

# MORE WIC!

Matching, Outreach, Referrals  
for Enrollment in WIC

## Round 1 Request for Proposals (RFP)

**Date of release:** Wednesday, August 14, 2024

**Submission deadline:** Tuesday, October 15, 2024, 11:59 EDT

**Webinar #1:** Wednesday, August 21<sup>st</sup>, 3:00 pm EDT: Overview of project, funding, contracts

**Webinar #2:** Tuesday, August 27<sup>th</sup>, 3:00 pm EDT: Data Sharing and Matching

**Webinar #3:** Thursday, August 29<sup>th</sup>, 3:00 pm EDT: Outreach and Streamlined Enrollment

**Webinar #4:** Wednesday, September 4<sup>th</sup>, 3:00 pm EDT: Implementation and Evaluation Plans and Reporting

**Website:** [MORE WIC!](#)

**Email:** [morewic@jhu.edu](mailto:morewic@jhu.edu)

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## THE MORE WIC! PROJECT

The Matching, Outreach, Referrals for Enrollment in WIC (MORE WIC!) project is a cooperative agreement with the USDA Food and Nutrition Service (FNS) led by the Johns Hopkins Bloomberg School of Public Health (BSPH) in collaboration with the National WIC Association (NWA). MORE WIC! is part of [USDA's broader plan to modernize](#), strengthen, and expand the reach of WIC to improve health outcomes for young children and their families.

MORE WIC! will support State agencies as they work to leverage data to increase participation in WIC (the Special Supplemental Nutrition Program for Women, Infants, and Children), to help eligible families afford healthy food, receive nutrition guidance and breastfeeding support, and facilitate referrals to medical and social services. Over a five-year period, MORE WIC! will assist WIC State agencies, including the District of Columbia, Indian Tribal Organizations (ITO) and US Territories (hereafter referred to collectively as State agencies), to implement a streamlined enrollment process by using information from Medicaid, SNAP, and other assistance programs to identify, refer, and reach out to WIC-eligible families. MORE WIC! will support individual State agencies for up to 30 months in the development of data sharing agreements, data matching processes, and outreach efforts through opportunities for funding, technical assistance (regardless of funding status), and evaluation support.

**The remainder of this Request for Proposals (RFP) provides a summary of the funding opportunity and instructions on how to apply. Technical assistance (TA) will also be available to State agencies that wish to engage in data matching but do not require or request funding—JHU will provide information on TA at a later date. To learn more about this subgrant opportunity, establish your needs, or discuss an application, please reach out to [morewic@jhu.edu](mailto:morewic@jhu.edu).**

### WIC Modernization and Closing the Enrollment Gap

FNS estimates that in 2021 (the most recent data available), about 12.1 million people in the United States were eligible to receive WIC benefits, yet only 6.2 million participated in WIC, for an overall program coverage of 51%.<sup>1</sup> Coverage varies by type of participant, estimated at 44% for pregnant women, 78% for infants, 77% postpartum non-breastfeeding women and 61% for breastfeeding women. Coverage for children declines with their age (64%, 44%, 41% and 25%, respectively, for children 1, 2, 3 and 4 years of age). There are disparities in coverage by race and ethnicity, highest coverage rates for Hispanic WIC-eligible individuals (58%) and lowest for non-Hispanic White WIC-eligible individuals (44%).<sup>1</sup> That coverage is less than 100% is referred to as the WIC enrollment gap, and implementing procedures to streamline enrollment to reduce these gaps is the focus of the MORE WIC! Program.

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<sup>1</sup> Kessler, C., Bryant, A., Munkacsy, K., & Farson Gray, K. (2023). National- and State level estimates of WIC eligibility and WIC program reach in 2021. U.S. Department of Agriculture Food and Nutrition Service. <https://fns-prod.azureedge.us/sites/default/files/resource-files/wic-eligibility-report-vol1-2021.pdf>

## Data Matching and Outreach

Data matching with appropriate referrals across federal programs like Medicaid and SNAP is one tested strategy for addressing WIC enrollment gaps and streamlining enrollment.

Data matching involves:

- Creating and executing (or amending) data sharing agreements (DSA) between WIC and agencies that administer SNAP, Medicaid, and other programs, as needed.
- Completing a data match to generate a list of WIC-eligible nonparticipants (individuals or families who are adjunctively eligible for WIC) for referrals, outreach, and enrollment.
- Developing a plan for refreshing the data match periodically (for example, monthly, quarterly).

In Spring 2023, USDA issued two policy memos that explicitly encourage data sharing and data matching practices: “[WIC Policy Memorandum #2023-5: Data Sharing to Improve Outreach and Streamline Certification in WIC](#)”<sup>2</sup> and “[WIC Policy Memorandum #2023-6: Streamlining Certification Documentation Guidance](#).”<sup>3</sup>

The MORE WIC! project builds on these memos and on evidence from recent projects that suggest that data matching, referrals, and outreach efforts can increase WIC awareness and enrollment. In projects conducted by four WIC State agencies (Colorado, Massachusetts, Montana, Virginia), data matches with SNAP, Medicaid, and other programs found that a substantial share of adjunctively eligible families were not enrolled in WIC, with cross-program enrollment gaps upwards of 40 percent and as high as 77 percent. Using a text message outreach strategy, the pilots found that close to 80 percent of the outreach texts sent to mobile numbers were successfully delivered across the four states, one in five outreach recipients engaged with text messages, and of those, one in three requested an appointment to enroll in WIC.<sup>4</sup> In two of the pilots, text-based outreach improved WIC certification rates (compared with a control group with no outreach) for segments of the population.<sup>5</sup> They concluded that additional outreach and engagement strategies are needed – an important finding that will be investigated through the MORE WIC! project. Three additional data sharing and outreach models were tested by State agencies (New Jersey, Kansas, and New Mexico) during the first cohort of the Coordinating SNAP and Nutrition Supports Grant Program.<sup>6</sup> The pilot in New Mexico, which involved an automated referral engine to share participant data from SNAP, Medicaid, and TANF, led to an 18% growth in WIC caseload between May 2022 and February 2023.<sup>7</sup>

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<sup>2</sup> <https://fns-prod.azureedge.us/sites/default/files/resource-files/WPM-2023-5-DataSharing.pdf>

<sup>3</sup> <https://fns-prod.azureedge.us/sites/default/files/resource-files/wic-policy-memo-2023-6.pdf>

