

MORE WIC!

**Matching, Outreach, Referrals
for Enrollment in WIC**

Application Planning Resource

August 2024

Website: www.morewic.org

Email: morewic@jhu.edu

Table of Contents

<i>Introduction</i>	3
<i>Activity 1: Data sharing</i>	5
<i>Activity 2: Data matching</i>	7
<i>Activity 3: Planning for Outreach</i>	8
<i>Activity 4: Establishing an Advisory Council</i>	12
<i>Activity 5: Evaluation Plan for Implementation and Outcomes</i>	13

Introduction

The MORE WIC! project (Matching, Outreach, Referrals, and Enrollment for WIC!) will assist WIC State agencies, including the District of Columbia, Indian Tribal Organizations (ITO) and US Territories (hereafter referred to collectively as State agencies), with implementing a streamlined enrollment process by using information from Medicaid, SNAP, and other assistance programs to identify, refer, and reach out to WIC-eligible non-participants. MORE WIC! will support individual State agencies for up to 30 months in the development of data sharing agreements (DSAs), data matching processes, and referral and outreach efforts through funding, technical assistance (TA), and evaluation support.

The purpose of this document is to provide information to help you apply for a [MORE WIC! subgrant](#). As State agencies have different experience with data matching, which may include referrals when required by partner programs, and outreach activities, we've also provided definitions and key information on allowable subgrant activities. This document will not answer all the questions you may have but rather guide your thinking and identify questions or concerns you have and want to raise through 1:1 TA as you develop your application.

Technical assistance (TA) will also be available to State agencies that wish to engage in data matching but do not require or request funding. To learn more about this subgrant opportunity, establish your needs, request technical assistance, or discuss an application, please reach out to morewic@jhu.edu.

MORE WIC! will support the advancement of State agencies across the spectrum of experience through individualized TA and peer learning opportunities. We anticipate three categories of State agencies participating in MORE WIC! as shown in Table 1.

Table 1. State agency experience with data sharing, matching and outreach.

Learner	Doer	Leader
<p>State agencies at the outset.</p> <ul style="list-style-type: none">✓ No DSAs in process✓ Limited or no prior data matching and referrals experience✓ No targeted outreach planned with Medicaid or SNAP	<p>State agencies ready to advance.</p> <ul style="list-style-type: none">✓ DSAs in process or executed✓ Some data matching and referral capabilities✓ Targeted outreach with Medicaid or SNAP planned or tested	<p>State agencies ready to expand</p> <ul style="list-style-type: none">✓ DSAs executed✓ Sophisticated data matching and referral capabilities✓ Innovative ideas for data sharing, use of technology, and/or outreach strategies

In your application to the MORE WIC! RFP, you will be asked to state whether you are a Learner, Doer, or Leader with respect to data sharing and matching. Because State agencies will have different “starting points”, each will have a unique set of objectives, implementation plans and timelines in their subgrant applications. That said, with the support of FNS and the project team, grant-funded projects should plan to tackle up to 5 key activities in their projects over a maximum 30-month period.

1. Establish or modify a DSA or similar memorandum of understanding/agreement (MOU/MOA) with your State SNAP and/or Medicaid office and other programs (if not already in place)
2. Create the process and procedures for repeated referral data matching to identify those enrolled in Medicaid and/or SNAP and other programs, but not WIC
3. Plan and conduct comprehensive outreach efforts that will ensure those individuals identified through the referral data matching process will be connected to WIC
4. Create an advisory council or other mechanism to obtain input from key partners to advise on culturally appropriate outreach strategies related to the focus of your project
5. Craft an evaluation plan and collect data for measuring the key performance indicators (KPIs) and outcomes of the project

MORE WIC! will provide TA on each of these activities to all potential applicants during the pre-award phase. Refer to the [website](#) and [RFP](#) for further information about TA webinars and how to schedule TA appointments. MORE WIC! will provide continuous support to subgrantees funded through this mechanism. As stated above, WIC State agencies with other funding who seek TA for one or more of these activities should contact MORE WIC! directly to develop a plan for assistance by emailing morewic@jhu.edu or using the [contact form](#) on the website.

