



SERVICE INSIGHTS INITIATIVE INTRODUCTORY CALL

Central Texas Food Bank Service Insights Team

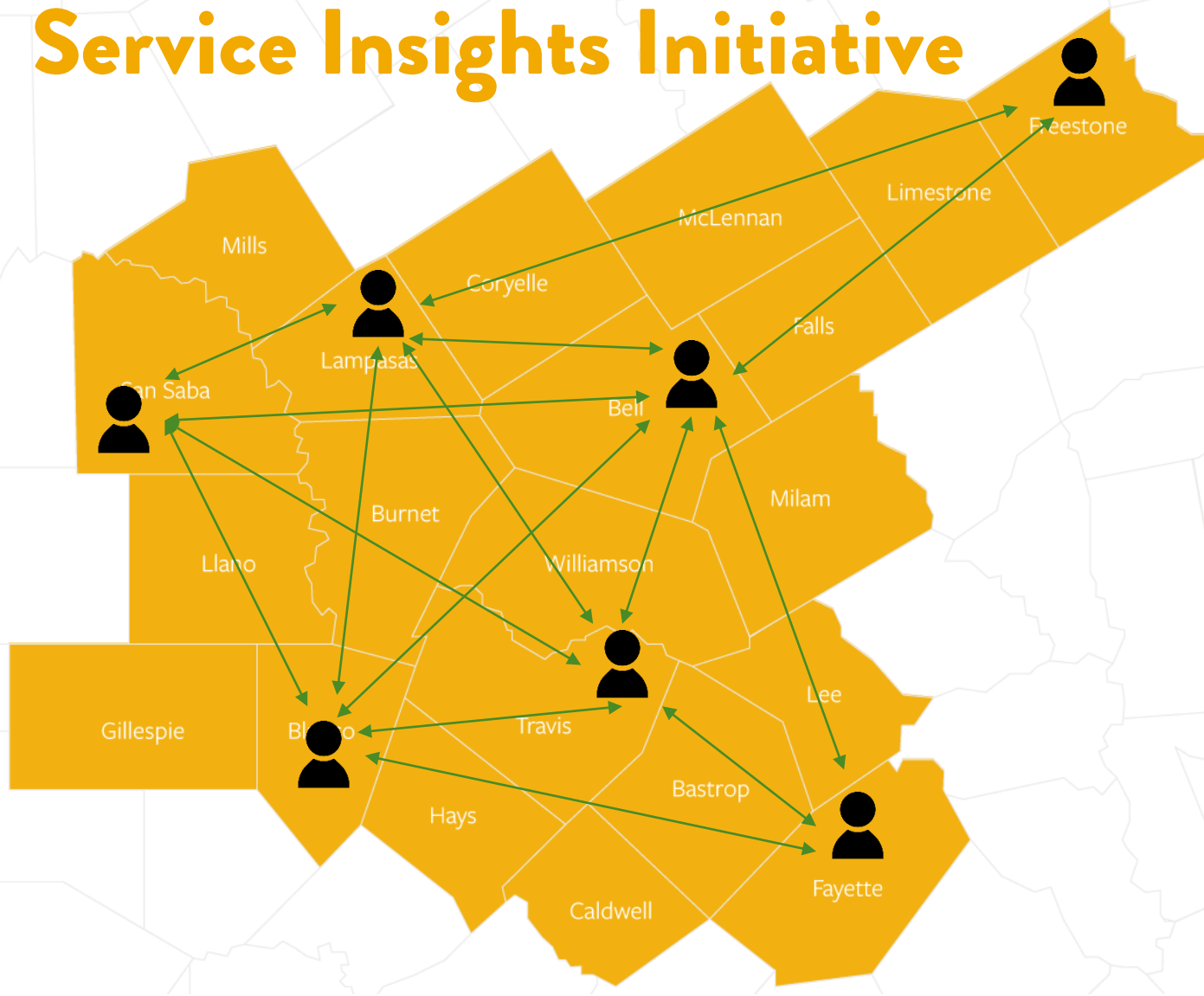
Agenda

1. Welcome
2. What is Service Insights?
3. Upcoming Changes to Oasis Insight in November
4. Training & Support
5. CTFB Service Insights Web Portal
6. Wrap Up / Next Steps



The mission of the Central Texas Food Bank is to nourish hungry people and lead the community in the fight against hunger.

