

WIC Case Study: San Diego State University Research Foundation, California



WIC Agency Profile

The SDSURF WIC Program, operated through San Diego State University’s Research Foundation, serves 28,700 participants in 11 WIC sites located primarily in urban communities in San Diego County, California. Slightly more than half of new applicants access the program through its centralized “call center,” which handles appointment requests; other applicants and most ongoing participants schedule appointments in person at a WIC site. Generally at the WIC sites, any of the trained WIC staff conduct the initial eligibility determination (demographic, income, residence, and identification) and a different WIC staff member – who must be qualified to provide nutrition counseling – conducts the nutrition risk assessment portion of the certification appointment.

Project Description

Challenge SDSURF WIC wanted to address barriers that new applicants and participants experience in completing the WIC certification process. The WIC Certification Streamlining Project built on a project to improve program retention that began in September 2016.

Goal Increase successful certification rates in enrollment and re-certification appointments by improving client support systems

Strategy In November 2017, the agency began mailing new informational materials (in English and Spanish) to those who contacted the call center in advance of their enrollment or recertification appointment. These materials outlined “what to expect” and “what to bring” for a certification appointment, including which information clients could show electronically. The mailings included a nutrition questionnaire that clients could fill out before the appointment. The agency also posted all materials on its website.

The agency surveyed staff in December 2017 to assess their awareness and use of a recent policy change allowing the use of electronic

Key Takeaways

San Diego State University Research Foundation (SDSURF) WIC sought to increase successful completion of certification appointments by:

- Mailing informational materials and nutrition questionnaires ahead of appointments;
- Texting consenting applicants and participants three days prior to appointments; and
- Educating clients on California’s new electronic document policy.

As a result of these changes:

- Participant perceptions of appointment length fell for families who received mailed information;
- The number of new enrollments increased; and
- 54 percent of participants who received mailed information were aware of the new electronic document policy, compared to 37 percent of participants who did not.

documents to determine program eligibility. It found that all staff were aware of and implementing the policy; however, the staff suggested that many applicants and participants were not aware of the policy and not prepared to share electronic documents. Instead of staff training, the agency increased efforts to educate applicants and ongoing participants about this option.

To expand use of text messaging, in February 2018 call center staff began asking participants contacted by phone if they would prefer to receive their appointment reminder by text rather than phone in the future.

In June 2018, the agency launched an enhanced text messaging service for enrollment and recertification appointments. All consenting applicants and participants received texts three days prior to their appointment, with the appointment date, time, location, and a map with directions to the site. For new applicants, the text also included a link to information on the agency's website regarding "what to expect" and "what to bring."

Outcome

The mailing strategy improved appointment efficiency. Two-thirds of applicants and participants that received mailings completed the required forms before the appointment. These clients also reported shorter appointment durations. A survey found that 54 percent of those receiving mailed program information were aware of the e-document policy, compared to 37 percent of those who did not receive the mailing.

The additional texting support was popular and had a broad reach. When given the text option, clients strongly preferred it over phone communication. Texts also reached more applicants and participants than mailings because texts were sent regardless of how an appointment was made, whereas only those who contacted the call center received mailings.

The average number of enrollments among the subset of families who were new to WIC rose 39 percent between September 2017–February 2018 and March 2018–August 2018. The increase may be attributable to the additional enrollment support. There were also more successful new family enrollments in June and July of 2018, the first two months of the text service, than in June and July of 2017.

Client satisfaction with the appointments and certification process, assessed via a participant survey at the end of the project, was high (94% reported the highest level of satisfaction).

SAN DIEGO STATE UNIVERSITY
Research Foundation

CALIFORNIA WIC
WOMEN, INFANTS & CHILDREN

Your Enrollment Appointment
what you can expect . . .