Equitable access to WIC

MORE WIC! aims to improve equitable access to WIC services, and thus, prioritizing equity is a focus of MORE WIC! Current WIC coverage estimates in each State agency may indicate areas or population groups to focus on to improve equitable access to WIC (for example, pregnant individuals, rural living, individuals with primary language other than English). This may look different for each State agency depending on their WIC-eligible populations, and **State agencies should identify in what ways they seek to improve equitable access through this project, and state relevant project objectives in their application.**

For example, if a State agency identified increased WIC enrollment in a specific region (Counties X and Y with the largest enrollment gap statewide, or counties where a high proportion of the population are part of a historically disadvantaged group with low WIC

enrollment) as their equity focus, then the implementation and evaluation plan would be built around that focus. For instance, if a State agency wanted to increase coverage of pregnant women throughout the State agency’s jurisdiction, then considerations for data sharing, data matching, outreach, and monitoring enrollment might include data disaggregation by participant category to evaluate effectiveness among this subpopulation. MORE WIC! will provide TA to applicants to help them develop this project component, refine their objectives and initial implementation, outreach and evaluation plans, and to finalize plans if funded.

Project timeline

State agencies should develop a timeline that reflects their project objectives, and considers their starting point, staffing, and resources. To facilitate the development of timelines, we provide some general guidance (Table 2). We estimate that following initial outreach, follow up for 8 months is needed to identify WIC enrollment, participation and early retention (see Activity 5 for definitions of these outcomes)

Table 2. Hypothetical Timelines for State agency Learners, Intermediates, and Leaders

Project Activity	Learner	Doer	Leader
Project planning, intake assessment, individual TA plan	Months 1-2	Months 1-2	Months 1-2
Creating or modifying DSA	Months 2-12	Months 2-8	Done!
Planning for outreach Advisory Council	Months 11-12	Months 8-9	Months 3-5
First data match	Month 13	Month 9	Months 5-6
Executing user testing, A/B testing, pilot testing	Months 13-18	Months 9-15	Months 7-13
Expanding outreach and moving towards maintenance	Months 19-28	Months 16-28	Months 14-28
Periodic progress and outcome reporting	Months 4-30	Months 4-30	Months 4-30

Activity 1: Data sharing

To be able to create referral data matching processes and procedures, the State agency will receive TA to create new or modify existing DSA (or similar types of agreements) with Medicaid, SNAP, and potentially other programs. Data sharing is the process of providing other agencies or entities with access to information that they cannot already access in their own systems. The DSA is a legal document that details how programs will collaborate, what data will be shared, and how it will be used. Executing a new or modified DSA can take significant time, especially if SNAP or Medicaid is administered by a different agency than WIC. It is understood that a funded State agency who is a “Learner” may focus on establishing or modifying a DSA for a significant portion of the first year of their project period. However, as the DSA advances, plans for outreach and the formation of the advisory council can progress.

A DSA commonly includes components such as business justification, scope of services, term agreements, data specification, and other provisions to outline the data being shared. When completing the Data Matching Plan section of the MORE WIC! application, please consider or respond to the following key points to inform your DSA and data sharing process:

- Do you intend to conduct a data match with SNAP, Medicaid, or both (along with additional income-eligible programs, if desired)? Why?
- Do you know where the data is housed and how you will access it, including whether you will need to work with vendors? If not, how will you find out? What are the implications of this information for who you will need to work with, staffing and budget?
- What specific pieces of information (data fields/data elements) will you need to identify WIC-eligible nonparticipants, conduct outreach to them, and complete an evaluation? Common examples include:
 - Participant Information: First and last name, Date of birth; If a child – who is their authorized representative or head of household
 - Contact Information: Phone number, Mailing address, Email address
 - Demographic Information: Race, Ethnicity, Age, Gender
 - Program Identifiers: Medicaid program ID, SNAP program ID, other
 - Preferred language (reading or speaking)
- Do you know if protocols are in place to securely share data from one agency to another (such as Secure File Transfer Protocols, or SFTP)? If not, how will you find out and ensure secure protocols are in place?
- Do you have an existing DSA that can be used for this project?
 - If not, you should plan to create one as part of your project.
 - If yes, does it provide you with sufficient information to identify WIC-eligible nonparticipants, conduct outreach to them, and collect the necessary data for your evaluation? Otherwise, the DSA will need to be amended as part of your project.

State Agency Example

[A sample DSA template from a pilot project in Virginia](#)

illustrates how the state's Department of Health (which administers WIC) and the Department of Social Services (which administers Medicaid, SNAP, Temporary Assistance for Needy Families, and Foster Care programs) entered into an agreement along with a third-party organization for text-based outreach to WIC-eligible families.

Additional Resources for Data Sharing

- [WIC Policy Memorandum #2023-5: Data Sharing to Improve Outreach and Streamline Certification in WIC](#), USDA
- [Matching Data Across Benefit Programs Can Increase WIC Enrollment](#), BDT and CBPP
- [Toolkit: Increasing WIC Coverage Through Cross-Program Data Matching and Targeted Outreach](#), “Sharing Data” & “Data Sharing Agreement,” BDT and CBPP

Activity 2: Data matching

Data matching is the process of comparing data across data sets and finding records that refer to the same person, entity, or case. By matching WIC enrollment data against data from SNAP, Medicaid, and other programs, State agencies can find useful information about SNAP and Medicaid participants who don't already participate in WIC through process of elimination — i.e., those who appear in the SNAP or Medicaid data but *not* WIC. The information on eligible, unenrolled individuals found through a data match — such as names, contact information, demographic information, and more — can help your State agency to better understand enrollment gaps and test outreach strategies tailored to specific groups.

When your State agency conducts the first round of data matching, you will likely identify many eligible non-participants for referrals and outreach. However, with procedures in place for consistent, repeated data matching (such as on a monthly or quarterly basis), State agencies can have a steady and anticipated volume of new eligible non-participants identified through each data match. For instance, newly pregnant eligible non-participants newly enrolled in Medicaid would be added to your WIC outreach list with each subsequent data match. This larger volume of WIC-eligible non-participants identified with the first match provides an opportunity for beginning to test outreach strategies (discussed in the next section).

TA provided through MORE WIC! will help WIC State agencies develop an actionable plan for data matching. Some key information will help MORE WIC! work with you to build your initial plan for the application and your subsequent plan, if funded.

- How is the data structured across different programs? For example, Medicaid is an individual benefit whereas SNAP is a household benefit.
- Based on the DSA and your answers from the prior section, what personal identifiers will you use to identify common cases across data sets?
- Related to that, will the data match include all the information you will need for outreach and evaluation?
- What filters can be applied to the data to identify the specific population(s) you wish to reach? For example, can data be filtered for WIC-eligible categories including infants and children under age 5 and pregnant and postpartum individuals?
- How frequently (monthly, quarterly) will you conduct data sharing and matching as an ongoing activity to refresh the pool of WIC-eligible non-participants for outreach?

Disaggregating the data generated through matching can help uncover trends and test new ways to reach people who are eligible for, but not participating in, WIC. Data disaggregation involves taking a single measure — such as “number of people on Medicaid but not WIC” — and breaking it down by characteristics or segments of the population. For example, the data could be disaggregated by demographic characteristics such as race, ethnicity, language, age, geographic region, WIC participant category, and more. Doing so can help refine outreach strategies and messages to specific target audiences.

