📝 Intake & Screening System - Participant Recruitment

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☰ Tags	

Complete intake and screening system for Legacy Rising cohorts

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Intake Philosophy

We're not gatekeeping. We're matchmaking.

Legacy Rising isn't for everyone. And that's okay.

Good fit:

- Ready to channel obsession into creation

- Tired of the old story, ready to write a new one

- Willing to show up (even when it's hard)

- Interested in entrepreneurship or building something

Not yet a fit:

- Active crisis (needs clinical support first)

- Court-mandated (has to want it, not be forced)

- Just looking for a check-in-the-box recovery credential

- Not interested in business/building

Our job: Find people at the right moment. Not everyone is ready now. That's okay.

Intake Funnel (3 Steps)

Step 1: Interest Form (2 minutes)

Purpose: Capture leads, qualify basic fit

Channel: Website, social media, partner referrals

Conversion goal: 50% → Step 2

Step 2: Phone Screen (15 minutes)

Purpose: Human connection, assess readiness, answer questions

Who does it: Facilitator or alumni

Conversion goal: 70% → Step 3

Step 3: Full Application + Intake Assessment (30 minutes)

Purpose: Finalize cohort, collect baseline data

Who reviews: Facilitator + founder (for first few cohorts)

Conversion goal: 80% accepted

Step 1: Interest Form (Website/Social)

Header: Ready to break the cycle?

Subhead: Legacy Rising helps cycle-breakers turn obsession into entrepreneurship. 8 weeks. Houston. Free.

Questions

1. First name:

[Text field]

2. Email:

[Text field]

3. Phone number:

[Text field]

4. In one sentence, what cycle are you ready to break?

[Text field]

Examples: "I'm done letting addiction run my life." "I'm tired of dead-end jobs." "I want to build something that matters."

5. Have you thought about starting a business or project?

- Yes, I have a specific idea

- Yes, but I don't know what yet

- Not really, but I'm curious

- No

6. How did you hear about Legacy Rising?

- Friend/family

- Social media

- Recovery program

- Reentry program

- Google search

- Other: [blank]

7. Are you currently in Houston or able to attend in-person sessions?

- Yes, I'm in Houston

- Yes, I can get to Houston

- No, but I'm interested in virtual options

- Not sure yet

Submit button: I'm ready to build

Confirmation message:

"Thanks, [Name]. We'll call you within 48 hours to talk about next steps.

In the meantime, check out [alumni story video link] to see what's possible.

You're not broken. You're a builder.

- Ashley"

Step 2: Phone Screen Script (15 minutes)

Goal: Build trust, assess readiness, answer questions, schedule full application

Opening (2 minutes)

"Hey [Name], this is [Your Name] from Legacy Rising. You filled out the interest form—thanks for that. I'm calling to learn more about you and answer any questions. Sound good?"

[If yes, continue. If no, ask when's a better time.]

"First off, this isn't an interrogation. I'm here to see if Legacy Rising is a good fit for you AND if you're a good fit for us. Fair?"

Questions (10 minutes)

1. Tell me about the cycle you're ready to break.

Listen for:

- Specificity (vague = may not be ready)
- Ownership ("I" language vs. blaming others)
- Motivation (tired of pain OR excited about possibility?)

2. What's going on in your life right now?

Listen for:

- Stability (housing, income, basic needs met?)
- Crisis indicators (suicidal ideation, active use, legal emergency)
- Support system (isolated or connected?)

Red flags that require referral before program:

- Active suicidal ideation → Crisis line, emergency services
- Acute withdrawal/detox needed → Medical support
- Homelessness without plan → Housing first

3. Why entrepreneurship? Why now?

Listen for:

- Intrinsic motivation ("I want to build/create/solve") = good

- Extrinsic only ("I need money") = may need reframing

- Desperation ("I'll try anything") = may not be right fit

4. What do you know about Legacy Rising so far?

If they don't know much, brief pitch:

"Legacy Rising is an 8-week program that helps people like you turn obsessive energy into entrepreneurship. We don't treat obsession as a problem—we channel it. You'll build a business idea, learn the skills, and join a network of builders who get it.

It's not therapy. It's not traditional recovery. It's a launchpad.

Free. Houston. In-person. Starting [date]."

5. Can you commit to showing up weekly for 8 weeks?

Discuss:

- Schedule (which day/time works?)

- Transportation (do they have reliable transport?)

