



# Building Caseload Through Strategic Outreach: Using Data, Leveraging Staff, and Finding Partnerships

Michelle Gerka and Meredith Jones





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# NYS WIC Retention Work

**2017 WIC Learning Community Promising Practices to Improve Caseload & Retention**

Improving caseload and retention requires a multi-pronged strategy that spans different aspects of your local agency's operations. New York State WIC has developed a broad framework for thinking about ways to understand and address these issues. These "Promising Practices to Improve Caseload and Retention" reflect the lessons learned from real agencies across New York State, who implemented and evaluated these practices as improvement strategies.



					
Building Staff Buy-In	Outreach & Engagement	Grocery Store Experience: Preparing or Following-Up	Clinic & Appointment Systems	Using & Sharing Data	Soliciting Participant Feedback
<ul style="list-style-type: none"> <li>Hold regular meetings and huddle with all staff</li> <li>Promote monthly team-building exercises</li> <li>Provide competency-based training for all staff</li> <li>Provide resources to help staff succeed</li> <li>Offer incentives for high staff performance</li> <li>Solicit ongoing feedback and suggestions from staff</li> <li>Be transparent with staff and update them on progress, including failures</li> </ul>	<ul style="list-style-type: none"> <li>Strengthen institutional partnerships in the community (e.g., providers, schools, religious groups, local food banks)</li> <li>Use a variety of modalities (e.g., text, word of mouth, oral, or social media)</li> <li>Use word of mouth or offer a friend campaign with highly active participants</li> <li>Clearly articulate a variety of staff members for outreach</li> <li>Advertise on social media that participants use frequently</li> <li>Target traditional settings (e.g., local businesses with low-income workers)</li> <li>Offer multiple service appointment times</li> </ul>	<ul style="list-style-type: none"> <li>Track and follow-up with new participants after their first appointment (e.g., new QMS data)</li> <li>Review track redemption history to identify competitors</li> <li>Offer convenient WIC foods</li> <li>Use visual aids to assist with food packages</li> <li>Duplicate staff on the shopping experience</li> <li>Simulate the shopping experience with staff</li> <li>Use grocery store tours with new participants</li> <li>Promote targeted marketing campaigns (e.g., banners to promote for families with one year old child)</li> </ul>	<ul style="list-style-type: none"> <li>Help and educate the flow from participant's perspective</li> <li>Provide alternative hours (e.g., weekend or evenings for minor participants)</li> <li>Streamline appointment, schedule, messages and appointment</li> <li>Offer flexible scheduling (e.g., walk-in hours or days)</li> <li>Send reminder text messages for upcoming appointments</li> <li>Contact via phone immediately to reschedule</li> <li>Eliminate all distractions (e.g., use separate waiting letters and participant's contact)</li> </ul>	<ul style="list-style-type: none"> <li>Use available data and reports in WICIS and NYWC (e.g., Benefits Not Claimed, Promotional and Redemption, Conflicts, Day Lapses) to track and monitor performance</li> <li>Explore what data is available to better understand participant characteristics and behavior</li> <li>Transform data into more actionable reporting charts, graphs and tables</li> <li>Regularly share data with staff</li> <li>How staff discuss results and provide suggestions for improvement</li> <li>Incorporate case use strategies into continuous quality improvement plans</li> </ul>	<ul style="list-style-type: none"> <li>Review check redemption history to get feedback on food packages</li> <li>Follow-up with new participants or help resolve their experience</li> <li>Reach out to participants before they are discharged to understand barriers to redemption</li> <li>Ask participants about their experience and satisfaction with your local agency</li> <li>Incorporate participant feedback into continuous quality improvement plans</li> <li>Offer incentives and treat waiting room surveys (e.g., with a suggestion on a receipt sticker)</li> </ul>

For More Information on These Strategies or the WIC Project, Please Contact XXX at XXXX@caiglobal.org.  CAI

[wlc.caiglobal.org](http://wlc.caiglobal.org)



Department of Health

# Learning Objectives

- ✓ Explore how to use **data** to strategically plan outreach
- ✓ Describe **direct** (i.e., to eligible individuals) and **in-direct** (i.e., establishing relationships with medical providers) outreach strategies
- ✓ Discuss how to design and implement a **strategic plan** within your local agency



# We know participation is a concern...



WIC PARTICIPATION HAS FALLEN FROM A HIGH OF 9.2 MILLION PARTICIPANTS IN 2010 TO A CURRENT PARTICIPATION LEVEL OF AROUND 7 MILLION PARTICIPANTS.