<sup>4</sup> <https://www.cbpp.org/research/food-assistance/using-data-matching-and-targeted-outreach-to-enroll-families-with-young>

<sup>5</sup> <https://www.cbpp.org/research/food-assistance/matching-data-across-benefit-programs-can-increase-wic-enrollment>

<sup>6</sup> <https://files.constantcontact.com/391325ca001/c7b77344-3411-4853-be2f-8b868f5e73a5.pdf>

<sup>7</sup> <https://files.constantcontact.com/391325ca001/936650e0-4fe5-4c16-8125-ce105d95f8c0.pdf>

## MORE WIC! Focus

Through this RFP, MORE WIC! solicits subgrant proposals from State agencies that want to increase equitable access to the program by identifying people who are adjunctively eligible for WIC services but not currently enrolled, conducting data matching, referral, and outreach efforts, and learning about the impact of their efforts on enrollment and participation.

**MORE WIC! will support selected State agency subgrantees through funding and technical assistance (TA) in any and all steps along the data matching and outreach process, from the creation of a DSA to the implementation of a data matching plan, as well as in the design, execution, and evaluation of an outreach strategy and dissemination of findings.**

We intend to fund 10 or more subgrant projects (with a maximum award of \$400,000 per project) identified through a competitive process. The project period of performance will be up to 30 months from award, which will include planning, implementation, and advancement of data sharing, matching, and outreach as well as evaluation.

**To provide equitable access to MORE WIC! subgrant opportunities for State agencies of varying sizes, staff capacities, and levels of experience with data matching, the MORE WIC! team will offer in-depth support during the application process (pre-award TA).** TA during the application process will include 4 webinars, multiple Q&A sessions and 1:1 office hours. These are offered to assist in the crafting of initial plans for each component of the project for your application. Please refer to the section on Technical Assistance for more information. Individual appointments can be made through the [MORE WIC! website](#) or by emailing [morewic@jhu.edu](mailto:morewic@jhu.edu) to request a meeting.

MORE WIC! welcomes proposals from State agencies with varying levels of experience with data sharing, data matching, and outreach. Some State agencies have never conducted a data match and may not have a DSA with SNAP and/or Medicaid agencies in place, whereas others have done so for several years. MORE WIC! will support the advancement of State agencies across the spectrum of experience through individualized TA and peer learning opportunities. We anticipate three categories of State agencies participating in MORE WIC! as shown in Table 1. In your application, you will be asked which of these three categories aligns with your experience and goals for the project.

Table 1. State agency experience with data sharing, referrals, matching, and outreach.

Learner	Doer	Leader
<p>State agency at the <b>outset</b>.</p> <ul style="list-style-type: none"> <li>✓ No DSAs in process</li> <li>✓ Limited or no prior data matching and referrals experience</li> <li>✓ No targeted outreach planned with Medicaid or SNAP</li> </ul>	<p>State agency ready to <b>advance</b>.</p> <ul style="list-style-type: none"> <li>✓ DSAs in process or executed</li> <li>✓ Some data matching and referral capabilities</li> <li>✓ Targeted outreach with Medicaid or SNAP planned or tested</li> </ul>	<p>State agency ready to <b>expand</b>.</p> <ul style="list-style-type: none"> <li>✓ DSAs executed</li> <li>✓ Sophisticated data matching and referral capabilities</li> <li>✓ Innovative ideas for data sharing, use of technology, and/or outreach strategies</li> </ul>

### Key project components

With the support of FNS and the project team, subgrant-funded projects will plan for up to **5 key activities** (some State agencies may have completed some steps at the time of application):

- 1) Establish or modify a DSA (or similar memorandum of understanding) with your State SNAP and/or Medicaid office (if not already in place).
- 2) Create the process and procedures for repeated referral data matching to identify those enrolled in Medicaid and/or SNAP, but not WIC, so they can be referred directly into WIC.
- 3) Plan and conduct outreach efforts that will ensure those individuals identified through the data matching process will be connected to WIC.
- 4) Create an advisory council to advise on culturally appropriate outreach strategies related to the focus of your project.
- 5) Craft an evaluation plan and collect data for measuring the key performance indicators (KPI) and outcomes of the project.

MORE WIC! aims to improve equitable access to WIC services, and thus, prioritizing equity is a focus of MORE WIC! Current WIC coverage estimates in each State agencies may indicate areas or population groups to focus on to improve equitable access to WIC (for example, pregnant individuals, rural living, families with primary language other than English). This may look different for each applicant depending on their WIC-eligible populations, and State agencies should identify in what ways they seek to improve equitable access through this project.

MORE WIC! will provide TA on each of these activities to all potential applicants during the pre-award phase.

### Training and Technical Assistance from MORE WIC!

The MORE WIC! team intends to provide substantial TA to:

- State agencies in the preparation of their applications in response to this RFP (pre-award TA);
- Subgrantees during the execution of their projects (post-award TA); and

- State agencies with other funding who seek TA only (i.e., State agencies not requesting funding). More information to be announced later.

**This section will describe pre-award and post-award TA. To learn more about the project, establish your needs, request TA, or discuss submitting an application, please reach out to [morewic@jhu.edu](mailto:morewic@jhu.edu).**

### Proposal-Writing Technical Assistance for Applicants responding to RFP

MORE WIC! will provide technical assistance to reduce barriers to applying for this funding. Pre-award TA is optional, but all interested State agencies are strongly encouraged to engage in these activities to build a strong application and project plan. To that end, as shown in Table 2, we will conduct webinars, hold Q&A sessions on components of the application, and offer the opportunity for 1:1 advice and support to applicants. We will post any updates to the [project website](#), which will serve as a hub for project information, training, and TA or resource materials. State agencies should send an email to [morewic@jhu.edu](mailto:morewic@jhu.edu) to express interest in applying for funding and TA and to arrange for 1:1 assistance.