- Competing obligations (job, family, treatment—can they balance?)

Closing (3 minutes)

If good fit:

"Okay, I think you'd be a great fit. Next step is the full application—it takes about 30 minutes and includes some assessments so we can personalize the program for you. I'm going to send you the link. Can you complete it by [date]?

[Send link via text immediately]

Any questions before we hang up?

Alright, [Name]. I'm excited to see what you build. Talk soon."

If not yet ready (but could be later):

"[Name], I really appreciate you reaching out. I think Legacy Rising could be a great fit for you—but not quite yet. Here's why: [specific reason, e.g., active crisis, housing instability, no interest in entrepreneurship].

What I'd recommend is [specific referral or action step]. Then circle back to us in [timeframe]. Does that make sense?

[Give them a direct contact for later: email or phone]

You're not rejected. You're just not at the right moment yet. And that's okay."

If clear no:

"[Name], thanks for your interest. Based on what you've shared, I don't think Legacy Rising is the right fit right now. [Brief reason]. But I don't want to leave you hanging—here are some resources that might help: [list 2-3 alternatives].

Good luck. You've got this."

Step 3: Full Application Form (30 minutes)

Header: Let's build your future.

Subhead: This application helps us understand you better so we can support your journey. Be honest—there are no wrong answers.

Section 1: About You

1. Full name:

[Text]

2. Preferred name (if different):

[Text]

3. Pronouns:

[Text]

4. Date of birth:

[Date]

5. Email:

[Text]

6. Phone:

[Text]

7. Current address:

[Text]

8. How stable is your housing situation right now?

- Very stable (own/lease, no risk of losing it)

- Mostly stable (month-to-month, staying with family)

- Unstable (could lose housing soon)

- Currently unhoused

9. Emergency contact (name + phone):

[Text]

Section 2: Your Story (Open-Ended)

10. Tell us about the cycle you're breaking. What's your story?

[Large text box, 250-500 words]

Prompt: We want to understand where you've been and where you're going. What patterns are you leaving behind? What are you building toward? Be real.

11. What's your relationship with substances, addiction, or compulsive behaviors?

[Large text box]

Prompt: We're not here to judge. We just need to know where you're at so we can support you. Are you in recovery? How long? Struggling? Using harm reduction? Be honest.

12. Have you been incarcerated or involved in the justice system?

- Yes, currently (parole/probation)

- Yes, in the past

- No

- Prefer not to say

If yes: Does participation in Legacy Rising conflict with any legal requirements or restrictions?

[Text]

Section 3: Entrepreneurship & Motivation

13. Do you have a business idea? (If yes, describe it. If no, that's okay—tell us what problems you care about.)

[Text box]

14. Why entrepreneurship? Why not just get a job?

[Text box]

Prompt: What draws you to building something of your own?

15. What skills, experiences, or passions do you bring to the table?

[Text box]

Prompt: You have more to offer than you think. What are you good at? What have your struggles taught you?

16. On a scale of 1-10, how ready are you to start building a business?

[Slider: 1 = "Just curious" to 10 = "I'm all in"]

Section 4: Support & Barriers

17. What support do you have right now? (Check all that apply)

- Family or friends who believe in me
- Recovery community or sponsor
- Therapist or counselor
- Mentor or advisor
- Financial support (even if small)
- Transportation
- Childcare

- Other: [blank]

- None of the above / I'm figuring it out alone

18. What barriers or challenges might make it hard for you to complete the program?

[Text]

Examples: Work schedule, transportation, childcare, mental health, etc. We want to problem-solve with you.

19. Are you currently receiving any of these services? (Check all that apply)

- Mental health treatment

- Substance use treatment

- Parole/probation supervision

- Workforce development program

- Other: [blank]

Section 5: Commitment

20. Legacy Rising is 8 weeks, [day of week], [time], in [location]. Can you commit to attending weekly?

- Yes, I can make it work

- Probably, but I might miss 1-2 sessions

- Maybe—I have some scheduling conflicts

- No, I can't commit to that schedule

21. What are you hoping to get out of Legacy Rising?

[Text]

22. What will success look like for you 6 months from now?

[Text]

Section 6: Assessments (Pre-Program Baseline)

Instructions: The following assessments help us understand where you're starting so we can track your growth. Answer honestly—this is just for us and you.