# And we know outreach is important!

- Strengthen community partnerships
- Better understand your community
- Recruit new participants



# Chat In!

- What is going **well** and what is **challenging** at your Local Agency/in your state regarding outreach and managing caseloads?





# BUILDING A STRATEGIC PLAN



# Strategic Planning

1. Conduct an assessment
2. Define your goals and objectives
3. Determine staff roles
4. Identify outreach methods
5. Implement and evaluate



# Strategic Planning

1. **Conduct an assessment**
2. Define your goals and objectives
3. Determine staff roles
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# Step 1. Assessment



Caseload



Priority populations



Internal capacity



Partners



Feedback



# Data Isn't Scary!

- Use what you already have
- Look for what you don't have
- Keep it simple
- Involve staff
- Be creative!



# Use what you have!

Data Sources	Tips for Analysis & Exploratory Questions
Caseload	<ul style="list-style-type: none"> <li>• Look at caseload data over the last 6, 12, or 24 months.</li> <li>• How far away from your benchmark or target are you?</li> </ul>
Demographic Information	<ul style="list-style-type: none"> <li>• Compare local agency and community demographics.</li> <li>• Are there populations not receiving benefits?</li> </ul>
Referral Data	<ul style="list-style-type: none"> <li>• Where does your agency commonly refer to?</li> <li>• Are there community partners you seem to be missing?</li> </ul>



# What do you still need?

- Community demographics and need
- Feedback, perspectives, and experiences of participants and partners



# Public Data Examples

- Census Data
- USDA
  - The Food Access Research Atlas
  - Food Environment Atlas





# Census Data

United States Census Bureau

AMERICAN FactFinder

Feedback FAQs Glossary Help

MAIN COMMUNITY FACTS GUIDED SEARCH ADVANCED SEARCH DOWNLOAD CENTER English Español

Check out the early preview of our new dissemination platform at [data.census.gov](https://data.census.gov).

**Community Facts**

Find popular facts (population, income, etc.) and frequently requested data about your community.

Enter a state, county, city, town, or zip code:

Where do you want to search?

Guided Search

Advanced Search

Download Center

<https://www.census.gov/>



# Census Data

What  
do you  
want  
to  
know?



Enter a state, county, city, town, or zip code:

- Population ▶
- Age ▶
- Business and Industry ▶
- Education ▶
- Governments ▶
- Housing ▶
- Income ▶
- Origins and Language ▶
- Poverty ▼**
- Race and Hispanic Origin ▶
- Veterans ▶
- Show All ▶

**14215**

Individuals below poverty level [Bookmark/Save](#) | [Print](#)

**28.2%** Source: 2013-2017 American Community Survey 5-Year Estimates

**Popular tables for this geography:**

2017 American Community Survey

- Poverty Status in the Past 12 Months (Age, Sex, Race, Education, Employment, ...)
- Poverty Status in the Past 12 Months of Families (Family Type and Size, Race, Work, Education, Children, ...)
- People at Specified Levels of Poverty (Age, Sex, Race, Hispanic, Education, Citizenship, Work, Disability, ...)
- Children Characteristics (Poverty, Public Assistance, Age, Race, School Enrollment, ...)

Census 2000

- Selected Economic Characteristics (Poverty, Children, Income, Employment, ...)
- Individual Poverty Status (Age, Sex, ...)

• Want more? Need help? Use [Guided Search](#) or visit [Census.gov's Quick Facts](#).