Table 2. Pre-award Proposal Writing and Technical Assistance Opportunities

Date	Training/TA Opportunity	Description
Aug 21	Webinar #1: RFP	Live webinar providing an overview of the project, grantee expectations, and application requirements; recording posted to project website
Aug 27	Webinar #2: Data Sharing and Matching	Live webinar providing information to assist potential applicants in designing their proposals by giving an overview of the technical considerations for data sharing and referral data matching; recording posted to project website.
Aug 29	Webinar #3: Outreach Choices Streamlined Enrollment	Live webinar providing information to assist potential applicants in designing their proposals by giving an overview of the technical considerations for targeted outreach and streamlined enrollment, including pilot testing; recording posted to project website.
Sept 4	Webinar #4: Implementation and Evaluation Plans and Reporting	Live webinar providing information to assist potential applicants in designing their proposals by giving an overview of the technical considerations for implementation, evaluation and data reporting; recording posted to project website.
Sept 11	Q&A: Goals/Objectives and Implementation Plan	Up to 1-hour live Q&A session to ask questions; may submit questions to be addressed on the call beforehand; session will be recorded and posted to the website
Sept 12	Q&A: Timeline and Budget	Up to 1-hour live Q&A session to ask questions; may submit questions to be addressed on the call beforehand; session will be recorded and posted to the website
Sept 13	Q&A: ITO-specific questions and concerns	Up to 1-hour live Q&A session to ask questions; may submit questions to be addressed on the call beforehand; session will be recorded and posted to the website

Sept 17	Q&A: Attachments	Up to 1-hour live Q&A session to ask questions; may submit questions to be addressed on the call beforehand; session will be recorded and posted to the website
Sept 19	Q&A: Evaluation Approach	Up to 1-hour live Q&A session to ask questions; may submit questions to be addressed on the call beforehand; session will be recorded and posted to the website
Sept 25	Open Q&A session	Up to 1-hour live Q&A session to ask questions; may submit questions to be addressed on the call beforehand; session will be recorded and posted to the website
Oct 2	Open Q&A session	Up to 1-hour live Q&A session to ask questions; may submit questions to be addressed on the call beforehand; session will be recorded and posted to the website
Oct 9	Open Q&A session	Up to 1-hour live Q&A session to ask questions; may submit questions to be addressed on the call beforehand; session will be recorded and posted to the website
TBD	1:1 meeting with MORE WIC! project staff for technical assistance	Email <a href="mailto:morewic@jhu.edu">morewic@jhu.edu</a> to schedule an appointment for individual technical assistance
TBD	FAQs	Prospective applicants can email questions <a href="mailto:morewic@jhu.edu">morewic@jhu.edu</a> and the MORE WIC! team will post answers to questions on the project website for all to see

### Technical assistance to subgrantees post-award

Our plan is to work in partnership with subgrantees throughout the execution of their projects. Shown in Table 3 are key expected roles over the project period.

Table 3. Key roles for MORE WIC! and Subgrantees over project period

	<b>MORE WIC! will:</b>	<b>Subgrantees will:</b>
<b>Implementation &amp; Evaluation Plans</b>	Provide training and technical assistance (TA) to develop and strengthen implementation and evaluation plans	Develop data matching and outreach implementation and evaluation plans for their State agency including developing or modifying a DSA, creating processes and procedures for data matching and referrals, and planning outreach
<b>Advisory Council</b>	Provide TA on building an advisory council	Build an advisory council
<b>Ongoing TA</b>	Provide opportunities for ongoing TA throughout project implementation period	Participate in monthly one-on-one TA calls with project staff and peer learning modules with other State agencies in the cohort
<b>Project Implementation</b>	Provide training and technical assistance on data matching process, outreach strategies and evaluation	Implement data matching and outreach strategies; work with MORE WIC to analyze own agency's process and outcome evaluation data
<b>KPI</b>	Receive KPI and other de-identified data from State agencies	Collect relevant KPI and other process and outcome evaluation data and send to MORE WIC!



<b>Evaluation/Data Analysis</b>	Provide training and technical assistance on interpreting data and sharing results  Collectively analyze evaluation data from each project and across all projects and share results	Interpret data and share results
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**What happens post-award?**

At the beginning of the project period, MORE WIC! will host a virtual kickoff meeting with all State agency subgrantees and FNS. Within the first 3 months of funding, the team will conduct in-person site visits with each subgrantee to engage with the State agencies and their Medicaid and/or SNAP counterparts more fully.

MORE WIC! uses a learning collaborative model that offers individualized attention to participating State agencies as well as opportunities to connect and learn alongside their peers. Technical assistance will involve the following components:

1. **Intake Assessment:** At the beginning of the project, MORE WIC! staff will meet one-on-one with each State agency to perform an intake assessment. This will involve a structured interview to gather information to better understand each subgrantee’s unique capabilities, project needs, and desired outcomes. The intake assessment will be used to design an individualized technical assistance plan in collaboration with each subgrantee.
2. **Individualized Technical Assistance:** MORE WIC! project staff will work one-on-one with State agencies to provide technical assistance (see examples below). We will hold monthly check-in calls and ad-hoc meetings as needed throughout the performance period.
3. **Peer Learning Modules:** MORE WIC! offers peer learning opportunities intended to connect State agencies with one another, share practical strategies for addressing common challenges, and build lasting relationships. Peer learning will be offered through a set of virtual technical assistance modules that each focus on a single topic. Subgrantees will be assigned to Peer Learning Modules based on their TA needs as determined in their individualized TA plan. Each module will feature a presentation by a subject matter expert, with time built in for discussion, collaborative work, and information sharing among subgrantees. The proposed topics are described in Table 4 below.

Table 4. Peer Learning Modules and Objectives

Peer Learning Module Topic	Learning Objective
<b>Data Sharing Agreements</b>	State agencies understand the process to establish or modify a DSA, the components of a DSA, and what specific types of information (data fields/data elements) they will need to include to enable outreach and evaluation.
<b>Obtaining Consent for Data Sharing</b>	State agencies understand relevant laws, federal guidance, and best practices on individual-level consent for the purposes of cross-program data sharing, can identify any existing processes for obtaining consent, and determine whether new processes may be needed.
<b>Obtaining Consent for Texting</b>	State agencies understand relevant laws and best practices for obtaining individual-level consent to conduct text message outreach. (Only for State agencies who will use texting as an outreach strategy).
<b>Participant and Community Engagement</b>	State agencies understand best practices for building their advisory council, effective ways to engage the advisory council, and have example structures they can draw from.
<b>Data Matching</b>	State agencies understand the process to match data across programs, including what resources are needed, what data elements they will use, and how to maintain ongoing data matching. State agencies will be able to outline their data matching process.
<b>Targeted Outreach Plan</b>	State agencies understand how to make key decisions on timing, language, modality, audience, and calls to action in their outreach efforts, and are familiar with best practices for crafting messages informed by behavioral science.
<b>Streamlining Certification Processes</b>	State agencies understand practical strategies to simplify the certification process for adjunctively eligible WIC applicants identified through a data match.
<b>Evaluation Plan</b>	State agencies understand how to collect KPI for process and outcome evaluation and how they will incorporate evaluation methods during the project.

