



Santa Clara County  Office of Education

# Tracy Son, Alisa Luong, Sabrina Mitome The Intake Process

Champions for Leadership  
June 3, 2014

# Head Start Overview

- Federally funded program
- Free preschool for low income families
- Family support services include:
  - health
  - nutrition
  - social
  - other
- Kindergarten Readiness

# What do we want to accomplish?

- ❖ Improve the intake process
- ❖ Foster Family Advocate's autonomy and growth
- ❖ Conduct quality intakes in a timely and efficiently manner.

# What is intake?

Formal meetings with the families to:

- Explain Head Start program
- Collect and update family information
- Assess and support with services/referrals
- Begin file documentation



# The Intake Tools

1. Parent Intake Folders w/forms
2. Binders with tab inserts and sections
3. Resource Directories
4. Class list
5. Blank appointment schedules
6. Summary Sheets
7. School calendars
8. Office supplies

# Intake Preparation

- Create binders
- Reviewing each child's file
- phones contact include discussion:
  - Health, nutrition, allergies
  - Physical/dental
  - Family needs/goals
- Schedule and send appointment letters

# **Intake Appointment**

**Meet family and conduct an hour intake:**

- 1. Review file for missing required information**
- 2. Refer and establish health/nutrition plan**
- 3. Discuss parent involvement opportunities**
- 4. Goal setting:**
  - **Assess needs/interest**
    - **Provide services/referrals**
    - **Write Family Partnership Agreements**

# Project goal 1

**Make changes to and standardize the forms, so they do not need to be updated annually.**

- Form Task Force revise forms every 2 years
- Revise only as needed
- Intake forms on shared network drive





# Project goal 2

**To allow for Intake planning and preparation, by June 1:**

- Establish Intake start week
- Provide school calendars
- Announce Family Advocate site assignments

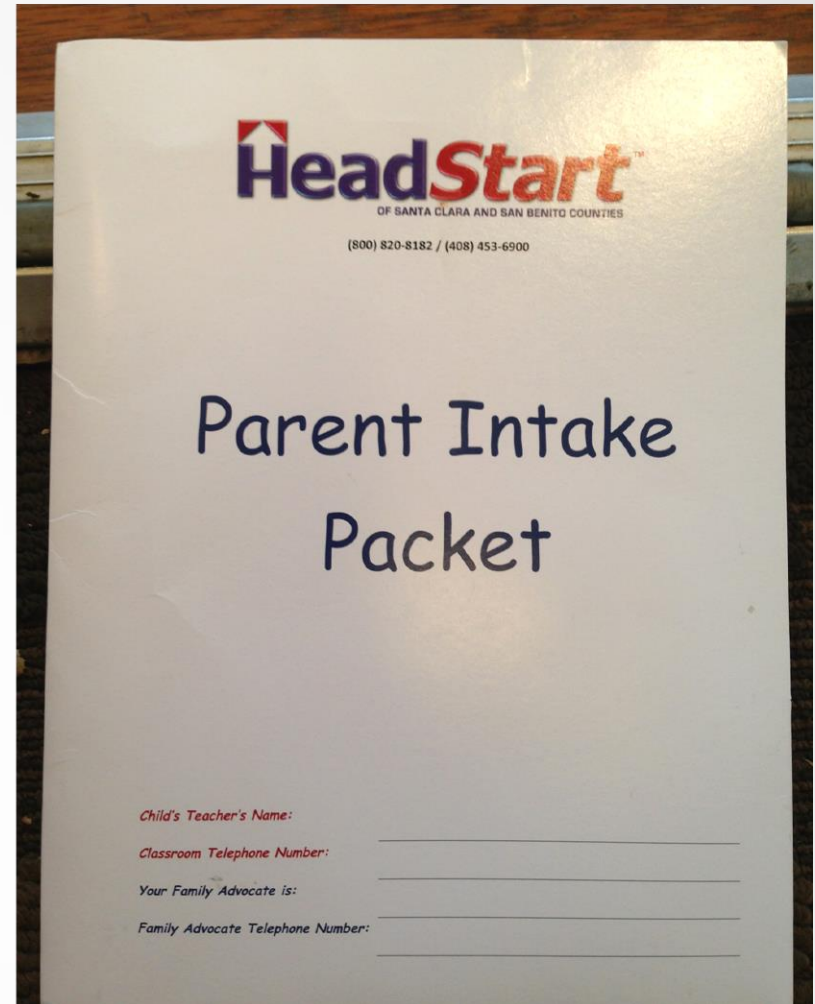


# Project goal 3

## Intake process readiness

Ensure delivery to sites, in sufficient quantity, by June 1 of:

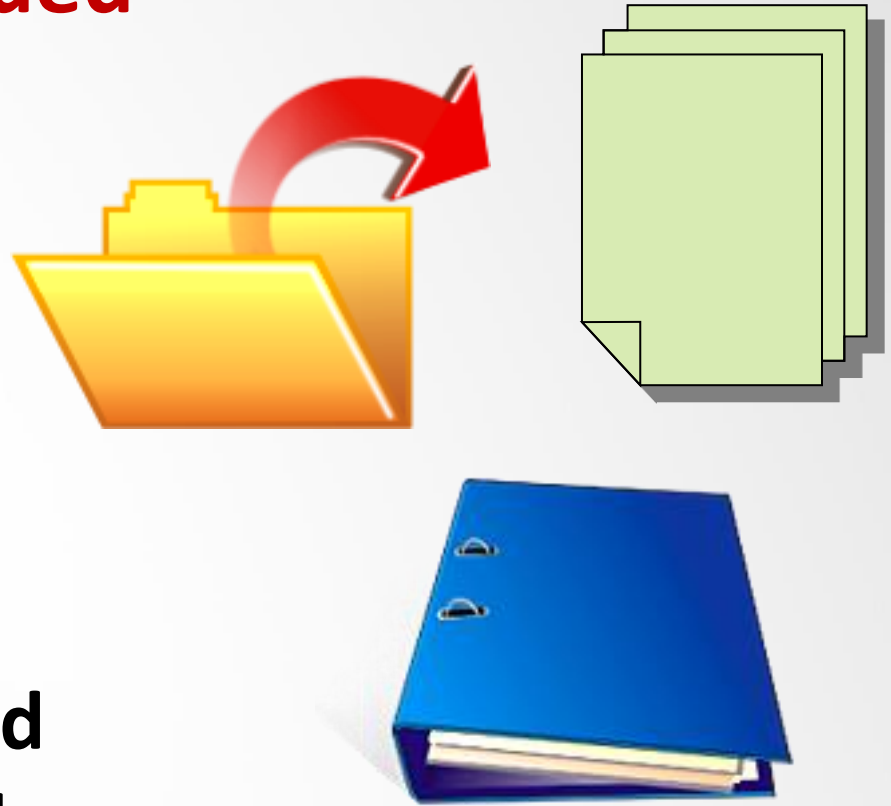
1. Office and Intake supplies
2. Resource Directories (all 3 languages)
3. Parent Intake Packet folders by language, with all forms assembled



## Project goal 3 continued

- ❖ Binders
- ❖ Tab inserts
- ❖ Children's binder sections

**are assembled, collated  
and delivered to sites by  
June 1.**



## Project goal 3 continued

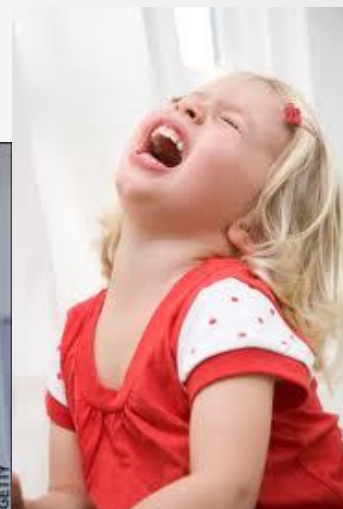
### Resolve end of school year issues for smooth transition.

- PIR reports sent to Family Advocates (FAs) 1 week before last day of school
- FAs correct and enter PIR
- Allow 3 days for putting away graduation files

# Project goal 4

## Vision and hearing screenings after intake

- Review PE and IEP first to avoid duplication
- Parents remind health clinics to screen children.
- Focus First will screen children during first week of school.
- 1 hour is too long for children to wait.



