Improving participant retention using benefit redemption data

PHFE WIC PROGRAM
CALIFORNIA WIC
MIKE WHALEY

EBT CONFERENCE 2017
Outline

We have a lot of WIC Data... can statistics help us determine WIC retention problems?

Collect data, including benefit usage

Build statistical models

Anything show up that can help keep families on WIC?
Built statistical model

Combine WIC MIS data (6 months before recert)

**Issued benefits + data on benefit spending**

Online education usage

Messaging system usage

Demographics – income, languages, SNAP, Medi-Cal

1\textsuperscript{st} model – 9,681 infants needing re-cert over 3 month period
Benefits data

Benefits issued

Unspent benefits

Separated out cash value vouchers

We can only see things at the voucher level
  ◦ Can’t see underspent vouchers easily
  ◦ Little idea exactly what they are missing
Online Ed data

30,000 families / month take online education @ PHFE

74% take the education on mobile devices

We think it reduces the squeeze for the juice
Text Messaging data

We send/receive 500,000 text messages per month.

81% of our families are signed up to communicate with us through text messaging.

We have canned scheduled automated messaging

Targeted template messages clinic staff can send during conversations -- sitting with participant!

Completely freeform interactive text messaging. (chat room)

We support a texting call center with different subject queues.

We think it reduces the squeeze for the juice
Goal for model

Determine if we can determine who will drop off AND WHY

Once we know... we can design interventions to improve our retention
Model
Breastfeeding Infant Example

- Fully breastfeeding
- Vietnamese language
- Planned to breastfeed
- 6 months prenatal
- Income 120% of FPL
- 2 months of online edu
- 2 months interactive text
- Not missing benefit months
- Not alone on WIC
- On Medi-Cal
- Spending 75%+ of benefits
Model
Breastfeeding Infant Example

- Fully breastfeeding
- Vietnamese language
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97 out of 100 infants in these families will stay on WIC
Formula Feeding Infant

- Fully formula feeding
- English
- Did not plan to breastfeed
- *Never prenatal on WIC*
- Income 120% of FPL
- No online edu
- No interactive text
- *Has missed benefits*
- Alone on WIC
- On Medi-Cal
- *Not spending 75%+ of received benefits*
Formula Feeding Infant

- Fully formula feeding
- English
- Did not plan to breastfeed
- Never prenatal on WIC
- Income 120% of FPL
- No online edu
- No interactive text
- Has missing appointments
- Alone on WIC
- On Medi-Cal
- Not spending 75%+ of benefits

16 out of 100 infants in these families will stay on WIC

84% leave
Now we can predict which families are most likely to leave WIC.

And have clues why.
What can we do?

Which parts of the model are things we can do something about?

<table>
<thead>
<tr>
<th>Formula or breastfeeding?</th>
<th>value of WIC benefits</th>
<th>Who else is on WIC</th>
<th>Prenatal plans to breastfeed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doing online education?</td>
<td>Doing interactive texting?</td>
<td>Missing WIC appointments?</td>
<td>Months prenatal on WIC?</td>
</tr>
<tr>
<td>Language preferred</td>
<td>Income level</td>
<td>Redeeming Vouchers?</td>
<td>On Medicare?</td>
</tr>
</tbody>
</table>
Clinic monitoring system

Families currently in each WIC Clinic

Waiting families
Retention specific information front and center
Talking Points

Red/Orange Box
Conversation Starters to assess PACE risks

**Alert:** We may be losing this INFANT. Have a conversation with the participant to keep them on the WIC Program!

**Alert:** We may be losing this CHILD. Have a conversation with the participant to keep them on the WIC Program!

**Risk: Formula (Infant)**
- “I see that (infant’s name) is (age) months old and will be going off formula in the next few months. Did you know that (infant’s name) will receive whole milk once he/she turns 1?”
- “May I show you all the foods he will be getting in addition to the great help that WIC will give you as he/she grows up?”

**Risk: No Online Ed (Infant/Child)**
- “I noticed that you chose to take your class in the center today. That is great. How was the class?”
- “How would you like to receive your education today, in a classroom or online?”
- “I see that you haven’t tried taking our online class. Would you be interested in taking classes online?”
- “What are your thoughts about taking our nutrition education classes online?”

**Risk: No Interactive Text (Infant/Child)**
- “I see that you are not signed up to receive text message alerts from WIC. Would you like me to help you sign up for the texting system?”
- “Did you know that you can ask WIC questions through text messages?”
- “Did you know you that when you reply to us, a live person will answer you?”

**Risk: Missed Appointments (Infant/Child)**
- “I noticed that you have missed a few of your WIC appointments...”
- “How can we help you keep your next WIC appointment?”
- “How can we help you receive your WIC checks at your next appointment?”
- “How was your last shopping experience?”

**Risk: Unused Fl’s (Infant/Child)**
- “How was your last shopping experience?”
- “What questions do you have about using your WIC checks?”
- “I see in your file you have not cashed some of your checks over the past several months. How can I help?”

**Risk: Unused Fl’s (Infant/Child)**
Retention

Spending the vouchers is a problem for WIC families.

Getting each family optimal benefits for their situation.
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