Post-award, MORE WIC! will provide individualized TA to State agencies in developing, refining, and/or finalizing data sharing and referral data matching processes for the purpose of outreach, including:

- Establishing or amending cross-program legal DSA between WIC and SNAP and/or Medicaid agencies where needed.
- Developing or enhancing processes to conduct data matches and referrals on an ongoing basis (refreshing periodically) as a part of regular business operations.
- Analyzing the results of the data match to better understand enrollment gaps and opportunities to target outreach.

- Developing an outreach plan, including which methods of outreach will be used, how frequently outreach will be sent, staggering outreach to manage clinic volume, etc.
- Crafting outreach messages, incorporating best practices from behavioral science to design and test message content and improve participant engagement.
- Finalizing plans and processes for data collection for monitoring progress, milestones, and evaluation of the effectiveness of the approach for reducing the WIC enrollment gap.

At the start of project year 2, MORE WIC! will host an in-person meeting in Baltimore, Maryland at the Johns Hopkins Bloomberg School of Public Health. The convening will provide an opportunity for each subgrantee team to share key learnings and initial results, as the expectation is that by the end of year 1 subgrantees will (depending on where they started) have executed or amended DSA, begun referral data matches, developed outreach and evaluation plans, and may have conducted outreach pilots. The convening will offer an opportunity for subgrantees to connect around common challenges, discuss how they will track progress and iterate in year 2. Subgrantees who have not yet started data matching and referral can learn from the experiences reported by those conducting data matching and designing outreach strategies. **Subgrantees are strongly encouraged to attend in person or in person attendance is preferred for subgrantees, but virtual attendance will be an option if necessary. Applicants should plan to request travel funds in their proposed project budget.**

At the end of the period of performance, MORE WIC! will host a virtual final meeting with the subgrantees and FNS. This will provide an opportunity for cross-project learning and discussion of lessons learned regarding effectiveness, challenges, and best practices. Non-subgrantee State agencies receiving TA through MORE WIC! will also be invited attend.

#### Technical Assistance to State agencies not seeking MORE WIC! funding

Many State agencies may have funding through other mechanisms, such as WIC Modernization Grants<sup>8</sup>, to advance in data sharing, matching and referral to WIC. **TA will also be available to State agencies that wish to engage in data matching but do not require or request funding— JHU will provide information on TA at a later date.**

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<sup>8</sup> <https://www.fns.usda.gov/wic/modernization-grant-nofa>

## APPLICATION GUIDANCE

This section is designed to provide key information regarding the submission of an application in response to the RFP and the application process. Please refer to earlier sections of this document, the MORE WIC! Supplemental Resource Guide, and links to resources within this document to help with your applications. The MORE WIC! webinars, Q&A sessions and 1:1 help sessions are designed to support the development of the application.

### Eligibility

Eligible MORE WIC! applicants include the following: [current WIC State agencies, including Indian Tribal Organizations \(ITOs\) or U.S. Territory WIC Programs that administer the WIC Program](#).

Only one application per State agency will be considered. MORE WIC! will fund a State agency through only one MORE WIC! subgrant; funding cannot be received through multiple MORE WIC! subgrants.

### Key Application Dates

RFP Release Date: Wednesday, August 14, 2024

Registration for MORE WIC! Grants Submission Platform (see below): On or before Monday, October 14<sup>th</sup>, 2024, 11:59 pm EDT

Webinar #1 RFP: Wednesday, August 21<sup>st</sup>

Webinar #2: Data sharing and matching: Tuesday, August 27<sup>th</sup>

Webinar #3: Outreach strategies and evaluation: Thursday, August 29<sup>th</sup>

Webinar #4: Implementation and Evaluation Plans and Reporting: Wednesday, September 4<sup>th</sup>

Q&A Period: September 11<sup>th</sup> – October 9<sup>th</sup>, 2024

Applications Due: Tuesday, October 15<sup>th</sup>, 2024, 11:59 pm EDT

**Potential applicants must register for the Grants Submission Platform by sending a non-binding email communication to the MORE WIC! Project Manager, Michelle Estradé ([morewic@jhu.edu](mailto:morewic@jhu.edu)) and include the following:**

**Name, email address, and telephone number for the Project Director**

**Name of State Agency**

**Name and email of individual who will upload the application (if different)**

**By communicating with MORE WIC! prior to the deadline ([morewic@jhu.edu](mailto:morewic@jhu.edu)), we will create a unique electronic box for you to securely upload your application.**

### Sections of the Application

Applications responding to the RFP will include the following 10 components as well as supporting documents (e.g., attachments, letters of support). The 10 components are:

1) Title Page/Cover Sheet

- 2) Project Summary
- 3) State Agency Context
- 4) Project Goals and Objectives
- 5) Data Matching Plan
- 6) Outreach Strategies
- 7) Implementation Plan
- 8) Staffing
- 9) Budget and Justification
- 10) Timeline

Accompanying this RFP is a set of Application Templates. The Templates serve 2 purposes: 1) to provide page limits and additional details on key points to be included in each of the 10 sections; 2) to be used to craft the components of application. Subgrantees must complete their application using these and then upload each one separately to a secure site.

Key activities and dates during the project period are found in the section on budgeting and timeline.

Key information that will be included in each of the 10 sections is included below:

1. [Title Page/Cover Sheet](#)

2. [Project Summary](#)

Provide a 1-page (maximum) summary of sections 3-7 of the proposal narrative.

3. [State Agency Context](#)

This section should include a description of your State agency, including the following:

- a. Describe the landscape of your State agency in terms of the number of local agencies, the populations served, and important population or participant characteristics (e.g., race, ethnicity, urban/rural, languages spoken). Describe any historically and currently underserved populations with disparities in access to WIC and other maternal and child health resources. This brief text narrative should reflect appropriate understanding of the historical and systemic reasons for existing disparities.
- b. Describe the WIC coverage gaps your State agency is experiencing. Provide any data that substantiates the need for this project (examples include the State agency coverage data for pregnant individuals, infants, and/or children; the percent of WIC-eligible individuals who are enrolled in Medicaid and SNAP, but not on WIC). For this, it may be helpful to consult the recent report from the USDA.<sup>9</sup>
- c. Describe the barriers to equitable WIC access in your State agency.