Service Insights Initiative



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Service Insights Initiative – Client Data Tracking

- Network-wide client data tracking project
- Goal: to have standardized, electronic data on 80% of our clients across the network
- Benefits to Network
 - Unduplicated client counts
 - Better understanding of client characteristics
 - Understand how clients move across programs and partners
 - Understand gap in services and locations
 - Understand true impact of each Partner and network
 - Streamline client intake and TEFAP certification
 - CTFB directing resources more effectively within our network



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Participating in Service Insights

1. Collect standardized, electronic client data across network
2. Share client data with CTFB
 - CTFB will be able to pull reports directly from Oasis Insight
3. Abide by CTFB Data Privacy Requirement

We are introducing a Service Insights Participation Agreement as an addendum to your Partner Agency Agreements



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Service Insights: Key Dates

October – November 2020

CTFB Network Survey

December 2020 –
May 2021

Develop rollout strategy with partner feedback from Data Workgroup and NAC

June – October 2021

Develop technology solutions and prepare network for rollout

November 15, 2021

Launch SI for current Oasis Insight Users



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Service Insights: Key Dates

December 2021 –
May 2022

Launch SI for:

1. PAs who demonstrate “high readiness” for SI
 2. PAs on a different system
 3. CTFB-run programs (MPs and CSFP)
-

June – Dec 2022

Launch SI for:

1. PAs who demonstrate “moderate” readiness
 2. Remaining HOPE and CSFP Sites
 3. Solutions for Meal Sites
-

Future

Launch SI for remaining PAs and Children’s Programs



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Thank you to the Advisory Partners

SI Data Workgroup

Bastrop County Emergency Food Pantry	Tresha Silva
Caritas of Austin	Cynthia Hernandez
El Buen Samaritano	Amanda Doenges
Foundation Communities	Rita Ortega-Wiley
Giddings Food Pantry	Gene Parker
Hill Country Community Ministries	Tiesa Hollaway
Hutto Resource Center	Donna Jones
Shepherd's Heart - Waco	Bob Gager

Network Advisory Council

Bastrop County Emergency Food Pantry	Tresha Silva
Caritas of Waco	Alicia Jallah
Family of Faith Worship Center	Ruben Andrade Jr.
Food Care Center	Raymond Cockrell
Foundation Communities	Aaron DeLaO
Hays County Food Bank	Eleanor Owen-Oshan
Helping Center of Marble Falls	Sam Pearce
Helping Hands Ministries	Tasha Roberts
Hill Country Community Ministries	Tiesa Hollaway
Lampasas Mission	Charlotte Holland
River of Life - Community Food Bank	Pastor Robert Smith
Rockdale Christian Services	Pam Warren
Shepherd's Heart - Waco	Robert Gager
The Caring Place	Ginna O'Connor
Travis County Community Centers	Kirsten Siegfried
Trinity Center	Christian E. Rodriguez



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Participating in Service Insights

- 1. Collect standardized, electronic client data across network**
2. Share client data with CTFB
3. Abide by CTFB Data Privacy Requirement



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Core Data Points

Core Client Data

- First and last name*
- Zip code*
- Government benefits*
- Income*
- Phone number
- E-mail address
- Date of birth
- Gender identity
- Race/ethnicity
- Language spoken
- Total Household size*
- Number in Household:
 - Children
 - Seniors
 - Veterans
 - Active-duty military
 - College students

Household Data (not required)

- Household member names
- Household member DOB
- Household member race/ethnicity

*Required for TEFAP



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New Demographic Fields

Number Of Children (0-17) In Household


Number Of Seniors (60+) In Household

Number Of Veterans In Household

Number Of Active-Duty Military Members In Household

Number Of College Students In Household

Preferred Language

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TEFAP Data

Identification Eligibility & Income Demographics CSFP

Income Sources

Name Phone Amount Interval

+ Add Income Source

Expenses

Name Phone Amount Interval

+ Add Expense

Other Assistance Received

- Medicaid
- National School Lunch Program (NSLP) (Free Or Reduced-Price Meals)
- Supplemental Nutrition Assistance Program (SNAP)
- Supplemental Security Income (SSI)
- Temporary Assistance For Needy Families (TANF)

Household Size

----- v

Was There A Crisis Situation That Caused You To Need Food?

