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.
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 – 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
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.
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
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

<table>
<thead>
<tr>
<th>Organization</th>
<th>Contact Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bastrop County Emergency Food Pantry</td>
<td>Tresha Silva</td>
</tr>
<tr>
<td>Caritas of Austin</td>
<td>Cynthia Hernandez</td>
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<tr>
<td>El Buen Samaritanito</td>
<td>Amanda Doenges</td>
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<tr>
<td>Foundation Communities</td>
<td>Rita Ortega-Wiley</td>
</tr>
<tr>
<td>Giddings Food Pantry</td>
<td>Gene Parker</td>
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<tr>
<td>Hill Country Community Ministries</td>
<td>Tiesa Hollaway</td>
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<tr>
<td>Hutto Resource Center</td>
<td>Donna Jones</td>
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<tr>
<td>Shepherd’s Heart - Waco</td>
<td>Bob Gager</td>
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</tbody>
</table>

### Network Advisory Council

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

## Household Data (not required)
- Household member names
- Household member DOB
- Household member race/ethnicity

## Total Household size*
- Number in Household:
  - Children
  - Seniors
  - Veterans
  - Active-duty military
  - College students

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*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

Income Sources
- Name
- Phone
- Amount
- Interval

Expenses
- Name
- Phone
- Amount
- Interval

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

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

If Yes, Please State The Situation.

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Electronic Signature

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

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**PANTRY INTAKE FORM**

**HOUSEHOLD APPLICATION FOR USDA FOODS**

Name of Household Member: [Test, Grandchild]
Number of People in Household: 2
Date of Birth: 06-04-2006
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: 

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)
- Temporary Assistance for Needy Families (TANF)
- Medicaid
- National School Lunch Program (NSLP) (free or reduced-price meals)

Total Household Income: $66 per month

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**CONTINUED FROM REVERSE**

By signing below, I certify that:

1. I am a member of the household living at the address provided in Section III 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: 

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**INTAKE STAFF OR VOLUNTEER ONLY:**

USDA Certification Period: 09-09-21
Certifier's Signature: 
Date: 09-09-21

Household is eligible based on the following (check appropriate option):
- Low income
- Crisis food

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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 apply 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.ascr.usda.gov/complaints, 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 complaint form or letter to USDA by:

- U.S. Department of Agriculture (AD: 202-690-3442)
- Office of 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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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
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
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.

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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
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
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)
Data Sharing & Data Privacy

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

<table>
<thead>
<tr>
<th>Current Oasis Network Setting: Walls Up</th>
<th>Service Insights Network Setting: Walls Halfway</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Client data is not shared between Agencies</td>
<td>• Default setting in Oasis is to allow client intake data to be visible to other locations purely to streamline intake</td>
</tr>
<tr>
<td>• Only Site providing Assistance and CTFB can see client’s data</td>
<td>• Clients can still opt out of sharing and be set to private</td>
</tr>
<tr>
<td>• Clients have to complete intake and TEFAP certification at every location</td>
<td>• Other sites cannot report on a client they did not serve or see client’s assistance history (what, when, and where)</td>
</tr>
</tbody>
</table>
Walls up vs. Walls halfway

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

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• Built into Oasis in English and Spanish

• Paper versions also available in Vietnamese, Korean, Hindi, Chinese
Oasis Insights – New Features

• Kiosk Mode
• Client Scheduling
• Client Broadcasting
• Barcode Scanning
• Documents
Training & Technical Assistance Resources: Examples

- Live Trainings
  - Open “office hours” for Q&A with CTFB staff

- Recorded training videos

Group Live Trainings

- Recorded Trainings

Individual Assistance

- Onsite Training
  - 1x1 virtual trainings
  - Ticket System
  - Agency Mentor Program

- Manuals and How-To Guides
  - Common Problems FAQ

Written Manuals

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# Training & Support Poll

**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 order importance of Training Topics for your organization specifically**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Low Priority</th>
<th>Important, but not urgent</th>
<th>High priority/urgent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Intake</td>
<td>☐</td>
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<tr>
<td>New Demographic Fields</td>
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<tr>
<td>Client Consent and Release of Information</td>
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<td>Electronic TEAP Certification</td>
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<tr>
<td>Assistance Tracking</td>
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<tr>
<td>Reporting in Oasis</td>
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<tr>
<td>Remodeling</td>
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<tr>
<td>Client Scheduling</td>
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<tr>
<td>Client Broadcasting</td>
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**Are you interested in “mentoring” another Partner Agency on Oasis Insight?**

- No
- Yes

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

<table>
<thead>
<tr>
<th>Training Modality</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Video Tutorials (small, topical clips)</td>
<td>☐</td>
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<tr>
<td>Live Webinars</td>
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<tr>
<td>Written Training Manuals</td>
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<tr>
<td>One-on-one Support</td>
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<td>Recorded Training Videos</td>
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<tr>
<td>Mentorship from another Agency</td>
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[https://centraltexasfoodbank.iad1.qualtrics.com/jfe/form/SV_8vpHiZoBe7XOwdM](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](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 scoring that data electronically
2. Sharing information with CTFB
3. Ensuring 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