Planning Tool 3:

**Documenting the Data Landscape**

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|  | PurposeThis planning tool is designed to help a team understand what data are already being collected across different programs and how the data can be used to measure cross enrollment or for targeted outreach. **There are two main sections:** 1. What data are available? 2. How are data accessed? |

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|  | Whom Should You Consult?* **Other benefit agencies:** To thoroughly complete this tool, you will want to discuss the questions with each of the agencies that manage the programs you are considering as potential data sources for targeted WIC outreach (e.g., Medicaid, SNAP, TANF, foster care).
* **Data and technology experts:** Involving the data experts that manage this information and can oversee its transfer will be essential to understanding if data are being captured completely, correctly, and consistently. In addition, you may find it helpful to check with members of your technology team to understand if any existing data sharing agreements are in use, as well as what data are being maintained and shared.
* **Legal counsel:** You may also want to consult with your legal counsel regarding any data sharing agreements (DSAs) currently in place to clarify what information is being shared and under what conditions.
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|  | Other Considerations* As you complete this tool, it will be helpful to refer to the [Considerations for Sharing and Matching Data](https://www.cbpp.org/sites/default/files/cbpp_bdt_wic_toolkit_considerations_for_sharing_and_matching_data.pdf) resource.
* It will also be helpful to consider information already available to you on the extent to which WIC-eligible individuals are enrolled in Medicaid or SNAP but not in WIC to understand the magnitude of the gap you are trying to close and to assess whether you have enough information to analyze who is missing out. If you do not have enough information, it will be helpful to build into the evaluation plan you create later in this toolkit a plan for developing a baseline measure.
* In 2020, Congress directed USDA to begin publishing state-level estimates of pregnant individuals, infants, and children under age 5 who are participating in Medicaid or SNAP but not WIC. Once those estimates are available, it will be important to consider whether to use the same methodology to measure the enrollment gap, monitor progress over time, and assess the effectiveness of outreach. There are advantages to using data that are consistent with what USDA publishes, but administrative data might be available to you that allow for a more precise estimate or are available more promptly, in which case you might choose to use them.
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**1. What data are available?**

Use the table below to guide you in documenting what data are available from WIC as well as each of the programs you are considering using as data sources to measure cross enrollment and conduct targeted outreach. The first row has been provided as an example.

\*For more information, see the sections on “Data Sources, Outreach Method, Data Structure, and Personal Identifiers” in the [Considerations for Sharing and Matching Data](https://www.cbpp.org/sites/default/files/cbpp_bdt_wic_toolkit_considerations_for_sharing_and_matching_data.pdf) resource

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| **Potential** **data source** | **Available data for targeted outreach** | **Data provided in** **current DSA** | **Data format and** **additional considerations** |
| ***Example:*** *Medicaid* | *Name, address, phone number, unique ID number* | *No DSA in place* | *Medicaid is an individual benefit whereas SNAP is a household benefit. These different structures will matter when matching and using the data.* |
| WIC |  |  |  |
| Other program 1 (e.g., Medicaid, SNAP): \_\_\_\_\_ |  |  |  |
| Other program 2 (e.g., Medicaid, SNAP): \_\_\_\_\_ |  |  |  |
| *Add rows as needed…* |  |  |  |

**2. How are data accessed?**

1. **Where are the data housed and in what format?**

***Example:*** *The data are housed in a state database managed by the central data warehouse and will be exported as a comma-separated values (CSV) file from each agency’s system.*

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1. **Who has access to the data and what level of detail do they have access to?**

***Examples:*** *State and local WIC staff can see data in WIC’s management information system (MIS) (sometimes individual-level data, depending on the use). WIC data reports can be generated by data professionals at the state agency (usually de-identified data). Staff at a centralized data warehouse can generate data reports for Medicaid and SNAP programs based on specified queries (individual-level data).*

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1. **Are there processes for requesting data reports from state systems? If yes, what are they?**

***Example:*** *There is a data request form that requires an explanation of how the data will be used; review typically takes two weeks.*

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1. **What are the potential barriers to accessing and using that data?**

***Examples:*** *Data are not consistently collected. Updated data are not stored centrally. Phone numbers aren’t reliably marked as cell/home. Current data sharing agreement doesn’t allow for secondary parties to access and use data for outreach. Staff have limited capacity to retrieve and analyze the data.*

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1. **What additional information or process changes would enable easier, more effective data sharing?**

***Example****: Revise data sharing agreement to allow for easier and more complete information sharing using individual-level data.*

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