----- v

If Yes, Please State The Situation.

TEFAP – TEFAP

TEFAP

Supplemental Nutrition Assistance Program (SNAP)

Temporary Assistance for Needy Families (TANF)

National School Lunch Program (NSLP) (free or reduced-price meals)

Supplemental Security Income (SSI)

Medicaid

Was there a crisis situation that caused you to need food?

----- v

If yes, please state the situation.

Household is eligible based on the following *

----- v

Proxy Name (if applicable)

Proxy Address

Proxy City

Proxy ZIP

Household Size

----- v

Agent Name *

Notes

[Edit Entry Date/Time](#) — Oct 7, 2021 at 9:58 a.m.



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Electronic Signature



[CAPTURE SIGNATURES](#)



[PRINT TEFAP APPLICATION](#)

TEFAP — Signatures

By signing below, I certify that: (1) I am a member of the household living at the address provided in Section II and that, on behalf of the household, I apply for USDA Foods that are distributed through The Emergency Food Assistance Program; (2) all information provided to the agency determining my household's eligibility is, to the best of my knowledge and belief, true and correct; and (3) if applicable, the information provided by the household's proxy is, to the best of my knowledge and belief, true and correct.

Primary Applicant Signature — Grandchild Test



[Click here for digital signature](#)



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Electronic TEFAP Form

PANTRY INTAKE FORM HOUSEHOLD APPLICATION FOR USDA FOODS

Name of Household Member: Test, Grandchild
 Number of People in Household: 2 Date of Birth*: 04-04-2006
 Address: 123 Main Street City _____ Zip _____
 Phone Number*: _____

(*Participant will receive USDA Foods through TEFAP even if a participant refuses to provide their date of birth or phone number)

Name of Proxy (if applicable): _____
 Address of Proxy: _____ City _____ Zip None

This person is designated to pick up food on behalf of the eligible household. The proxy must show ID every time they pick up on behalf of the eligible household.

If the household receives other assistance, mark the appropriate choice(s) below and skip the "Total Household Income" and crisis situation sections.

Supplemental Nutrition Assistance Program (SNAP) Supplemental Security Income (SSI)
 Temporary Assistance for Needy Families (TANF) Medicaid
 National School Lunch Program (NSLP) (free or reduced-price meals)

Total Household Income: \$ 66 per Month

The Emergency Food Assistance Program (TEFAP) Income Eligibility Guidelines July 1, 2021 – June 30, 2022

Based on 185% of Federal Poverty Guidelines					
Household Size	Annual Income	Monthly Income	Twice-Monthly Income	Bi-Weekly Income	Weekly Income
1	\$23,828	\$1,986	\$993	\$917	\$459
2	\$32,227	\$2,686	\$1,343	\$1,240	\$620
3	\$40,626	\$3,386	\$1,693	\$1,563	\$782
4	\$49,025	\$4,086	\$2,043	\$1,886	\$943
5	\$57,424	\$4,786	\$2,393	\$2,209	\$1,105
6	\$65,823	\$5,486	\$2,743	\$2,532	\$1,266
For each additional household member, add:	+\$8,399	+\$700	+\$350	+\$324	+\$162

ANSWER ONLY if your household does not receive the government assistance listed above AND your income does not fall within the USDA income guidelines above: Was there a crisis situation that caused you to need food?

Yes No If yes, please state the situation: _____

The USDA Certification period is up to twelve months. For crisis food need the certification period is up to six months. Texas Department of Agriculture can approve crisis food need for seven to twelve months.

