



Client Intake Procedures

Overview

The following is a compilation of feedback and input from members who have developed a system of client intake systems and procedures.

Depending on the community, the philosophy of the food bank and factors such as the availability of food versus demand will result in unique situations from food bank to food bank. There is no universally correct method since systems are based on a number of factors, however we appreciate being able to share this summary of what our members reported.

Eligibility Guidelines for Clients Options

Often the service guidelines will include:

- **Geographical limits:** Restricting service to people within your town, neighbourhood, or postal code.
 - **Proof of address:** government ID or utility bill, often photocopies are acceptable. Be mindful that requiring a photo ID, a utility bill, or proof of citizenship may mean that some of the people with the highest need will not qualify for your services. Consider how you will respond to someone without a permanent fixed address, who cannot afford an ID and has no bills in their name, or who may be an undocumented immigrant.
 - **Time at address:** clients may be required to show proof of residency for a particular time period, such as 3 months.
 - **New clients:** may often receive service without any requirements so that they are assisted while they find or gather the required information.
 - **Referrals:** keeping contact information for neighbouring food banks, soup kitchens, meal agencies, etc., for referral to anyone ineligible for your services.

Eligibility Guidelines for Clients Options cont'd...

- **Source of income:**
 - **Proof of Income:** such as cheque stub, salary slip, EI receipt, bank print-out, etc., and may also request a list of substantiated expenses.
 - **Source of Income only:** source of income required, but not how much.
 - **No income info required:** depending on a number of factors such as community support, philosophy, demand vs resources, this may not be required.
- **Proof of dependants:** *Some proof showing the number of family members is usually required.*
 - **One registration per family** or individual is generally permitted.
 - **Care Card, Birth Certificates, or Immigration papers:** Occasionally a CareCard may be in the possession of the non-custodial parent so a birth certificate is required instead.
- **Frequency of Service:** *When and how and how often are clients able to access the services?*
 - Depending on demand, frequency may vary from daily to weekly, to monthly.
 - To accommodate working clients, students, etc., many food banks have a weekend or evening option.
 - For food banks that are open only once monthly or bi-weekly, an emergency hamper will be sometimes be available so that clients who miss a distribution day will still be able to access services rather than waiting an additional month.
- **Information Updating:** Depending on the availability of staff and volunteers, the information gathered may be updated at every single visit, every 6 months, or once per year.

Client Intake Methods

This is a typical procedural sample list of how some of our food banks might welcome clients to their distribution:

1. Welcome each client individually. Introduce yourself and any other volunteers in the room, and ask for the client's name.
2. Offer a place to sit if you cannot register them right away. Provide distractions for children, such as toys and books.

Client Intake Methods cont'd...

3. Ask the client to join you in a more private area of the room or in a separate room to gather information and determine their eligibility for your services.
 - a. If you go to a private room, you should try to sit the client closest to the exit to allow a greater sense of safety. It is good practice to ask if the client would like the door to be opened or closed, and respect their wishes.
 - b. Give the client the nicer and more comfortable looking chair, and try not to sit directly opposite to them.
4. Collect any necessary information, and explain where it will be stored, who will have access to it, and why it is being collected.
5. Explain all relevant policies and procedures, including hours of operation and limits to services. Ask the client to sign an agreement to services. This can be as simple as signing the intake sheet saying, "I agree to respect the services of the food bank and other clients."
6. Offer referrals to other community organizations when appropriate, and then thank the client for their time and guide them to the next stage where they will pick up their food.
7. We make a point of reminding them that we are volunteers and that we are not trained professionals.

(For client code of conduct samples, please see the member resource area of our website.)

Record Keeping / Privacy Policies

The following is any example of a members' client privacy policy:

Policy

In order to operate and deliver services, the XXXX Food Bank needs to collect certain personal information on clients, employees, volunteers and donors. XXXX Food Bank respects and upholds an individual's right to privacy and to protection of his or her personal information. We are committed to ensuring compliance with applicable privacy legislation.

Definition

Personal information is defined as "information about an identifiable individual," and is not restricted to recorded information. It includes any factual or subjective information, in any form, about an "identifiable individual." Personal information does not include "contact information, defined as information enabling an individual to be contacted at his or her place of business including position, name or title, business telephone number, business address, business e-mail or fax number.

Record Keeping / Privacy Policies cont'd...

Implementation

The following principles will govern the collection, use and disclosure of personal information.

Accountability

XXXX Food Bank is accountable for the personal information collected of client, employee, volunteer and donor.

XXXX has been appointed as privacy officer and is responsible to advise the Executive Director on the agency's compliance with this policy.

Purposes for Collection, Use and Disclosure

XXXX Food Bank collects and uses information for the delivery of service, determining eligibility, statistical purposes, compliance with legislative and contractual requirements, employment purposes, issuing tax receipts and to keep donors informed.

Disclosure of Information to Third Parties

The only circumstances under which personal information may be disclosed to third parties is for the fulfillment of any purposes identified above or as required by law.

If personal information is disclosed to third parties for the fulfilment of any purpose as identified above, the agency will ensure that consent and appropriate security undertakings, such as confidentiality clauses in contractual agreements are employed to protect the transfer and use of personal information.

XXXX Food Bank does not sell, trade or rent information to third parties.

Limiting Collection

We collect only personal information required for the purposes identified above.

Limited Use, Disclosure, and Retention

XXXX Food Bank does not use or disclose personal information for any purpose other than those for which it was collected, except with consent or as required by law.

Personal information is retained only as long as is necessary for the fulfilment of the purposes for which it was collected, or as required by law.

Accuracy

XXXX Food Bank will make all reasonable efforts to ensure that personal information is as accurate, complete, and current as required for the purposes for which it was collected.

Safeguard

XXXX Food Bank protects information with appropriate security safeguards.

In the event that there is an involuntary breach of security (e.g. theft, loss, electronic breach), the agency will immediately inform client and all impacted parties of the loss.

Furthermore, the agency will provide necessary support, debriefing and safety planning for the impacted individual. The agency's privacy officer will be notified and all of these incidents will be reviewed.

Access

Individuals have the right to access their personal information under the control of the agency, except in certain exceptional situations. The Privacy Officer will assist with any access request.

Further Information

The following link provides information from the Privacy Commissioner of Canada where you will find further information to safeguard the privacy of clients:

https://www.priv.gc.ca/information/pub/guide_org_e.asp