Additional Resources for Data Matching

- [Matching Data Across Benefit Programs Can Increase WIC Enrollment](#), BDT and CBPP
- [Considerations for Sharing and Matching Data](#), BDT and CBPP

Activity 3: Planning for Outreach

The list generated through a data match can be used for several different types of referrals and outreach. Key questions to consider when developing a plan that is well suited to the target WIC-eligible non-participants include: 1) whether or not a referral from the original program is required, 2) which methods of outreach will be used, 3) how frequently outreach will be conducted, 4) how will we monitor the implementation and know we are succeeding, 5) what does this plan mean for staffing at the local agency?

If WIC referrals and outreach are currently being conducted or if it has been done recently, consider the methods used, and to what degree those methods are effective. It is also helpful to understand if outside entities such as non-profits or community organizations are conducting outreach (or could be partnered with for outreach). With that in mind, having a clear understanding and goal of the targets for new outreach as a part of MORE WIC! will help shape decisions about outreach design and plans for testing (see below).

Technical considerations and resources play an important role in planning for outreach. Outreach should consider the cost, needed data fields, steps for referrals if required, initial set up, and maintenance for ongoing efforts. Outreach communications can be sent by the State agency, another state or local agency, or a third-party contractor. The capacity of WIC clinics to follow-up in a timely manner with those who respond to the outreach should be considered when planning the frequency and quantity of outreach efforts. Technical assistance provided through MORE WIC! will assist State agencies to ensure their outreach processes align with industry best practices and are compliant with applicable laws such as the Telephone Consumer Protection Act of 1991.¹

When developing an outreach plan, some State agencies may find it valuable to complement their targeted data-driven outreach efforts with planned or existing untargeted community-level outreach, including partners such as health care, Head Start, home visiting, and community-based organizations. Their roles as trusted messengers may be highly valuable in promoting the benefits of WIC participation. Untargeted outreach through social media platforms such as Facebook can be a key communication tool within specific communities, and a sustainable way to support targeted outreach for enrollment.

¹ <https://www.fcc.gov/sites/default/files/tcpa-rules.pdf>

In some communities, partnering with health care, home visiting, and community-based organizations can further encourage WIC enrollment. For this project, untargeted outreach should be considered a complementary strategy that should be combined with a targeted outreach approach. Although MORE WIC! grants cannot be used to **fund** untargeted community-level outreach, many State agencies may already have existing or planned untargeted outreach initiatives that can complement their targeted outreach through MORE WIC! in important ways and that should be accounted for in evaluations.

When considering options for outreach approaches, State agencies that have data sharing in place may want funding and TA to identify how to **optimize** their outreach strategies. MORE WIC! will support the evaluation to help State agencies determine which outreach strategies most successfully lead to WIC enrollment and participation.

Additional Resources for Planning Outreach

- [Toolkit: Increasing WIC Coverage Through Cross-Program Data Matching and Targeted Outreach](#), “Outreach Plan,” BDT and CBPP
- [Considerations for Different Outreach Mediums](#), BDT and CBPP

Crafting Outreach Messages

The framing of an outreach message can directly affect whether it is read and understood, and whether the recipient takes the action requested of them or engages at all. State agencies should consider user-centered content and obtain feedback from the target audience when crafting messages.

The outreach modality and spoken languages of the targeted audience will inform the outreach message content. The modality, such as text, mail, email, or phone, will shape the length of the message. Using short, clear, welcoming, and actionable language can engage participants in a dignity-affirming manner. It is recommended that messages be written in a way that comes from a trusted messenger, such as using a person’s name as the sender in the message and a phone number with the region’s area code. Each message should have a clear call to action that includes a phone number or link to direct the recipient to assistance to enroll in WIC. The MORE WIC! Team will provide support and resources as State agencies craft and test these messages.