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<sup>9</sup> Estimates of Nonparticipation Rates of Medicaid and SNAP Beneficiaries in the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC). A Report to Congress, February 2023. Available online at <https://www.fns.usda.gov/wic/report-congress-estimates-nonparticipation-rates>.

- d. Describe how the proposed project may impact equity.
- e. State whether your State agency is a Learner, Doer or a Leader with respect to data sharing and matching (refer to Table 2).

#### 4. Project Goals and Objectives

Applicants should identify appropriate goals and objectives for their project, by tailoring the following goals and objectives to their context and plans.

The goal of each project funded by MORE WIC! must be “to increase equitable access to WIC by leveraging existing data from SNAP and/or Medicaid to identify adjunctively eligible families not currently enrolled in WIC and conducting effective outreach to enroll them in WIC.”

Through project objectives, State agencies will communicate their project-specific objectives. The objectives should reflect the activities or key steps that are needed to achieve the goal and include formation of DSA; creation of the policies, systems, and environment (PSE) needed for routine data matching; creation of an advisory council to inform outreach strategies; testing of outreach strategies; implementation, monitoring, and evaluation. Objectives should:

- a. Be SMARTIE (specific, measurable, achievable, realistic, time-bound, inclusive, and equitable).
- b. Drive action and help you focus on achieving measurable results.
- c. Be linked to the State agency context, the WIC enrollment gap, and equity focus.

Applicants must tailor their objectives depending on whether they are a Learner, Doer, or Leader. Examples of objectives include, but are not limited to:

- Establish data sharing agreements across Medicaid, SNAP, and your State agency by the end of Year 1.
- Establish regular (monthly or quarterly) referral data matching and identification of those who are eligible but yet not enrolled for outreach by the start of Year 2.
- Create or work with the advisory council to identify locally appropriate outreach strategies to test in a pilot study during Year 2.
- Test one or more outreach strategies using [name strategy such as text messaging] to increase WIC enrollment in [name underserved population] in Year 2.
- Evaluate the impact of the data matching and outreach on WIC enrollment.

#### 5. Data Matching Plan

All funded subgrantees shall implement a referral data matching process and procedures to identify those individuals adjunctively eligible for WIC (via Medicaid and/or SNAP), but not participating in WIC, so they can be referred directly to WIC.

Subgrantees are required to establish referral partnerships with their State SNAP and/or Medicaid programs. An existing DSA is not required to apply for or secure funding.

In this section of the application, provide the following:

- a. Indicate the status of any DSA, or related documents that provide for data sharing across Medicaid, SNAP, and WIC. Describe your current relationships with State SNAP and/or Medicaid partners prior to the beginning of the sub-grant period.
- b. Describe an initial plan for advancing data sharing and matching, including the development of the specific policies and procedures needed to start and maintain routine data matching. If awarded, MORE WIC! will provide TA to refine your data matching plans.
- c. If you have conducted data matching with Medicaid or SNAP previously, describe lessons learned or challenges you faced.
- d. Applicants should describe barriers to implementation, and the type of TA to be sought from MORE WIC! The MORE WIC! team plans to conduct site visits and an intake assessment with each subgrantee to strengthen the proposed plan and identify areas for individualized TA.
- e. Identify your WIC Management Information System (MIS) and describe regular reporting routines and data safety protocols, and how data matching, reporting and outreach could be incorporated into the system.

Subgrantees must establish a system and collaborative environment so that they are able to obtain data matching implementation reports with the assistance of their Medicaid and SNAP State organizations in a timely manner. This may require the creation of new policies and/or procedures for data management and transfer that will enable the work to be accomplished. Initial plans for how this system could function should be included in the application. We encourage applicants to reach out to their collaborating agencies early in the application period and to identify a liaison at the State agency who will work with them on the project. Applicants must submit letters of commitment from SNAP and/or Medicaid agencies as part of the sub-grant application. Letters must be submitted with the Application templates through the electronic box.

Here are some key considerations when creating plans for data matching. However, applicants are not expected to have finalized plans addressing each of these considerations.

- Do you intend to conduct a data match with SNAP, Medicaid, or both? Why?
- Do you know where the data is housed and how you can access it, including whether you will need to work with vendors? If not, how will you find out?
- What specific pieces of information (data fields/data elements) do you believe you will need to identify WIC-eligible nonparticipants including any target populations for your project; conduct outreach to them; and complete an evaluation? Common examples include:

- Participant Information: First and last name, Date of birth
- Contact Information: Phone number, Mailing address, Email address
- Demographic Information: Race, Ethnicity, Age, Gender
- Program Identifiers: Medicaid program ID, SNAP program ID, other
- Preferred language (reading or speaking)
- Do you know if protocols are in place to share data securely (such as Secure File Transfer Protocols, or SFTP)? If not, how will you find out and ensure secure protocols are in place?
- Do you have an existing DSA that can be used for this project?
  - If not, you should plan to create one as part of your project.
  - If yes, does it allow all the information needed for your data match to be shared? Otherwise, the DSA will need to be amended as part of your project.

## 6. Outreach Strategies

USDA defines outreach as a way of conducting business to ensure that underserved individuals and groups are made aware of, understand, and have a working knowledge of USDA programs and services. Outreach will ensure that these programs and services are equitable and made accessible to all.

In this section of the application, State agencies must include the following:

- a) Description of the current landscape of outreach activities conducted by your State agency to increase participation and retention in WIC. If you have previously conducted outreach following data matching, describe lessons learned or challenges you faced.
- b) Presentation of an initial plan to develop or identify evidence-based, culturally competent outreach strategies to reach eligible nonparticipants identified through your data match with SNAP and/or Medicaid, and other programs. Provide a rationale for the proposed strategies from the checklist\*, any details regarding implementation that should be considered, and your need for TA with outreach activities.
- c) Description of an initial plan for an advisory council. Each subgrantee is expected to form or to engage with an advisory council as an equity-focused strategy for designing culturally appropriate outreach strategies and enhancing community engagement. Applicants should demonstrate how they plan to involve the input, feedback, and/or leadership of members of priority populations and individuals with lived experience in lack of access to WIC.
- d) Description of how your plan, the proposed strategies from the checklist, and the advisory council complement or build upon your current outreach strategies to increase enrollment through this project.