# Census Data

Versions of this table are available for the following years:

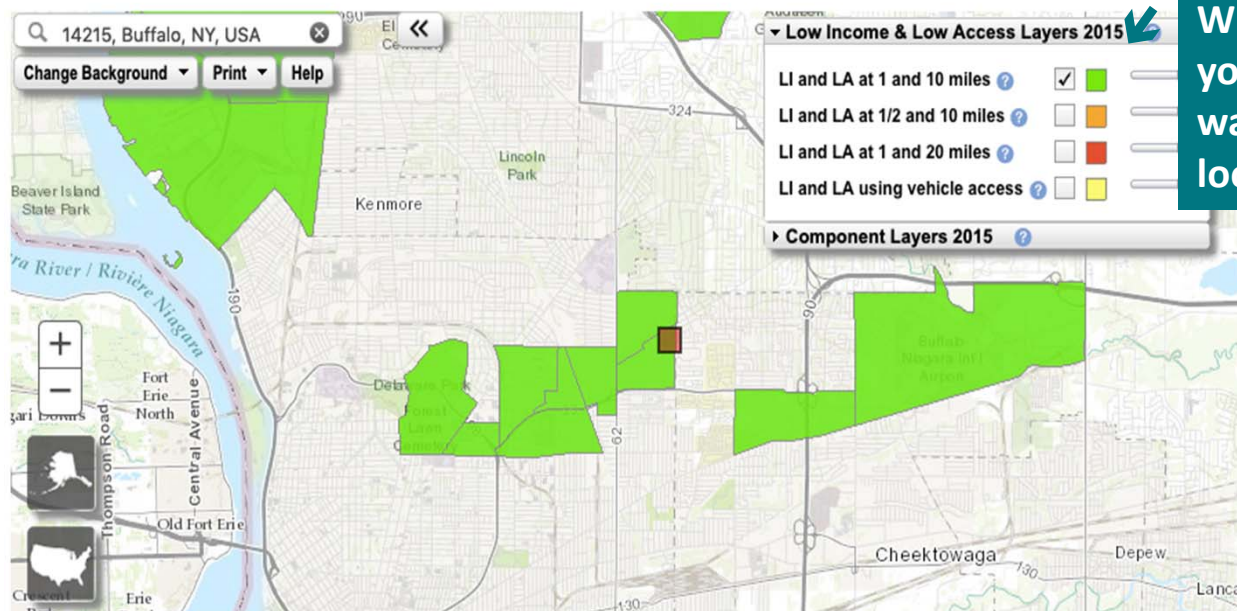
2017 ▸  
2016  
2015  
2014  
2013  
2012

	ZCTA5 14215							
	Total		In married-couple family household		In male householder, no wife present, family household		In female householder, no husband present, family household	
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error
DISABILITY STATUS								
Civilian children	6,566	+/-771						
With any disability	4.8%	+/-1.7						
SCHOOL ENROLLMENT								
Children 3 to 17	5,536	+/-671						
Enrolled in school	5,071	+/-640						
Public	92.7%	+/-2.9						
Private	7.3%	+/-2.9						
Not enrolled	465	+/-175						
MEDIAN FAMILY INCOME, INFLATION-ADJUSTED								
CHILDREN								
Median income	19,265	+/-4,262						
Children under 18 years in households	10,045	+/-717	2,862	+/-558	589	+/-267	6,566	+/-771
<b>PUBLIC ASSISTANCE IN THE PAST 12 MONTHS</b>								
Children living in households with Supplemental Security Income (SSI), cash public assistance income, or Food Stamp/SNAP benefits	65.2%	+/-4.4	43.4%	+/-12.0	50.9%	+/-21.8	76.3%	+/-4.6
<b>POVERTY STATUS IN THE PAST 12 MONTHS</b>								
Children in households for whom poverty status is determined	9,936	+/-706	2,784	+/-543	589	+/-267	6,535	+/-754
Income in the past 12 months below poverty level	42.4%	+/-6.0	11.8%	+/-6.2	29.0%	+/-18.3	56.4%	+/-6.8
Income in the past 12 months at or above poverty level	57.6%	+/-6.0	88.2%	+/-6.2	71.0%	+/-18.3	43.6%	+/-6.8
<b>HOUSING TENURE</b>								
Children under 18 years in occupied housing units	10,045	+/-717	2,862	+/-558	589	+/-267	6,566	+/-771
In owner-occupied housing units	31.1%	+/-4.9	65.0%	+/-11.1	36.2%	+/-21.2	16.1%	+/-4.0
In renter-occupied housing units	68.9%	+/-4.9	35.0%	+/-11.1	63.8%	+/-21.2	83.9%	+/-4.0

65.2% of children under 18 in this zip code were living in households with Supplemental Security Income (SSI), cash public assistance income, or Food Stamp/SNAP benefits



# Food Access Research Atlas



What do  
you  
want to  
look at?