Additional Resources for Crafting Outreach Messages

- [Toolkit: Increasing WIC Coverage Through Cross-Program Data Matching and Targeted Outreach](#), “Outreach Messaging,” BDT and CBPP
- [Applying Behavioral Science to Improve WIC Outreach Messaging](#), ideas42 (for BDT and CBPP toolkit)

Testing or Piloting Outreach Strategies

As mentioned earlier, the first data match will identify a number of WIC-eligible non-participants for outreach, and this presents an opportunity for State agencies to begin to test different messages or messaging strategies to determine the best way(s) to reach their target population. A/B testing of messages (i.e., comparing two options) can help evaluate how different content, framing, timing, modalities, or calls to actions are perceived by target audiences. Engaging in user testing can provide new insights especially for State agencies already engaging in some forms of outreach. If participant language is available from the data match, messages can be created in or translated to the languages of the individual or household.

Showing people different versions of a communication message and asking them which one resonates best is a basic version of A/B testing. The advisory council may be used for this purpose; gaining feedback about aspects of messaging to test and how the messages are received can give insight into message perception, especially if translated into another language.

Following creation of the DSA, and engaging in data matching, State agencies will pilot test their communication strategies. Pilot testing involves conducting outreach to a subset of the WIC-eligible nonparticipants and observing what happens before finalizing the outreach approach. This could involve A/B testing to compare 2 or more options for outreach with follow up to assess engagement with the message, and using WIC MIS or administrative data to see how many communicate with WIC and set up appointments. Given that conducting outreach to everyone from the initial data match at once may not be feasible, State agencies could choose to randomize WIC-eligible non-participants into groups and stagger the timing of outreach to these groups. With this approach State agencies can compare WIC enrollment among those who receive outreach and those who don't (this "control group" is yet to receive outreach – but will). Decisions about the best way to pilot test messages depend on the focus of the project, and the pool of WIC-eligible non-participants available for outreach testing. MORE WIC! can assist in building a basic strategy for the application and support adjustments as the project progresses.

State Agency Example

Louisiana conducted an A/B test to examine the success of different text messages for encouraging recipients (caretakers with one or more children enrolled in Medicaid but not WIC) to respond to outreach and schedule a WIC appointment. Caretakers were randomly assigned to receive one of three different text messages about their eligibility for WIC:

- **Control:** Hi, this is Luna from Louisiana Women Infants & Children (WIC) Program. You may be eligible for food and cash benefits (about \$50/month) from WIC. Call to apply: XXX-XXX-XXXX

- **Treatment A – Grocery Message:** Hi, this is Luna from Louisiana Women Infants & Children (WIC) Program. You may be eligible for food and cash benefits, enough to cover 5 days of groceries (about \$50/month) from WIC. Call to apply: XXX-XXX-XXXX

- **Treatment B – Meal Message:** Hi, this is Luna from Louisiana Women Infants & Children (WIC) Program. You may be eligible for food and cash benefits, enough to cover 15 home cooked meals (about \$50/month) from WIC. Call to apply: XXX-XXX-XXXX

Evaluation found no statistically significant differences in the response rates to the messages, suggesting that more research is needed to understand what messages resonate with WIC-eligible audiences and specific sub-populations – lessons we hope to learn in this project!.

Additional Resources for Testing or Piloting Outreach Strategies

Innovations to Streamline Enrollment

When outreach is targeted to people identified through a data match with SNAP or Medicaid, protocols for conducting their certification appointments can be simplified. Because these applicants are adjunctively income-eligible for WIC, sufficient data should be readily available to affirm income eligibility at the time of certification.

It is important that the WIC staff who follow up with applicants have a way to identify that they are adjunctively eligible so that the certification process can be tailored to streamline checking income and, when applicable, other eligibility documentation.

It is helpful to send additional messaging to those that respond to outreach with appointment reminders or information about documentation to send or bring to their appointment.

Customizing messaging for adjunctively eligible applicants can streamline the experience of certifying for the applicant and for the WIC staff. Where applicable, flexible scheduling for appointments such as online, walk-in, telephonic, and virtual appointment options can make it easier for applicants to complete the certification process. Flexible options for providing needed documentation, uploading documents, or sending secure emails can also ease the burden of enrolling in WIC.

