**Checklist Strategies to Maximize Participation in FRP Applications or Alternative Income Forms**

**Building the Form** i

* Consider changing the title of the form. We recommend “Education Benefit Form” or “Household Income Form.”
  + We do not recommend using the word “survey” in the title, as districts report that families view the forms as optional when named survey.
  + Many, but not all, states allow districts to rename the form. Check with your state agency.
* Include a clear, easy-to-understand statement about confidentiality on the form.
* Provide the form in all languages that families in your community speak.
* Put the form online and share via email, text, and QR code on print materials.
* Simplify the form by using checkboxes with income ranges, as opposed to having family members write their incomes.
* Ask every single family to complete a form, but add a “Decline to Respond” checkbox to the top of the form (these forms cannot legally be required).
* Bundle the form in the back-to-school packet of paperwork that families are required to complete.
* Provide an FAQ document with answers to commonly asked questions alongside the form.

**Direct Outreach to Families + General Messaging** i

* Enlist front desk staff to help parents/guardians fill out the form. Train staff in providing hands-on assistance.
* Send a letter to families from superintendents/principals so that families understand the purpose of income forms, school funding. For example, “When every family completes the Education Benefit Form, our schools receive the funding we need to provide a high quality education to all students.”
* Call families directly and ask if you can fill out the form for them via phone.
  + Ensure that the staff conducting this outreach speak the languages that families speak.
* Team up with community organizations to ask for their help with outreach to families, including calling families directly to help them fill out the forms.
* Present at staff meetings to explain the importance of getting all families to complete the form and to ask for support with outreach to families.
* Utilize school events to offer hands-on assistance with the form at back-to-school nights and other events.
* Train school staff to utilize laptops to complete forms at school events.
* Amplify outreach through district administrators, principals, and teachers.
* Provide anyone who is assisting with outreach with:
  + Phone script (see example from Redlands in CA)
  + Answers to FAQs about the form
* Send multiple reminders about completing the form through multiple channels.
  + Robo-calls
  + Parent newsletters
  + Emails
  + Text messages
  + Social media
  + Mail

**Competitions/Incentives** i

* Send weekly/biweekly updates to all school principals with a chart that shows each school’s completion rate to create a friendly competition among principals for getting the most forms turned in.
* Offer an incentive to families for filling out the forms. Some districts offer a raffle with exciting prizes, and families who turn in their forms are eligible to win.
* Throw a party for the school with the highest return rates of the form.

**California- and Colorado- Specific** i

* Take advantage of CA’s option to create a “base year” for LCFF funding, and only collect income forms from families every four years.
* Take advantage of CO’s option to create a “base year” for state aid funding, and only collect income forms from families every four years.
* In between the base years, collect income forms only from families that are new to the district (e.g. new students) and from families with no completed form on record.