CONTINUED ON REVERSE →



CENTRAL TEXAS FOOD BANK

PANTRY INTAKE FORM HOUSEHOLD APPLICATION FOR USDA FOODS

CONTINUED FROM REVERSE

By signing below, I certify that:

(1) I am a member of the household living at the address provided in Section II and that, on behalf of the household, I apply for USDA Foods that are distributed through The Emergency Food Assistance Program; (2) all information provided to the agency determining my household's eligibility is, to the best of my knowledge and belief, true and correct; and (3) if applicable, the information provided by the household's proxy is, to the best of my knowledge and belief, true and correct.

Signature of Household Member: _____ Date: _____

INTAKE STAFF OR VOLUNTEER ONLY:

USDA Certification Period: 09 / 09 / 21 to 09 / 09 / 22 Certifier's Signature: _____ Date: 09 / 09 / 21

Household is eligible based on the following (check appropriate option):

Receives government assistance listed above Low income Crisis food need

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA.

Persons with disabilities who require alternative means of communication for program information (e.g. Braille, large print, audiotape, American Sign Language, etc.), should contact the Agency (State or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, (AD-3027) found online at: <https://www.usda.gov/oascr/how-to-file-a-program-discrimination-complaint>, and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

(1) mail: U.S. Department of Agriculture (2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov
 Office of the Assistant Secretary for Civil Rights
 1400 Independence Avenue, SW
 Washington, D.C. 20250-9410

This institution is an equal opportunity provider.



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Revised January 2021



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Changes to Assistance Categories

Will be making some changes to make it easier for CTFB to slice/dice assistance across locations and sites. We will be reaching out individually to you if the changes affect your organization.

- **What may change:**

- Changes to how HOPE program is documented
- Adding “unit” options to specify type of assistance instead of using multiple assistance categories
- Structure of assistance category for sites with multiple locations

- **What will NOT change:**

- Any assistance category not related to tracking CTFB food distribution programming



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Participating in Service Insights

1. Collect standardized, electronic client data across network
- 2. Share client data with CTFB**
3. Abide by CTFB Data Privacy Requirement



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Data Sharing Agreement



CTFB Client Data Sharing Agreement

This agreement establishes the terms and conditions under which [agency] acquires and shares confidential client data with Central Texas Food Bank (CTFB) as part of CTFB's network.

I. PURPOSE AND DESCRIPTION OF DATA

Client data, including personal information, demographics, and socioeconomic status of the respondent and/or household members will be collected and stored in a secure, shared web-based database called Oasis Insights. The data will be used for reporting and evaluation purposes and to determine eligibility for additional programs or services as desired by the respondent. Summary results, as de-identified aggregate data, may also be used to assist with strategic planning, research, fundraising, and other marketing or communication efforts. As a result of collecting and analyzing the data, both organizations will improve service offerings and operational efficiencies.

II. PERIOD OF AGREEMENT

The period during which data will be shared shall extend from _____ to _____. The agreement to share data will be renewed by _____. Any data that has been shared may be used until either party expresses otherwise in writing.

III. INTENDED USE AND CONSTRAINTS ON USE OF DATA FOR BOTH PARTIES

This agreement represents and warrants further that, except as authorized in writing, the data covered by this agreement shall not be disclosed, released, revealed, showed, sold, rented, leased, loaned, or otherwise become available to any unauthorized person. Access to the data covered by this agreement shall be limited to the minimum number of individuals necessary to achieve the purpose stated in this agreement. Any individual with access to collect and/or use the data covered by this agreement will sign a Confidentiality Agreement to that effect.

- Addendum to PA Agreements
- Includes PA and CTFB commitment to follow secure data use and sharing practices to protect client data



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Reporting Expectations

- Continue Monthly Reports as usual through Wufoo Form
- Will transition to CTFB pulling household / client numbers directly from Oasis
- Future goal: produce network / agency dashboards with key Service Insights metrics



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Participating in Service Insights

1. Collect CTFB Core Client Data in an electronic format
2. Share client data with CTFB
- 3. Abide by CTFB Data Privacy Requirement**



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Data Privacy Documents

- User Confidentiality Agreement
 - Signed by every staff member or volunteer with Oasis Insight Login
 - CTFB will provide required confidentiality training
- Client Release of Information (ROI)



