) 3. 歡迎! (Huānyíng!) 4. 謝謝 (Xièxiè) 5. 別客氣 (Bié kèqì) 6. 名字 7. 姓氏 8. 生日 9. 地址 10. 手機號碼 11. 我們可以發簡訊給您嗎? 12. 府上有幾個未成年人, 超過六十歲的長者, 和介於其間的成年人? 13. 種族背景



What's next?

- Before your next distribution, your Program Manager will contact you to see if you have any questions
- At the first distribution **on or after January 19**
 - Train your Registration Volunteers on the new Client Registration fields
 - Begin using the updated Client Registration Form
 - Your Green Mail Bag will contain the updated Client Registration Form. Please recycle old forms
- Registration materials are stored at <https://www.shfb.org/partner-resources/> under Registration

Contact your Program Manager with *any* questions



Questions?