<https://www.ers.usda.gov/data-products/food-access-research-atlas/>

<https://www.ers.usda.gov/data-products/food-environment-atlas/>



## Talking to Your Stakeholders

- Feedback, perspectives, and experiences of participants and partners
  - Where do you think we could recruit participants?
  - What would be the best way to recruit participants?



# Strategic Planning

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2. **Define your goals and objectives**
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# Chat In!

- Who do you have conduct outreach activities now?



# Staff Roles

- Who could you leverage for:
  - Direct outreach to participants
  - Indirect outreach to organizations
  - Tracking and monitoring





# Outreach Methods

- Direct
  - Word of mouth
  - Tell a friend campaign
- In-Direct
  - Partner with providers
  - Reach out to schools and Head Start
  - Approach businesses with low income workers



## Word of Mouth is Golden

- Happy participants will pass it on:
  - “The staff really care about me and my children.”
  - “My WIC office has been a life saver!”
  - “I will never forget how they helped me breastfeed successfully.”
  - “My WIC nutritionist gets me.”



# “Tell a Friend” Campaign



- Provide participants incentives for referring family and friends to the LA
  - Children’s books
  - Cooking gadgets
  - Cookbooks
  - Various prizes



# Chat In!

## In-Direct Methods

- Who do you currently partner with?
- Who are you interested in partnering with?



# Partner with Pediatricians

What can you do to make their job easier?

- Provide forms
- Provide breastfeeding support for their patients
- Help them understand more about formulas WIC provides
- Take good care of their patients



# Partner with OB/GYNs



- Promote WIC and the success in working toward healthier birth outcomes
- Support their patients in helping with healthy weight gain recommendations
- It is OK to brag about the great work you do for their patients



# Reach out to Schools

- Ask to make a presentation to the PTA
- Partner with parent liaisons
- Provide tabling of WIC forms and outreach materials (drop off and pick up)



# Reach out to Head Start

Offer parent workshops with topics important to them:

- How to handle picky eaters
- Healthy snacks that kids will love
- Including kids in meal preparation
- Making family meals happy times





## Businesses with Low Income Workers

- Work with human resources to advocate for their employees
- Provide WIC Income Guidelines, Application Packets
- Ask to Post Flyers
  - “Ready, Set, Grow...With WIC”
  - Contact Information/Operation Hours



# Strategic Planning

1. Conduct an assessment
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5. **Implement and evaluate**



# Implement

- Write your plan up
  - **Who** is responsible
  - For **what** activities
  - **Where**
  - By **when**
- Share it with staff



# Evaluate

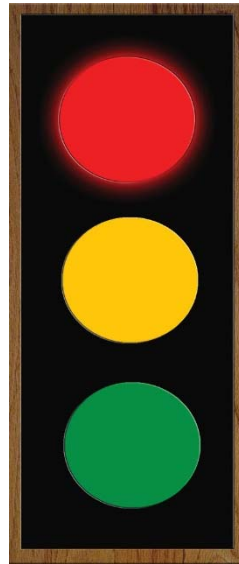
- How can you track your internal progress?
- How will you know if your plan is working?
- Is there a way to get participant or provider feedback?
- How can you share results and get feedback from staff?



# RED LIGHT GREEN LIGHT

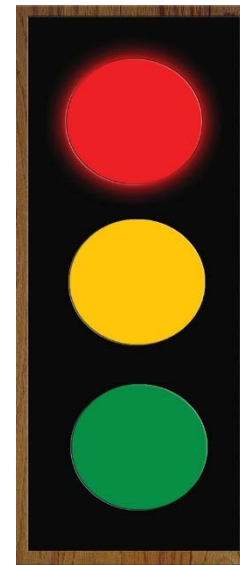


# Let's play a game!



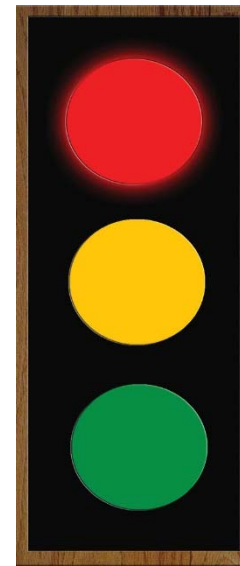
# What do you think?