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Data Sharing & Data Privacy


1. How client data will be shared between agencies
2. How client data will be protected

Current Oasis Network Setting: Walls Up	Service Insights Network Setting: Walls Halfway
<ul style="list-style-type: none">• <i>Client data is not shared between Agencies</i>• <i>Only Site providing Assistance and CTFB can see client's data</i>• <i>Clients have to complete intake and TEFAP certification at every location</i>	<ul style="list-style-type: none">• <i>Default setting in Oasis is to allow client intake data to be visible to other locations purely to streamline intake</i>• <i>Clients can still opt out of sharing and be set to private</i>• <i>Other sites cannot report on a client they did not serve or see client's assistance history (what, when, and where)</i>




Walls up vs. Walls halfway

- Visible to:
 - My agency (walls up)
 - All agencies (walls halfway)

Visible to 



Visible to 



Add Case

Identification | Eligibility & Income | Demographics | CSFP | Helping Hands | Pilot | Foundation Communities

First Name * Middle Name Last Name * Suffix

Maiden Name Nickname

Date Of Birth (MM-DD-YYYY) - -

Head Of Household

Street Address | **Mailing Address**

Address Apt. # Address Apt. #

City State Zip TX City State Zip TX


County

[COPY FROM STREET ADDRESS](#)

Phone Numbers


Description Number - - Ext.

(ex. Home or Cell)






Identification Numbers


Description Number



Email Address

Visible to 



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Release of Information (ROI)

Identification | Eligibility & Income | Demographics | Pilot

First Name * Middle Name Last Name *

Maiden Name Nickname

Date Of Birth (MM-DD-YYYY)
 - -

Head Of Household Deceased

ROI Consent

Client Agrees To Share Their Data With Other Agencies.
 Client DOES NOT Agree To Share Their Data With Other Agencies.

New Release of Information

Date *
 - -

Cases To Include

Test Case (signing)
 Test Relationship

Once the new release of information form has been signed and verified it will be valid for a minimum of 1095 days.

TEFAP CERTIFICATION IS VALID
 Last TEFAP Recertification: Oct 21, 2021

A release of information is required to share anything other than this case name, address and phone number with other agencies.

Personal Info for Test Case

Test Case
 HEAD OF HOUSEHOLD
 100 Manger Way
 Bethlehem, TX
 SHOW ON MAP
 512-251-9838 (Home)

DOB -- Dec 25, 1900
 Case # -- C169264
 Household Size -- 4

Personal Info

Assistance

Address: 100 Manger Way, Bethlehem, TX
County: Travis
DOB: Dec 25, 1900 - 120 years old

Mailing Address: Not Provided
Maiden: Not Provided
Nickname: Not Provided
Income - Personal: \$2,400 yr (\$200 mo)

Paper signature should only be captured if consent cannot be logged in the software record.

I understand that all information gathered about me is confidential. I have had an opportunity to ask questions about Oasis Insights and to review my basic identifying information and any other information I provide for use with Oasis Insights. This release authorizes my information to be stored in Oasis Insights and shared with CTFB Partners. This release will remain in effect for three years from the date noted by my signature.

I understand the ways that my data will be used as stated above.

OR

I understand that all information gathered about me is confidential. I have had an opportunity to ask questions about Oasis Insights and to review my basic identifying information and any other information I provide for use with Oasis Insights. I hereby authorize Oasis Insights to store my information on behalf of CTFB and only share my information with CTFB.

I do not wish for my information to be shared with other CTFB Partners. I understand that I will need to complete the intake process at each location. This release will remain in effect for three years from the date noted by my signature.

I understand the ways that my data will be used as stated above.

Client Name Signature Date:

- Built into Oasis in English and Spanish
- Paper versions also available in Vietnamese, Korean, Hindi, Chinese