\*Outreach strategies are listed in a [Technology Tools for Outreach Checklist](#) provided at the end of this document and to be completed as Attachment 2 of the application.



MORE WIC! recognizes three overlapping strategies for outreach. First, presented in Figure 1 are examples of evidence-based targeted outreach strategies that have been tested in prior research in WIC including the pilot work by Benefits Data Trust and the Center on Budget and Policy Priorities. Second, there are technology-enabled outreach strategies for enrollment, only some of which are shown in Figure 1. Effective outreach may involve changes to WIC State and local agency websites to facilitate enrollment. Third, untargeted outreach through social media platforms such as Facebook can be a key communication tool within specific communities, and a sustainable way to support targeted outreach for enrollment. In some communities, partnering with health care, home visiting, and community-based organizations can further encourage WIC enrollment. For this project, untargeted outreach should be considered a complementary strategy that should be combined with a targeted outreach approach.

Figure 1. Evidenced-based recommended outreach methods for MORE WIC!

- **Texting (manual/automated, one-way/two-way):** A variety of types of texting outreach can be used, including pre-programmed automated messages, manual messages that allow for greater personalization by WIC staff, two-way messages that include pre-programmed replies (e.g., “Reply 1 to receive a WIC call to get started; Reply 2 to learn more”) or simpler one-way messages.<sup>10</sup>
- **Texting chatbots:** A high-tech approach that enables interactive text conversations with automatic, personalized responses using machine learning.<sup>11</sup>
- **Outbound call campaigns:** A low-tech, labor intensive, but effective approach to reach eligible nonparticipants identified through data matching over the phone, enabling scheduling of certification appointments on-the-spot. Requires consistent, dedicated staff time.<sup>12</sup>

## 7. Implementation and Evaluation Plan

The MORE WIC! team will provide training and TA to funded State agencies on detailed project implementation and evaluation planning and work with them to finalize the design, methods, and tools for both a process and outcome evaluation for their project. Process evaluations determine whether project activities have been implemented as intended. Outcome evaluations determine whether the project has impacted the WIC enrollment gap and achieved or made progress towards its desired outcome of enrollment, participation, and equitable access to WIC services (reduced the enrollment gap of a prioritized underserved group). See the supplemental guidance document for additional information on timelines for implementation, specific evaluation components and KPIs.

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<sup>10</sup> <https://www.cbpp.org/research/food-assistance/targeted-text-message-outreach-can-increase-wic-enrollment-pilots-show>

<sup>11</sup> [https://wicworks.fns.usda.gov/sites/default/files/media/document/Texas\\_USDA\\_Final%20Report.pdf](https://wicworks.fns.usda.gov/sites/default/files/media/document/Texas_USDA_Final%20Report.pdf)

<sup>12</sup> <https://thewichub.org/new-hampshire-wic-targeted-outreach-to-snap-and-medicaid-recipients/>

In this section, the following must be described:

- a) Briefly describe an initial plan to implement the following project activities: 1) form DSA; 2) execute data matching; 3) test outreach strategies and expand outreach for enrollment; 4) form advisory council to inform outreach strategies.
- b) As each subgrantee will focus their efforts on reducing a specific enrollment gap, (specified in their Project Goal and Objectives), here applicants should propose KPI to evaluate the specific enrollment gap and/or equity focus of their proposed project. These KPI should assess the size of the specific enrollment gap and reduction in the gap (increase in coverage) in your chosen equity focus.
- c) When considering the implementation of outreach strategies, describe how you might test or compare specific outreach strategies for effectiveness. Here, applicants can propose additional data collection activities for this purpose, including user or A/B testing, pilot testing, focus groups or surveys. MORE WIC! will have an info session with information on testing outreach strategies and is available to provide 1:1 help sessions. Post-award, MORE WIC! will provide training and TA on developing and implementing additional data collection instruments if needed for implementation and/or evaluation.
- d) For the evaluation activity and to answer the key evaluation questions, subgrantees will provide MORE WIC! with de-identified a) summary data, or b) individual level data, according to a planned timetable (established with the subgrantee). Subgrantees must also report to MORE WIC! on project progress, challenges and lessons learned, as well as all policies and procedures that may change operations in the State agency and may impact WIC enrollment, participation, or KPI. In this section of the application, indicate that you acknowledge this requirement and identify any known barriers to sharing data files or progress reporting for the purpose of evaluation.
- e) Explain potential challenges related to evaluation, including data issues or concerns. If applicable, provide a brief description of the Institutional Review Board (IRB) process at your State agency.
- f) Applicants should indicate how they will be able to sustain the data matching and outreach activities after the project period and subgrant funding ends, and whether their approach is transferable to other WIC State agencies. For example, will you use open-source technology, or do you plan to develop systems that can easily be tailored and adapted by other State agencies?

## 8. Staffing

- a) Describe the structure of the team that will complete the proposed activities. Clearly describe the core responsibilities of key personnel and other partners and staff involved in the proposed project, including key personnel's reporting structure to the project director (e.g., administrative co-director, data analyst, behavioral scientist, liaison to local agencies, information technology team, etc.).
- b) Provide plans for hiring (where needed) and managing personnel associated with the project. Staffing plans should include someone whose job description includes

focusing on data matching and reporting to MORE WIC!

- c) Include personnel descriptions of no more than ½ page for technical personnel associated with the project. Describe any experience within the team with data matching, outreach, program evaluation.

## 9. Budget

Provide a budget using the Excel template (9a) provided in the Application Template and complete a budget justification using the Word template (9b) which also contains instructions. Budgets may include expenses related to personnel, supplies, equipment, travel for in-person meetings, and other direct costs. Costs for MIS upgrades that will overcome barriers to implementing data matching, outreach and evaluation are allowed but all [Handbook 901](#) processes must be followed before funds are expended. Include a budget justification which demonstrates the feasibility of the proposed budget.