- You organize a breakfast meeting with every home visitor in your community to promote WIC



# What do you think?

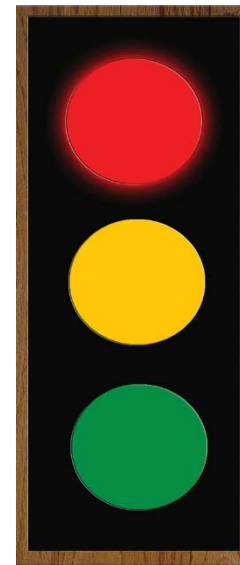
- Your agency sets up a table at a Community Health Fair focused on Wellness





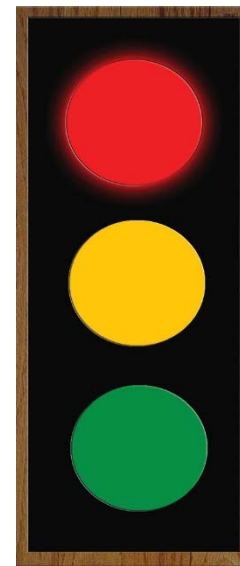
# What do you think?

- You work closely with three churches in your targeted zip code to advertise WIC in their church bulletins



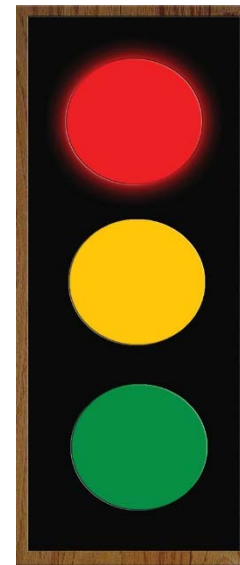
# What do you think?

- You create a Memorandum of Understanding with your local Head Start Program to have an active referral process



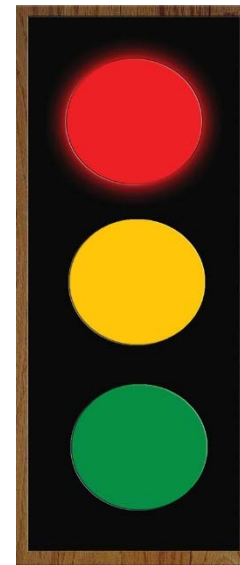
# What do you think?

- Your Breastfeeding Coordinator visits every OB/GYN practice and pre-natal clinic in your community to promote WIC and increase referrals



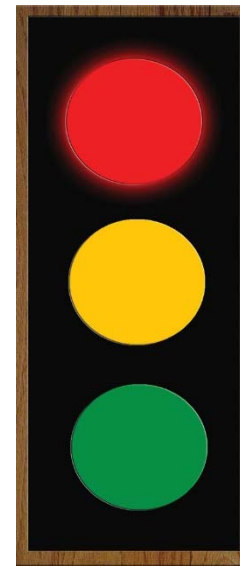
# What do you think?

- Your agency leadership meets with managers from other community based organizations to enhance WIC referrals



# What do you think?

- Your staff does outreach at a community music festival



# Green/Yellow/Red Light

- Rate and discuss the strength of various outreach approaches
- Engage staff and hear opinions, perspectives that you hadn't before
- Brainstorm new ideas for outreach



**Thanks!**





## **Building Caseload Through Strategic Outreach: Using Data, Leveraging Staff, and Finding Partnerships**

***Presented by: Michelle Gerka and Meredith Jones, CAI***

3/21/2019 - 165 attendees

### **Slide 8 – Chat In!**

#### **What is going well and what is challenging at your Local Agency/in your state regarding outreach and managing caseloads?**