# Project goal 5

## Intake Individual or Group

- ❖ **Participation in Intake groups optional**
- ❖ **FAs will have the option to work as individual or in group**
  - Assign a back up for language/translation and emergencies
  - Provide job training & simple guide sheet as needed
  - Mentoring for new staff or those who request it



# Individual

- Advantages
  - Builds relationship with families
  - Familiar with status of all files
  - Knows what items need follow-up
  - Site FA familiar with nearest resources
  - Fosters independence
- Disadvantages
  - No coverage if FA is out

# Group of 2

- Advantages

- Shared expertise
- Coverage in case one FA is out

- Disadvantages

- Requires more coordination, planning, and communication.
- Requires files to be reviewed
- Other FA not familiar with nearest resources



# Group of 4

- Advantages
  - Shared expertise
  - Coverage in case one FA is out
- Disadvantages
  - Requires more coordination, planning, and communication.
  - Requires files to be reviewed
  - Scheduling more than 2 Intake appointments at same time:
    - Crowded, not enough rooms
    - Impacts privacy
  - Insufficient computers for all FAs
  - Other FA not familiar with nearest resources
  - New calendar has insufficient time to complete all Intakes

# Individual Example

## 1 family per hour daily schedule

8:30-9:30

9:30-10:30

break

10:50-11:50

Lunch

1:00-2:00

2:00-3:00

break

3:20-4:20

4:20-5:00 reschedule/confirm appts.

**6 Intake appointments per day for  
66 families will take 11 Intake days**

**Intake Preparation:** Complete binders, review HH, Contact & schedule Intake appointments:  
3 days for binders  
+ 2 days for scheduling  
5 days for preparation

5 Preparation days  
+ 11 Intake days

**16 days to complete Intake**

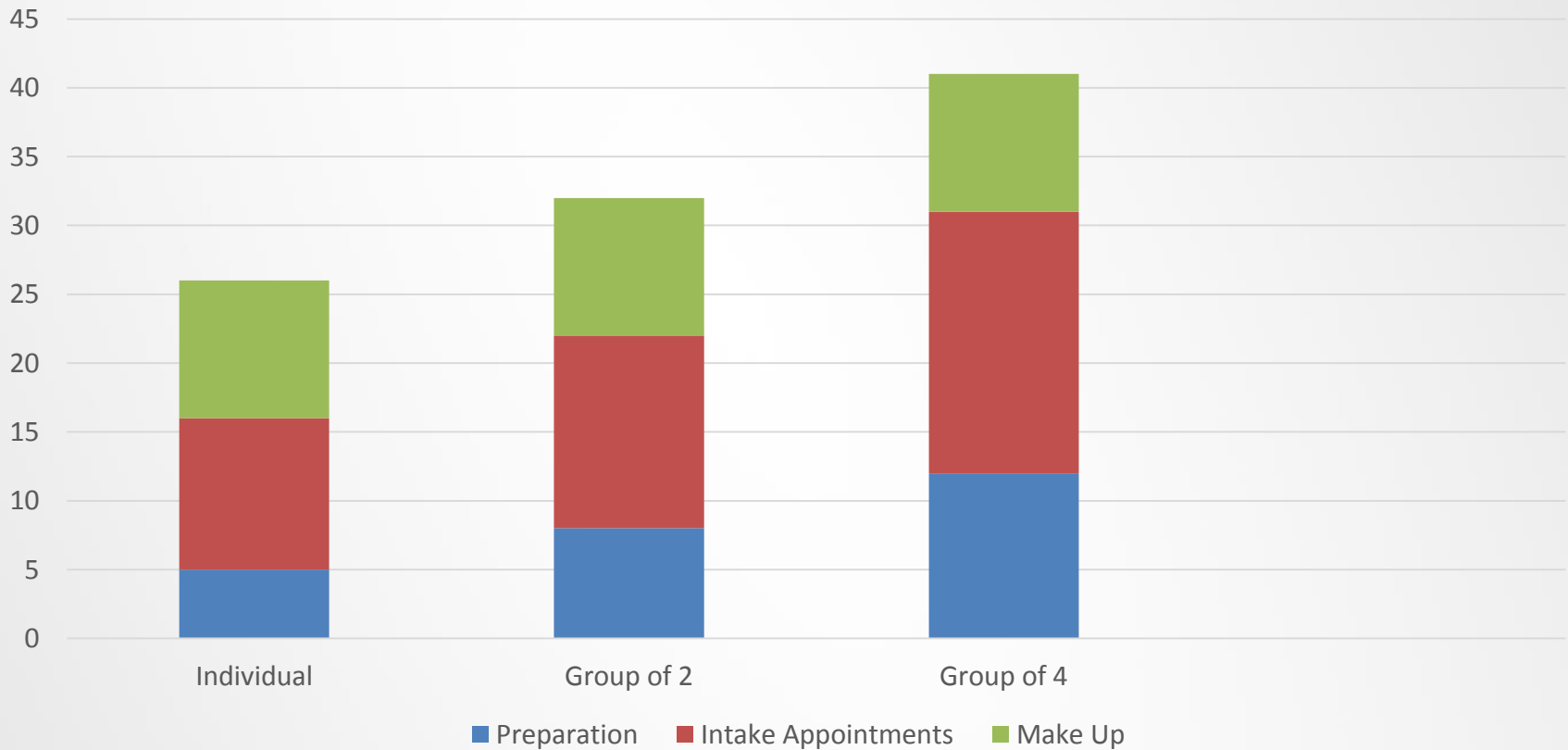
1-2 weeks for make ups/new students/Follow ups/recruitment/FA training/FD coverage/Drop-In

