Planning Tool 13:

**Sustaining Data Matching and**

**Targeted Outreach**

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|  | PurposeTo ensure your data matching and targeted outreach initiative is sustainable, it is helpful to think about what actions you can take early in the planning and implementation process to incorporate this mode of outreach into your ongoing program operations. |

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|  | Key ConsiderationsOnce a data sharing agreement (DSA) is in place, a regular process for exchanging data and conducting text-based outreach can be incorporated into agencies’ routine activities. Establishing this business process could help connect more adjunctively eligible families to WIC and slow or reverse the decline in WIC coverage. These practices don’t happen by chance, however; often protocols or policies are needed to support targeted outreach. Your targeted outreach strategies can also be enhanced over time to fit the changing needs of your target group or staff. |

1. **How can your team incorporate data sharing and targeted outreach practices into ongoing operations?**

***Example:*** *Create formal DSAs between agencies that establish regular information sharing in support of data matching and text-based outreach on an ongoing basis. Additional fields can be added to the management information system (MIS) to note the source of outreach and measure its effectiveness.*

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1. **What agencies, departments, divisions, and/or individuals would be involved in implementing these activities regularly?**

***Example:*** *If centralized follow-up is planned, the state needs to identify staff to follow up with outreach recipients (e.g., to schedule a certification appointment). If local follow-up is planned, local agency staff might need to implement streamlined certification practices for applicants identified through data matching.*

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1. **What changes would need to be made, or what actions would need to be taken, to institutionalize the practice?**

***Example:*** *If centralized follow-up is planned, state staff conducting follow-up would need access to local agencies’ certification appointment scheduling systems. If local follow-up is planned, state staff would need to develop a guidance document and conduct training for local agencies.*

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1. **What resources are required for these steps to occur, or what else would help make this process sustainable?**

***Example:*** *Training for local agency staff on targeted outreach methods, data management, and reporting would need to be incorporated into ongoing training.*

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