- Small agencies have few staff to handle outreach etc
- Transportation is a huge challenge
- Time for this activity. Not provided extra funding for someone to do outreach.
- Text messaging going well. Retaining members and seeing dramatic decreases in participants staying on the program
- Macon County has started to go out into the community and sign people up remotely
- Partnerships are going well.
- public health detailing is going well. Our biggest challenge is reaching newly pregnant women.
- Online classes work very well for us in Forsyth County NC, challenges: Immigrant population
- Staffing and time are challenging
- Going well: Partnering with University and an InStore project.
- I think for our clinic, we are calling the no shows
- Staffing
- We are a smaller agency and are not a high priority for targeted outreach from state agency.
- Difficulty maintaining participants past age 1
- Retention
- Only one staff to handle outreach but no time set aside for outreach
- My county is fairly large and very rural. We are having trouble reaching all the potential participants as cell coverage and public transportation are challenging for them
- its hard to be out off the office for outreach and in the office seeing clients at the same time
- challenge: Hard to keep participants continue coming to appts
- Going well: Setting up tables to make appointments in OB offices, Not going well: People not showing up to their appointments
- WIC Services in Wheels in our region is going well
- Children after 1 year old drop off
- Working with Hunger Solutions has been a blessing!! Our Outreach person is able to be in places that we can't be due to clinic.
- Services on Wheels
- For our clinic, we are calling the no shows & getting them back in for an appt.
- Community partners are happy to have us come talk about WIC, but then we don't see any more referrals from them
- Returning participants is a challenge,
- more community partners are requesting our presence at their events to increase our exposure but our caseload continues to drop - many staff retiring, clients afraid of public charge....
- Macon County is doing pictures with the Easter Bunny and signing up new families for WIC





- Oops the Hunger Solutions Outreach person has been able to be in places our LA Outreach Coordinator can't be
- Challenges: Funding, staffing, time and reducing service delivery time to 5-10 minutes that is not realistic for the processes required.
- Time, adequate staff on site to conduct outreach
- We have been attending the kids safety fairs, community baby showers, CPA's going to the area medical providers.
- Not allowed to use social media
- We have noticed our caseload is very low. One staff person does outreach.
- We do lots of outreach but still see a decrease in caseload
- I'm completely new - teaching myself? Time away from clinic is a barrier. Small staff of very creative women.
- challenging to get face-to-face time with pediatricians
- Medical providers/Office managers do not want to speak with WIC
- Attending health fairs, baby showers, PTA meetings and in the immigration population are calling to drop out and sharing the information with others in the community. and they do not want to apply.

### **Slide 23 – Chat In!**

#### **Who do you have conduct outreach activities now?**

- Director and nutritionists primarily
- Nutritionist
- One QN
- Health Educator
- frontline staff, program staff, WIC supervisors
- 1 nutritionist
- CPA's & WIC Tech
- the outreach Coordinator
- Outreach Coordinator
- All staff: nutritionists, clerks, peer counselors
- all staff
- all staff
- Community Coordinator
- QN's
- Outreach Coordinator
- Child & Teen checkup staff
- Management Support
- I am only
- Public Health Specialist and Breastfeeding Peer Counselor
- Outreach Coordinator, Breastfeeding Supervisor, QNs
- Outreach Coordinator who is a dedicated position who handles all outreach
- everyone- nutritionist and support staff.



- Clerical staff
- Nutrition Educator
- WIC Director, outreach specialist (temp), members of management team
- primary nutritionist
- BF Coordinator, and Nutritionist
- Nutrition interns
- Outreach Coordinator with assistance from clinic staff at health fairs
- all staff
- WIC Director
- Outreach Supervisor, Breastfeeding Supervisor, Nutritionists
- Managers, RD's, Supervisors, Educators
- Processing assistant
- All staff
- I am a QN and the Public Health Detailing Outreach Coordinator
- WIC Director
- state staff
- All staff help with health fairs.
- all of our staff are required to attend an outreach event per fiscal year
- WIC Coordinators, Breastfeeding Coordinators
- all staff are assigned certain partners but mainly project nutritionist and front line staff.
- we used to use front line staff, but due to decreased staffing we can't use them since we need them to see clients
- CPA's and Support Staff and Director-really everyone except BFPC's
- we encourage all staff to help with outreach ie CPA, clerk, WIC Directors ie
- All staff
- Health Dept program staff
- BFPC
- Outreach Coordinator
- Nutritionist is coordinator, Processing Assistant supports
- With various community agencies: high pregnancy, substance abuse facilities