<b>Individual</b>	<b>Group of 2 FAs</b>	<b>Group of 4 FAs</b>
<b>66 families</b>	<b>66 families x 2 = 132 families</b>	<b>66 families x 4 = 264 families</b>
<b>Intake Preparation: 5 days</b>	<b>Intake Preparation: 8 days</b>	<b>Intake Preparation: 12 days</b>
<b>66 families / 6 intakes = 11 days</b>	<b>132 families / 10 intakes = 14 days</b>	<b>264 families / 14 intakes = 19 days</b>
<b>Daily Schedule - 1 family per hour</b> 8:30-9:30 9:30-10:30 Break 10:50-11:50 Lunch 1:00-2:00 2:00-3:00 break 3:20-4:20 4:20-5:00 reschedule/remind next appt	<b>Daily Schedule – 1-2 family per hour</b> 8:30-9:30 9:30-10:30 Break 10:50-11:50 Lunch 1:00-2:00 2:00-3:00 break 3:20-4:20 4:20-5:00 reschedule/remind next appt	<b>Daily Schedule - 2 family per hour</b> 8:30-9:30 9:30-10:30 Break 10:50-11:50 Lunch 1:00-2:00 2:00-3:00 break 3:20-4:20 4:20-5:00 reschedule/remind next appt
<b>16 days</b>	<b>22 days</b>	<b>31 days</b>
1-2 weeks make up/new children/FD coverage/ Recruitment/Follow ups/ FA Training/drop-in	1-2 weeks make up/new children/FD coverage/ Recruitment/Follow ups/ FA Training/drop-in	1-2 weeks make up/new children/FD coverage/ Recruitment/Follow ups/ FA Training/drop-in
<b>Total: 21-26 days</b>	<b>Total: 27-32 days</b>	<b>Total: 36-41 days</b>
<b>Begin June 16 complete by July 22</b>	<b>Begin June 16 complete by July 30</b>	<b>Begin June 16 complete by August 12</b>



# Comparison

## Days to Complete Intake



# Accomplishments/Successes

- Alleviate problems that delay Intake Process
- Choice of individual or groups to complete Intake
- Reduce stress
- Allow for better planning and preparation
- Save time on follow-ups

# Sabrina Mitome

## Professional Development Goals

- Personnel management skills
- Ability to “read” customers

## Key Learnings

- Embrace personality types and leadership styles
- Take risks, explore options, to succeed

# Alisa Luong

## Professional Development Goals

- Implement the skills learned for career advancement

## Key Learnings

- Collaboration
- Effective communication

# Tracy Son

## Professional Development Goals

- Opportunities to share information and Knowledge
- Communicate effectively

## Key Learnings

- Commitment
- Take the initiative



# Thank You

## Head Start Program

### Supervisors

Martha Munoz

Pam Dejesus

### Family Advocates

ALL

## Champions for Leadership

Kathy Sealana

### Mentors

Judy Kershaw

Lisa Ketchum

Craig Wilde