MORE WIC! subgrantees must be willing to participate in various activities throughout the period of performance. These include: 1) attending an initial virtual kickoff meeting; 2) attending a convening (2 people and in-person if possible) to be held in Baltimore, Maryland at the end of Year 1/start of Year 2 of the project; 3) participating in monthly virtual TA meetings and activities; 4) attending a final reporting workshop to be held virtually with USDA/FNS and 5) completing quarterly progress and financial reports and a final report within two months of the end of the project funding period. Funded agencies will budget for and use project funding to support travel to the in-person convening.

## 10. Timeline

A timeline template is provided that indicates key project activities. Applicants should identify and include additional activities in the timeline for their project. The supplemental guide has additional information to help build a timeline.

## Key Round 1 Subgrantee Project Activities and Dates

Award Notification Date: November 13, 2024

Award Start Date: December 1, 2024

Period of Performance: Up to 30 months from start date

Virtual Kick-off Meeting with FNS: December 2024/January 2025 Date/time: TBD

In-person Training Workshop: December 2025/January 2026 Date/time: TBD

Virtual Final Reporting Meeting with FNS: June 2027, Date/time: TBD

## Review Process

A panel of approximately 5 external reviewers will be assembled to review and score each proposal with respect to the following selection criteria. Reviewers will be a group of professionals who have experience and expertise in WIC, program development, communication technology, and evaluation. They will be recruited from state and local public

health agencies, national organizations, academic institutions, and non-profit organizations. Projects will be ranked for funding by the MORE WIC! team based on a combination of reviewer scores and geographic and population diversity. Final funding decisions will be made by FNS.

## Review Criteria

All applications will be prescreened for completeness, eligibility, and relevance.

### *Screening Questions:*

Is the applicant a WIC State agency?

- Yes: proceed with review
- No: application is eliminated

Does the application contain all required components, including a letter of commitment from the SNAP and/or Medicaid State agency?

- Yes: proceed with review
- No: application is eliminated
- \*If the application is missing 1 document, the State agency will be notified, and they will have 3 business days to submit the missing document. Missing more than 1 required document is grounds for elimination.

Is the applicant able to meet all assurances demonstrated by checking all items on Attachment #1?

- Yes: proceed with review
- No: application is eliminated
- \*If the applicant is missing 1 assurance, follow up with them to discuss to see if it is grounds for elimination or if a work-around could be made

Does the applicant demonstrate the ability to report on progress and share de-identified summary data to MORE WIC!

- Yes: proceed with review
- No: application is eliminated

## Criteria for Application Completeness

The following 8 criteria will be used to judge application completeness:

- 1) A description of the applicant's State agency, including a description of their current Medicaid and/or SNAP data matching and outreach capabilities.
- 2) A letter of support from other leadership of the SNAP and/or Medicaid State agency(ies) with whom the WIC State agency intends conduct data matching;
- 3) Justification for the project, including any data that substantiates the need for this project (i.e., the percent of WIC-eligible individuals who are enrolled in Medicaid and SNAP, but not on WIC; the current coverage rate for WIC-eligible populations,);

- 4) A plan illustrating how the subgrantee will implement the project and their ability to collect data for the purpose evaluation as articulated in this RFP;
- 5) An itemized budget of intended costs to implement the project that clearly states allowed and unallowed expenses;
- 6) A plan for how subgrantee will meaningfully involve WIC beneficiaries or the advisory council in the design of the intervention and evaluation;
- 7) A description regarding the potential for sustainability of the innovation beyond the grant period;
- 8) A statement that the subgrantee is willing to dedicate the necessary resources for the duration of the project and work collaboratively with FNS and FNS-sponsored contractors on an as-needed basis to clarify work being accomplished and to participate in any surveys, interviews, or focus groups related to WIC outreach, innovation, and program modernization efforts.

Table 5. Application Scoring Criteria

Total Possible Point Value	Criteria	What are we looking for
20 points	State Agency Context, Goals and Objectives	<p>Clear description of the organization, client population and the problem as it relates to WIC enrollment gap; makes compelling case for target population selected, including using MIS and other data and local staff wisdom and/or steps taken to understand agency-specific enrollment issues.</p> <p>Discusses any other activities the agency is engaged in that could impact enrollment and activities are understood to be complementary or not conflicting with application approach</p> <p>Includes both process and outcome objectives; objectives are relevant; objectives are SMARTIE.</p> <p>Clearly describes their implementation and basic plan for evaluation and how it is a good fit for their State agency.</p> <p>Project is consistent with MORE WIC! goals.</p>
30 points	Data matching and outreach strategies	<p>Clear and compelling description of the data matching and outreach plan and how it will reach historically underserved populations.</p> <p>Describes how the advisory council will provide guidance, feedback, and lead to the creation of culturally relevant outreach strategies.</p> <p>Describes key partner engagement that will enhance the project relevant to data matching and to outreach; clearly describes plans for any proposed tool adaptation, pilot-testing of outreach strategies.</p> <p>If support is requested for MIS upgrades, the need for this support is justified as essential for successful data matching and outreach and is approved by FNS.</p>
30 points	Implementation Feasibility, including Implementation	<p>Describes how the data matching and outreach strategy will be implemented, including any steps such as training and rollout, resources, management, and oversight; demonstrates that the data matching and outreach strategy can be feasibly implemented by the State agency during the project period; describes key</p>

	<p>Plan, Budget &amp; Justification, Personnel, and Timeline</p>	<p>partner engagement that will contribute to the successful implementation of the project; has a reasonable plan for implementing or sustaining and tracking outreach activities throughout the project period; describes reasonable plan for sustaining the implementation of the data matching and outreach strategies beyond the project period.</p> <p>Staffing plan is adequate and appropriate for proposed activities, including someone whose job description includes focusing on data reporting to MORE WIC!. Personnel descriptions support staffing plan.</p> <p>Budget request is reasonable for the project and within scope; justification completed according to MORE WIC! instructions. If funds are requested for MIS upgrades, the costs are reasonable given the scope of the upgrade activity and given approval by FNS.</p> <p>Timeline is feasible for implementation and includes key project activities towards achieving project objectives.</p> <p>Overall, the project is likely to succeed.</p>
<p>20 points</p>	<p>Evaluation Approach</p>	<p>Demonstrates current capacity to collaborate with MORE WIC! on TA and evaluation activities; demonstrates current capacity to collect and submit data or provides a clear description of capacity-building activities to build capacity to collect and analyze data during the project period; describes any key partner engagement that will contribute to the success of the project.</p> <p>Describes any current data issues or concerns, and how they will maintain data quality and integrity of all data and analysis; provides a description of how MORE WIC! will support their evaluation activities.</p>

## Attachment #1: Assurances

- *Review and confirm your ability to meet the following assurances*
- *Initial by each one*

\_\_\_\_\_ My State agency will use funds to implement a data matching plan and outreach strategy that will close the gap between those enrolled in Medicaid and SNAP and eligible for WIC services but not enrolled WIC.