23. Builder Identity Scale (20 items)

[Full scale from assessment page]

24. Obsession Redirect Inventory (24 items)

[Full scale from assessment page]

25. Recovery Capital Index (40 items)

[Full scale from assessment page]

26. Grit Scale (8 items)

[Standard Grit Scale]

27. Passion Scale (12 items)

[Vallerand Passion Scale—if licensed]

Section 7: Final Questions

28. Is there anything else you want us to know?

[Text]

29. How did you hear about us?

- Friend or family member
- Social media (which platform?)
- Recovery program (which one?)
- Reentry program (which one?)
- Google search
- Flyer or poster
- Other: [blank]

30. Can we contact you for follow-up (3, 6, 12 months after the program) to see how you're doing?

- Yes

- No

Submit button: I'm ready to build

Confirmation page:

"Application submitted. We'll review it within 5 days and let you know next steps.

In the meantime, start thinking: What's one problem you're pissed off enough to solve?

That's where we'll begin.

- Legacy Rising Team"

Application Review Rubric (For Facilitator/Founder)

Score each dimension 1-5. Minimum 12/20 to accept.

Dimension	1 (Red flag)	3 (Neutral)	5 (Strong fit)
Readiness	Active crisis	Stable but uncertain	Stable and motivated
Motivation	Extrinsic only (money)	Mixed	Intrinsic (build, create, solve)
Insight	Blames others	Some self-awareness	High self-awareness
Commitment	Can't attend regularly	Will try	All in
Fit	No interest in entrepreneurship	Curious	Clear idea or passion

Total score: _ / 25

Decision:

- 20-25: Strong yes → Accept immediately

- 15-19: Probably yes → Accept with support plan

- 10-14: Maybe → Call for additional conversation
- <10: Not now → Refer elsewhere, invite to reapply later

Acceptance Email Template

Subject: You're in. Let's build.

Hey [Name],

Welcome to Legacy Rising.

Your application stood out. Your story matters. And I'm excited to see what you build.

Here's what happens next:

1. Orientation (optional but recommended)

[Date/time/location]

Meet your cohort, tour the space, ask questions.

2. Week 1: Reframing Obsession

[Date/time/location]

We start here: What if your obsessive mind is a gift?

3. What to bring:

- Yourself (that's it)
- Workbook provided
- Pen and open mind

4. Questions?

Reply to this email or call/text [phone].

One more thing:

You're not a cycle-repeater.

You're a cycle-breaker.

Prove it.

- Ashley

P.S. Mark your calendar now. 8 weeks. Don't miss Week 1.

Waitlist Email Template (When Cohort is Full)

Subject: Waitlist for [Cohort name/date]

Hey [Name],

Thanks for applying to Legacy Rising. You're a strong fit—but our [cohort name] is full.

You're on the waitlist. If someone drops, you're in.

If not, we'll prioritize you for the next cohort starting [date].

In the meantime:

- Follow us: [social links]

- Watch this: [alumni story video]

- Start thinking: What problem do you want to solve?

You're close. Stay ready.

- Legacy Rising Team

Referral Email Template (Not Ready Yet)

Subject: Not yet—but here are next steps

Hey [Name],

Thanks for applying to Legacy Rising.

Based on your application, I don't think we're the right fit for you *right now*. Here's why:

[Specific reason: active crisis, housing instability, scheduling conflict, etc.]

But I don't want to leave you hanging. Here are some resources that might help:

- [Resource 1]

- [Resource 2]
- [Resource 3]

Once you [specific action, e.g., secure stable housing, complete detox, etc.], reapply.

We'll be here.

- [Name], Legacy Rising

Data Management & Privacy

Storage: Secure CRM (Airtable, Salesforce, or Qualtrics)

Privacy:

- Applications encrypted
- Access limited to facilitator + founder
- No sharing with third parties without consent
- Participants can request their data anytime

Retention:

- Accepted participants: Retain indefinitely (for alumni network)
- Waitlist: Retain for 1 year
- Not accepted: Retain for 6 months (in case they reapply)

Next Steps to Launch Intake System

- [x] ~~Build interest form (Google Forms, Typeform, or website embed)~~
- [ ] Create phone screen script training for facilitators
- [ ] Build full application (Qualtrics or Typeform with logic)
- [ ] Set up CRM for applicant tracking
- [ ] Draft email templates (acceptance, waitlist, referral)
- [ ] Create referral resource list (local partners)

- [ ] Train facilitators on application review rubric
- [ ] Test full funnel with 3-5 mock applicants