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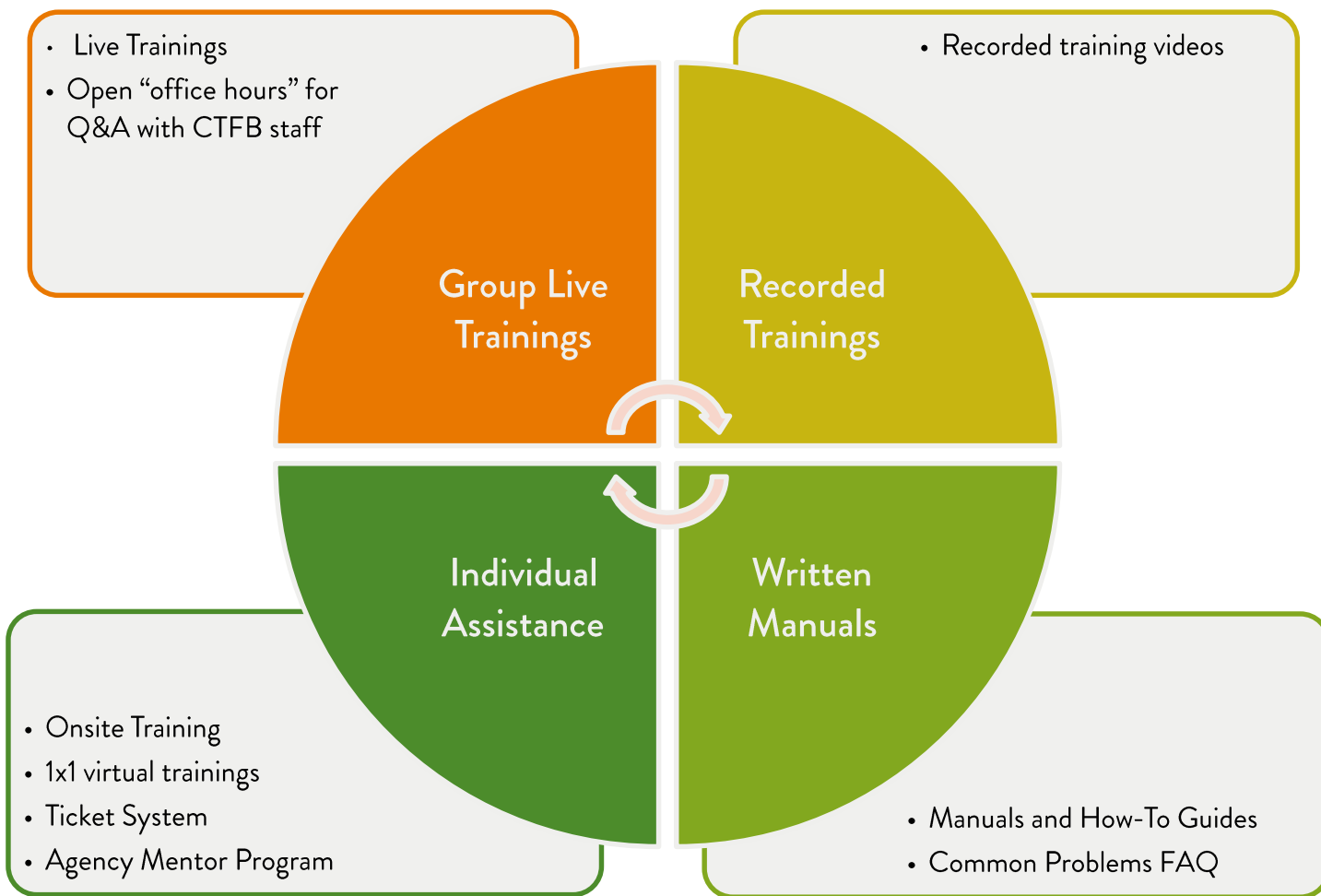
Oasis Insights – New Features

- Kiosk Mode
- Client Scheduling
- Client Broadcasting
- Barcode Scanning
- Documents



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Training & Technical Assistance Resources: Examples



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Training & Support Poll



Rank order importance of Training Topics for your organization specifically

	Low Priority	Important, but not urgent	High priority/Urgent
Basic Intake	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New Demographic Fields	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Client Consent and Release of Information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Electronic TEFAP Certification	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assistance Tracking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reporting in Oasis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Barcoding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Client Scheduling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Client Broadcasting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Are you interested in "mentoring" another Partner Agency on Oasis Insight?

No

Yes

Who is completing this poll?

Name

Role

Organization

How would you rate your organization's skill level with Oasis Insights?