1st—We will verify WIC eligibility
Remember to bring the items of proof or a picture of these items on your phone

2nd—You will participate in a nutrition assessment, including:

- ◇ Height
- ◇ Weight

3rd—We will discuss your nutrition questions and concerns
To prepare, fill out any enclosed Nutrition Questionnaires

4th—You will receive WIC checks, and learn how to use them

We look forward to seeing you!
Call if you have questions
1-888-999-6897
www.sdsuwic.org

Texting

3 days before scheduled appointment:

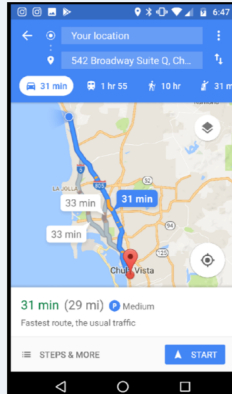
Text 1

To all those with re-certification appointments

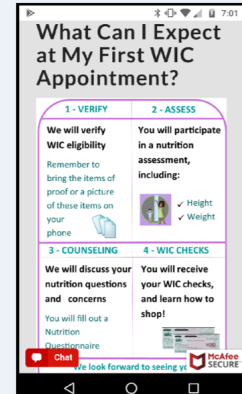
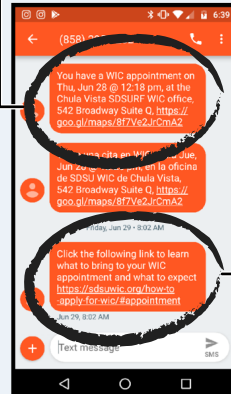
Text 1 & 2

To all those with enrollment appointments

Text 1: Date, time, WIC site address, and link to map



Text 2: What to expect, bring, and link to website

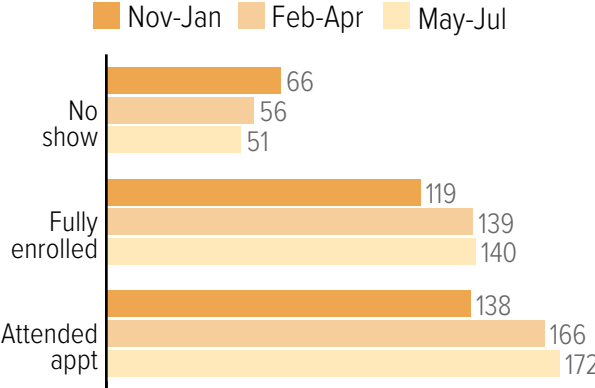


Lessons Learned

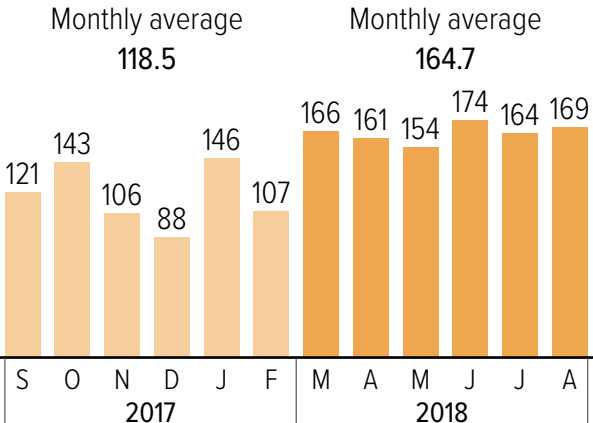
SDSURF WIC did not anticipate the high level of staff familiarity with newer E-document policies when it began planning the project. After completing the staff survey, the agency shifted this aspect of the project from staff training to informing participants about the new policies. It took several steps to better inform participants about enrollment and re-certification, including providing simple written materials and interactive text reminders. Participants valued receiving participant-reported appointment length and program information by text. Within a year after staff began asking about text reminders, the share of participants requesting them increased from 71 percent to 91 percent. Mailing nutrition questionnaire forms also shortened participant-reported appointment length by enabling some clients to fill out forms in advance.