\_\_\_\_\_ My State agency has the capacity and is authorized to rectify any problems related to contracting and wiring funds.

\_\_\_\_\_ My State agency will participate in technical assistance activities including monthly TA calls, periodic peer learning modules, and the virtual and in-person convenings.

\_\_\_\_\_ My State agency has staff capacity for this project.

\_\_\_\_\_ My State agency has confirmed with the responsible financial officer and other members of the state administration (e.g., IT department) that it is authorized to enter a contractual relationship with MORE WIC! and can sign a contract with Johns Hopkins University for this purpose.

\_\_\_\_\_ My State agency will document and utilize procedures and protocols to ensure the privacy and safety of WIC client information.

\_\_\_\_\_ My State agency will work with MORE WIC! team to secure Institutional Review Board (IRB) approval as needed to carry out evaluation-related data collection activities.

\_\_\_\_\_ My State agency will work with MORE WIC! team to finalize the plans for data matching and outreach strategies and evaluation; to implement our plan; to track the implementation process of data matching and outreach strategies; collaborate on the data collection and progress reporting to inform the evaluation and utilize evaluation measures to address the project research questions that apply to my project.

\_\_\_\_\_ My State agency has the capacity and has agreed to work with MORE WIC! to provide aggregate data from the WIC MIS, individual level de-identified MIS data and/or other relevant project related datasets for the purposes of project monitoring and evaluation and required to meet the evaluation needs of this project.

\_\_\_\_\_ My State agency is authorized to allow key personnel to attend webinars, ongoing virtual check-in meetings, conferences, and follow all reporting requirements, including quarterly and financial reporting.

\_\_\_\_\_ My State agency will dedicate the necessary resources for the duration of the project

and work collaboratively with FNS and FNS-sponsored contractors on an as-needed basis to clarify work being accomplished and to participate in any surveys, interviews, or focus groups related to WIC outreach, innovation, and program modernization efforts.



## Attachment #2: Technology Tools for Outreach Checklist

Technology tools are often used as part of a WIC State agency outreach strategy, such as social media platforms, online pre-application forms or online appointment scheduling. Below is a checklist of tools for outreach. Please check all that apply to your state agency's current outreach strategies. Please describe your State agency use of each tool, both current and planned, in outreach and how frequently it is employed.

Tool	Description	Comment
<input type="checkbox"/> WIC website	Web page produced by a WIC agency	
<input type="checkbox"/> Social media	Websites and applications (such as Facebook, Instagram, YouTube) that enable individuals to learn about WIC and to participate in social networking.	
<input type="checkbox"/> Online pre-application (eligibility form or interest form)	For WIC applicants to enter some basic information and receive a call from a member of WIC staff to start the certification process.	
<input type="checkbox"/> Chatbot	A high-tech approach that enables interactive text conversations with automatic, personalized responses using machine learning.	
<input type="checkbox"/> Texting (manual/automated, one-way/two-way)	A variety of types of texting outreach can be used, including pre-programmed automated messages, manual messages that allow for greater personalization by WIC staff, two-way messages that include pre-programmed replies (e.g., "Reply 1 to receive a WIC call to get started; Reply 2 to learn more") or simpler one-way messages.	
<input type="checkbox"/> Outbound call campaign	A low-tech, labor intensive, but effective approach to reach eligible nonparticipants identified through data matching over the phone, enabling scheduling of certification appointments on-the-spot. Requires consistent, dedicated staff time.	
<input type="checkbox"/> Integrated Benefits Application (Joint application or automatic MIS referral with call-back)	Involves development of joint applications with SNAP and/or Medicaid that include WIC as an option, or instead generating an automatic referral to the WIC MIS when a WIC-eligible individual applies for SNAP or Medicaid. With both strategies, data from the	

	application would automatically be routed to WIC for a local agency call-back to schedule a WIC certification appointment.	
<input type="checkbox"/> Appointment scheduling online	For WIC applicants to schedule a certification appointment using an online platform.	

## Letters of Commitment

- *At a minimum, a Letter of Commitment is required from the Medicaid and/or SNAP agency with whom you plan to work.*
- *Applicants may also include Letters of support from state IT department, community partnerships, or other state administration to demonstrate support for the proposal.*
- *A sample letter has been provided below.*

Date

Dear Dr. Caulfield,

I write on behalf of **[State Agency name]** in support of the USDA/Johns Hopkins MORE WIC! proposal. We strongly support their application and their data matching and outreach project, decrease barriers to access, and to comprehensively evaluate the impact of the outreach strategy.

As an organization [describe ongoing or past efforts working with State agency, involvement with the target community, and other previous partnerships with State agency].

In the event this proposal is funded, we would expect our role in the **[your project's name]** to include:

[State agency name] will take responsibility to lead the **[your project's name]** **[describe here the main activities of your project that you will be leading]** to reach the [target community].

We look forward to working with you to support cost-effective telehealth interventions in WIC, improve client outcomes, and increase client retention in the program.

Sincerely,

[Name of responsible person in partnering organization] [Title of responsible person in partnering organization] [Name of partnering organization]  
[Address of partnering organization if not in letterhead]

## Application Checklist

- Have you registered with the MORE WIC! subgrant submission platform?
- Does your Title Page/cover sheet include the title of the project, name of your agency, contact information: name, position, phone number, and email address?
- Is the proposal clearly stated?
- Does your proposal comply with the format requirements and the page limitations?
- Is Attachment 1: Assurances attached?
- Is Attachment 2: Outreach Strategy Checklist attached?
- Are descriptions of the key personnel attached?
- Is the MORE WIC! RFP Budget Form and Budget Justification attached? Is the budget narrative included and does it agree with the calculations shown on the budget form?
- Is your Project Timeline attached?
- Is a letter of Commitment from your State data matching agencies attached?