Never used Oasis Insights before

Beginner

Intermediate

Advanced

Rank what type of training modality works best for your organization (with 1 being most preferred)?

	1	2	3	4	5	6
Video Tutorials (small, topical clips)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Live Webinars	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Written Training Manuals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
One-on-one Support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recorded Training Videos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mentorship from another Agency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



https://centraltexasfoodbank.iad1.qualtrics.com/jfe/form/SV_8vpHIZoBe7XOwdM

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Service Insights Contacts



Lisa Humphrey, Project Manager
lhumphrey@centraltexasfoodbank.org
Service Insights Project Manager

Tracy Ayrhart, Director of Research and Evaluation
tayrhart@centraltexasfoodbank.org
Overall Project Oversight and CTFB Data and Research Lead



Currently hiring: Service Insights Training Specialist
Role: Point of Contact for Service Insights Implementation and Oasis Training

General questions about data, research, or need Oasis Insights support?

Email research@centraltexasfoodbank.org

When in doubt, reach out to your CTFB Relationship Manager
(Kara, Karsten, Jesse, or Fabian)

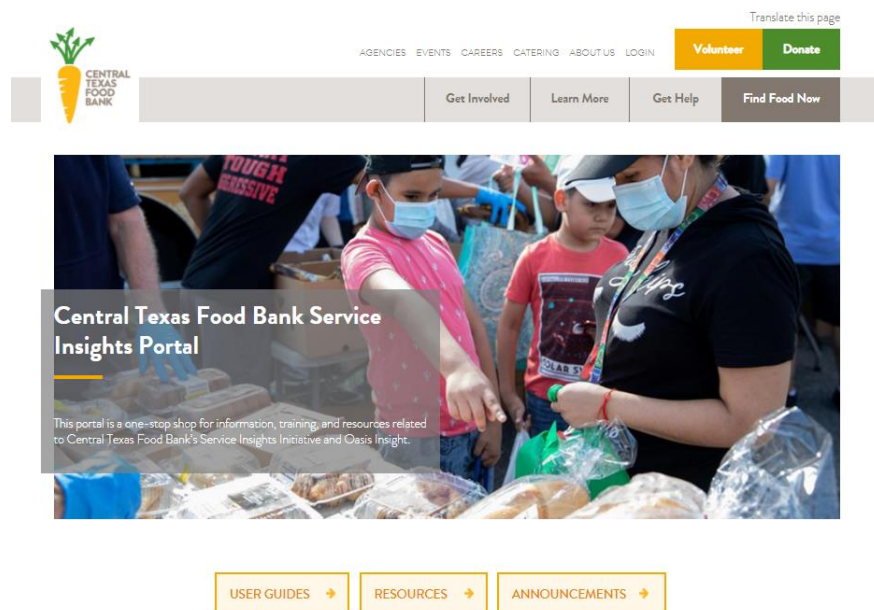
Or Email agencies@centraltexasfoodbank.org

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CTFB Service Insights Web Portal

- <https://www.centraltexasfoodbank.org/service-insights-portal>
- One-stop-shop for all resources Service Insights
 - Forms, manuals, videos, important links
 - Iterative will improve and update over time



What is the Service Insights Initiative?

The Service Insights Initiative is Central Texas Food Bank's network-wide client data tracking project. The purpose of Service Insights is to better understand the people we serve as a network by collecting standardized, electronic client data across our network partners and programs, so that we can make strategic decisions about how we provide services and measure our true impact.

Service Insights is really about three things:

1. Collecting standardized information during intake and storing that data electronically
2. Sharing information with CTFB
3. Implementing data privacy measures to ensure client information is always kept confidential and secure

Benefits to our Network include:



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Next Steps

- November 5: New Demographic Fields and Features (TEFAP, HOPE, FFFF, Client ROI) will be on for the whole network
 - Note: if you want the changes sooner, we can accommodate
- November 15: Walls halfway and Implementation starts
 - Service Insights and Data Sharing Agreement rolled out digitally
- Stayed tuned for:
 - Implementation of User Confidentiality Agreements/Training in January 2022
 - Creation of Oasis Insights User Group early 2022



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