The project initially focused on mailing and texting information about certification appointments, but a large percentage of applicants first contact the agency at WIC sites after hearing about WIC

Attendance and Enrollment Increased Among Those Who Received Mailings



New Family Enrollments Increased (39% increase in 6-month average)



through friends and family. In addition, most recertification appointments take place at WIC sites. SDSURF WIC soon realized that both the central call center and the sites needed to incorporate information strategies into their operations. As a result of this project, the potential participants receive the “What to Expect” insert when scheduling their enrollment appointment in person at any of the WIC sites.

Next Steps

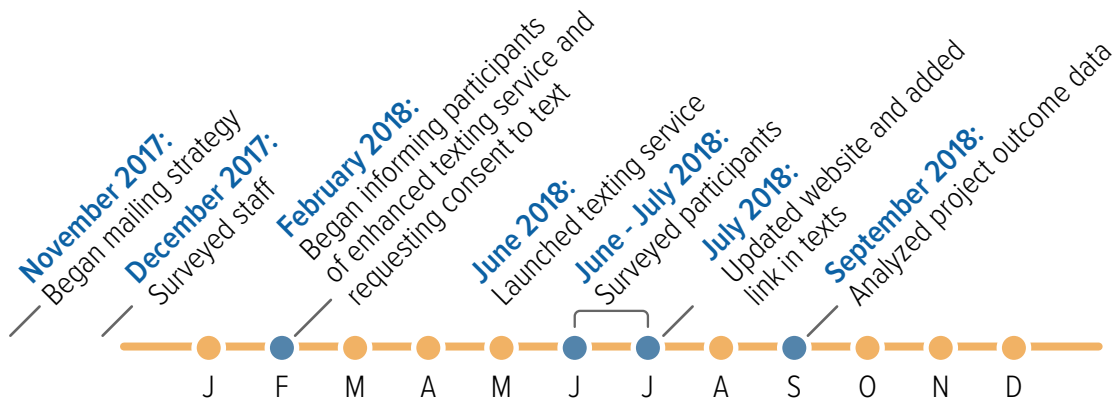
SDSURF WIC could enhance its use of interactive texting capabilities, particularly to respond to questions and rescheduling requests regarding recertification appointments, as a means to improve appointment attendance and recertification rates. Additionally, the agency could adapt some “Stick with WIC” messaging, which it developed as part of a broader effort to encourage WIC participants to remain engaged with the program, for text reminders as participants approach recertification.

As the California WIC program broadens its use of technology, including using electronic benefit cards to provide WIC foods, local WIC agencies will reduce their use of paper forms. For example, they will no longer ask participants to complete nutrition questionnaires (a change that will make the mailing strategy obsolete), while the texting strategy and the web-based information resources are expected to increase in importance.

“This project gave us a ‘launch pad’ to move forward with ideas. It’s motivating to see something produced so quickly, and the opportunity to work with other agencies and see other WIC sites was hugely beneficial.”

Project Team Member

Project Timeline



June 2021 Update

During 2019-2020, California WIC implemented a new management information system and WIC agencies transitioned to providing services remotely to protect participants and staff during the pandemic. SDSUF WIC adapted its procedures for new program applicants accordingly.

SDSUF sends information about what is needed for certification via email or text messages, and all applicants and participants provide eligibility documents electronically. SDSUF no longer mails

nutrition questionnaires in advance of appointments, since the questions are incorporated into the new WIC system screens and are thus covered during appointments. The agency sends interactive text message reminders two days before appointments rather than three days, and the text messages ask participants to reply “no” if they need to cancel their appointment. Those who reply “no” receive an automated response with a toll-free phone number to call to reschedule. Half of SDSUF’s WIC sites have implemented new enrollee support procedures to help families successfully enroll in WIC.

Project Team

Kathleen M. Merchant – PhD

Marian Marian – MSGH

Ileana Mendez – BN

Katy Schmitz – MPH

Paul Knipp – MIS

Norliza Tayag-Cruz – MS

Melbourne F. Hovell – PhD

Contact

Norliza Tayag-Cruz – WIC Director
SDSU Research Foundation WIC Program
ncruz@sdsuwic.org