State Agency Examples

Two State agencies that piloted targeted outreach simplified the certification process by relying on the documentation of adjunctive eligibility to meet additional documentation requirements.

Massachusetts used the MassHealth (Medicaid) ID obtained through the data match to confirm, before the certification appointment, that the applicant was still participating in MassHealth, which documented adjunctive income eligibility and residency.

Montana developed special scripting for WIC staff to follow when calling to schedule certification appointments for applicants included in the data matching pilot. The script advised applicants that they only needed to bring identification to the appointment.

Additional Resources for Streamlining Enrollment

- [WIC Policy Memo #2023-6: Streamlining Certification Documentation Guidance](#), USDA
- [Toolkit: Increasing WIC Coverage Through Cross-Program Data Matching and Targeted Outreach](#), “Streamlining Certification,” BDT and CBPP
- [Assessing Your WIC Certification Practices](#), CBPP

Leveraging Other Tech-Based Approaches to Data Sharing and Referrals

In addition to the data matching, referral, and outreach processes described above, some WIC State agencies have implemented technology solutions that automatically share data and refer eligible people to WIC when they apply for another federal benefit such as Medicaid, SNAP, or TANF. State agencies have done this in two main ways: (1) including WIC in integrated benefits applications, and (2) establishing automated referrals to WIC when an application for another benefit is approved.

One advantage of these solutions is that individuals may be primed to pursue WIC enrollment when they are already seeking other assistance. These approaches can be combined with regular data matching and outreach processes to reach people who have already been enrolled in another benefit for some time as well as brand new applicants.

Additional Resources for Tech-Based Approaches for Data Sharing and Referrals

- [2023 WIC Technology Landscape Report](#), Nava Public Benefit Corporation and the National WIC Association
- [Leveraging Cross-Program Data to Modernize Outreach & Enrollment in SNAP & Connected Benefits](#), American Public Human Services Association

Activity 4: Establishing an Advisory Council

In the prior sections we have explained how data matching and disaggregation can inform State agency outreach strategies, and how user testing and feedback can refine or improve outreach strategies for pilot testing. It is important to include community members from the beginning of outreach design, during outreach, and during the evaluation stage. To that end, each State agency should develop plans to create and engage an Advisory Council for their project. The timing of the formation of the Advisory Council will depend on your State agency's previous experience with outreach and preparation to engage in activities as a Learner, Doer, or Leader (as shown in Table 2).

Creating an Advisory Council with WIC participants, WIC-eligible non-participants, community-based partners, and others with lived experience and on-the-ground program expertise is an equity-focused strategy for designing culturally appropriate outreach strategies and enhancing community engagement. Advisory Council members can provide insight and feedback on messaging to ensure it is easy to understand and clear how to enroll in WIC, provide insights into addressing logistical challenges, and provide valuable insights on feasible evaluation approaches, among many other activities. Sharing experiences scheduling and/or attending appointments can help State agencies identify participant challenges or bottlenecks. Then, State agencies can implement new practices to streamline enrollment centered around lived experience and most common roadblocks.

State agencies should consider community engagement and input when planning for the sustainability of outreach. The National WIC Association has prepared guidance on best practices for establishing Advisory Councils for the MORE WIC! project.

Resources for Establishing Advisory Councils

- [MORE WIC! guidance on best practices for establishing Advisory Councils](#)
- [Toolkit: How to build a participant advisory council](#), Nava Public Benefit Corporation
- [A Guide to Creating Impactful WIC Research Projects and Collaborating with WIC Agencies](#), National WIC Association

Activity 5: Evaluation Plan for Implementation and Outcomes

Data need to be collected to monitor the implementation and outcomes of each subgrantee project (and across all subgrantee projects), with the aim of addressing the following key questions:

1. Can referral data matching and outreach reduce the enrollment gap?
 - a) How many eligible individuals are identified through matching and how many are not participating in WIC? How do these numbers change over time given repeated data matching and outreach?
 - b) How many of those identified will enroll (or re-enroll) in WIC following outreach? How many will participate in WIC (first benefit issuance; redemption, if time permitting in study design)?
 - c) How many of those identified and who enroll will have a second benefit issuance or redemption (marker for early retention)?
 - d) What outreach strategies work and for which population groups?
 - d) Can data matching and outreach enhance equitable access to WIC services (reduce the enrollment gap in an underserved population as defined by the State agency) and what factors affect the degree to which equitable access is improved?
2. What is the impact of data matching and outreach on (monthly or quarterly) caseloads at local agencies?
3. Are data matching and outreach sustainable strategies for the State agency?
4. What policies, systems, and environments (PSE) are needed for data matching and outreach, what are the barriers, lessons learned and best practices?

For the subgrant application, State agencies are asked to develop an initial implementation and evaluation plan for their project. This plan should be based on the State agency's project objectives and equity focus. MORE WIC! will work with applicants during pre-award and with subgrantees post-award to establish reasonable timelines for milestone completion.

State agencies will have different timelines for completion of key project activities depending on their starting points (see Table 2 for illustration). For example, State agencies may differ in their projected timelines for creating or amending a DSA, and some State agencies may already have the DSA in place. Some projects may want to extensively conduct A/B testing of outreach strategies, whereas others may have prior knowledge and plan for more limited pilot testing before expanding their outreach efforts to evaluate impact of outreach on enrollment and participation in WIC, and moving towards finalizing their PSE for sustainability.

MORE WIC! is guided by the RE-AIM Framework.² (Table 3). The framework components are reflected by its name (Reach, Effectiveness Adoption, Implementation, Maintenance). RE-AIM has been used previously in the WIC setting as a basis for the evaluation of programs.³

Table 3. Overarching Implementation & Evaluation Questions for State agency

RE-AIM Framework	Overarching Implementation & Evaluation Questions
Reach	How well is my project reaching those eligible through Medicaid and SNAP and getting them to enroll in WIC?
Effectiveness	How well is my outreach strategy working?
Adoption	How well is my project initiating the policies, systems, and environment (PSE) to achieve MORE WIC! objectives?
Implementation	To what extent is my project's matching, outreach, and engagement working as planned?
Maintenance	How well does my project incorporate the processes to achieve sustainability of data matching and outreach activities over the long term?
Equity	How well are my project's approach, PSE, and outreach improving equitable service delivery?

The information to be collected to address the questions in Table 3 includes: 1) data to evaluate reach and effectiveness, 2) reported project milestones, and 3) assessment of progress and challenges. To facilitate development of State agencies' evaluation plans, MORE WIC! has identified a streamlined set of key performance indicators (KPIs) for subgrantees to use and report to MORE WIC! to document project reach and effectiveness (Table 4). These KPIs are specified in general terms here but will be disaggregated by matching agency (SNAP or Medicaid or both or others), participant characteristics, region, or equity focus as appropriate for individual projects. State agencies should also identify questions they wish to address and related KPIs that are unique to their project and their equity focus. MORE WIC! can assist with the identification and specification of questions and KPIs through extensive technical assistance to subgrantees.

² Glasgow RE, Harden SM, Gaglio B, et al. (2019). RE-AIM planning and evaluation framework: Adapting to new science and practice with a 20-year review. *Frontiers in Public Health*, <https://doi.org/10.3389/F PUBH.2019.00064>

³ Morris EJ, Quinn E L, Rose CM, et al. (2022). Insights from Washington State's COVID-19 Response: A Mixed-Methods Evaluation of WIC Remote Services and Expanded Food Options Using the RE-AIM Framework. *Journal of the Academy of Nutrition and Dietetics*, 122(12) <https://doi.org/10.1016/J.JAND.2022.03.013>

Subgrantee reports on milestone completion, progress, barriers or challenges and lessons learned will be submitted quarterly throughout the project.