## **Slide 28 – Chat In!**

### **In-Direct Methods**

- **Who do you currently partner with?**
- **Who are you interested in partnering with?**
  - Head Start
  - Head Start
  - We have tried the employers with large numbers of low income women. They will not allow WIC because they think it will send a message to the community the employer doesn't pay enough
  - We partner with our libraries and storytime programs



- Want to reach out the the Medicaid system (Food Share) and Foster Care.
- Interested in partnering with churches
- Churches
- Community Employers
- Churches in the community,
- Pregnancy support centers
- currently :Daycares, Head start, schools, doctors offices, DSS, other WIC departments, grocery store
- local hospitals
- College in area, manufacturing business
- Snap, health insurance, nurse partnership, clinics, fostercare
- SNAP
- Farmer's Markets
- Dollar Store, Walmarts
- Community College students, grandparent caregivers
- Chamber of commerce
- Daycares
- YMCA, Head Start, Sheletring Arms, Fpster agencies, day care centers
- Schools with pre-K programs
- crisis pregnancy centers
- Medicaid/ SNAP
- OBs and Pediatrists
- Migrant councils
- Daycare providers
- Daycare Churches
- pta
- Environmental health-restaurant workers
- planned parenthood
- thrift stores
- hospitals now that we can provide services remotely
- homeless shelters
- SUPERMARKETS
- summer meals sponsors and sites



## Red Light, Green Light, Yellow Light Game

### 1. You organize a breakfast meeting with every home visitor in your community to promote WIC

**Green:** 6

**Yellow:** 18

**Red:** 11

Additional Comments:

- no funds for foods
- I would include their supervisors and or directors of the programs
- NOT COST EFFECTIVE
- we don't have enough funds to support this

### 2. Your agency sets up a table at a Community Health Fair focused on Wellness

**Green:** 20

**Yellow:** 13

**Red:** 18

Additional Comments:

- yellow - for networking w other CBOs
- we do these, but it is probably red
- could be green if the attendees are the demographic we are looking for.
- we have tried this, it didn't work
- *Note from presenters:* This can be a waste of time for getting new participants as potential participants don't generally attend wellness fairs. This can be good for developing relationships with other CBOs.

### 3. You work closely with three churches in your targeted zip code to advertise WIC in their church bulletins

**Green:** 40

**Yellow:** 5

**Red:** 2

Additional Comments:

- green bc we are close with our community faith centers. most of our clinics are held at churches
- HEALTHY SUNDAYS IN MY AREA



**4. You create a Memorandum of Understanding with your local Head Start Program to have an active referral process**

**Green: 33**

**Yellow: 5**

**Red: 3**

Additional Comments:

- Red - not allowed by agency

**5. Your Breastfeeding Coordinator visits every OB/GYN practice and pre-natal clinic in your community to promote WIC and increase referrals**

**Green: 31**

**(Yellow/Green: 1)**

**Yellow: 12**

**Red: 2**

Additional Comments:

- Red. Outreach coordinator visits clinics
- green. however in our agency it would be me
- *Note from presenters:* Start with those that serve a Medicaid population and immigrants and refugees. When you visit, also thank these groups for their work.

**6. Your agency leadership meets with managers from other community based organizations to enhance WIC referrals**

**Green: 32**

**Yellow: 4**

**Red: 0**

Additional Comments:

- yellow to organize
- ALREADY BEING DONE



National WIC  
Association

## 7. Your staff does outreach at a community music festival

**Green: 5**

**Yellow: 11**

**(Yellow/Red: 1)**

**Red: 28**

Additional Comments:

- green. we know our demographic attends the music in the park in our area
- we do a fun activity related to music and movement
- Tshirts (giveaways)
- *Note from presenter:* This can be complicated. How do you set up? How do you identify potential participants? What do you say? Have a table? Person to person? Giveaways?