Key milestone indicators to be reported include:

1. Execution of DSA (where needed)
2. First data match
3. Formation of advisory council
4. Development of outreach plans and messages
5. Pilot testing of outreach strategies
6. Start of expanded outreach efforts

MORE WIC! will work with subgrantees post-award to finalize a robust evaluation plan for their projects along with the timeline for reporting.

Table 4. Key Performance Indicators (KPIs) for Reach and Effectiveness

RE-AIM Component	Key Performance Indicator
<p>Reach <i>How well is my project reaching those eligible through Medicaid and SNAP and have them enroll in WIC?</i></p>	<p><i>Objective: Identify those who are eligible but not enrolled in WIC (enrollment gap)</i></p> <ol style="list-style-type: none"> 1. The number of WIC-eligible individuals identified through SNAP and/or Medicaid referral data matching processes* 2. The number of WIC-eligible individuals identified through SNAP and/or Medicaid referral data matching processes who are already enrolled in WIC (i.e., the WIC coverage rate among those participating in SNAP and/or Medicaid) 3. The number of WIC-eligible individuals identified through SNAP and/or Medicaid referral data matching processes who are not enrolled in WIC
<p>Effectiveness <i>How well is my outreach strategy working?</i></p>	<p><i>Objective: Track outreach efforts</i></p> <ol style="list-style-type: none"> 1. Total number of WIC-eligible individuals from SNAP and/or Medicaid data matching not enrolled in WIC who receive outreach 2. Total number successfully contacted via outreach efforts (i.e., received and confirmed outreach) 3. The number of those successfully contacted who filled out online applications or pre-applications, or who scheduled certification or recertification appointments 4. The number of those successfully contacted who ultimately enrolled or re-enrolled in WIC (within project goal or later) 5. The number of those successfully contacted who ultimately enrolled and participated in WIC (1st benefit issuance or redemption, if available) 6. The number of WIC enrollees identified through data linking and outreach who are retained (e.g., 2nd benefit issuance or redemption, if available).

* The KPIs are presented in general form. It is expected that there will be separate KPIs by participant characteristics, matching agency, and other relevant factors.

Subgrantees are expected to provide de-identified data to MORE WIC! to support the estimation of the KPIs listed in Table 4 as well as project specific KPIs. This will allow for the evaluation of individual projects and contribute to learning across all subgrantee projects. MORE WIC! will work with State agencies as they develop their applications to identify a strategy for data analysis and reporting consistent with State agency resources, personnel, and information technology environment. De-identified data are data that do not identify individuals. Two primary strategies are:

1. State agency conducts the data analyses (co-developed and supported through TA) and submits to MORE WIC! reports that provide summary data so that MORE WIC! can construct KPIs to support the evaluation of the project. Summary means that the data are in aggregate form (e.g., number of families with WIC eligible individuals not enrolled in WIC, number of individuals contacted through outreach that enroll in WIC).
2. State agency shares one or more de-identified individual-level data sets (co-designed with MORE WIC!) so that MORE WIC! can analyze the data to produce the KPIs for project evaluation and share results back with the State agency for feedback and interpretation.

Regardless of strategy chosen, MORE WIC! will provide subgrantees with TA to support evaluation data collection, data transfer, and analysis and results interpretation. This will occur through monthly TA calls and/or as needed depending on the project's timeline. MORE WIC! will also assist as needed with report writing (for example, how to explain the results in the final report, in a presentation or in a manuscript).

Resources for Evaluation Plan

[Toolkit: Increasing WIC Coverage Through Cross-Program Data Matching and Targeted Outreach](#) “Setting Goals” and “Evaluation Plan,” BDT and Center on Budget & Policy Priorities

Please contact us with questions or to identify the best plan for your State agency to advance on data matching and outreach. Our email address is morewic@jhu.edu and our website is www.morewic.org.