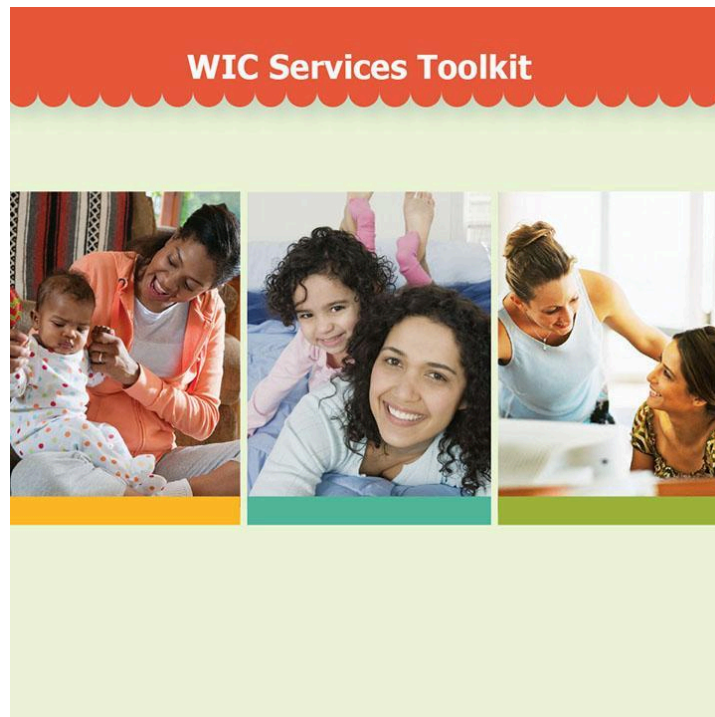



Iowa WIC Services Clinic Assessment Tools September 2021





**This assessment tool is a modified version of the Mid-Atlantic WIC Services Toolkit and the Western Region WIC PCE Assessment Tools for Participant-Centered Nutrition Education and Services created by Altarum Institute*

Customer Service Skills Assessment

Clinic Name Angela Munson

Date 2/27/2024

INSTRUCTIONS

Evaluate each feature of customer service skills. Note areas of excellence and opportunities for improvement.

Features	Circle One		Comments
1. Are all participants treated with courtesy and respect?	X YES	NO	
2. Are staff members consistently friendly and welcoming?	X YES	NO	
3. Do staff members consistently introduce themselves to participants including their name and job role?	X YES	NO	Sometimes the support staff forget to do this consistently with every client, but for the most part this happens.
4. Do staff members use body language that is warm, open, inclusive and engaging?	X YES	NO	
5. Do staff members avoid WIC, medical jargon or complicated language that could be difficult to understand?	X YES	NO	
6. Do staff adjust their speech when talking to individuals that English is not their primary language to ensure information is conveyed correctly?	X YES	NO	Translators are used when appropriate. Translated materials are used when available. Agency has translated many WIC documents into the common languages found at HACAP WIC clinic sites.
7. Are all processes, expectations and steps of the appointment explained to participants?	X YES	NO	
8. Do staff members limit phone interruptions and side conversations with coworkers when serving participants?	X YES	NO	
9. When staff collect phone numbers, do staff ask for the phone numbers of the additional parent/guardian when applicable?	X YES	NO	
10. Do staff members use appropriate phone etiquette?	X YES	NO	
11. How do staff members communicate with difficult or angry participants?			Staff remain calm and keep the conversation focused on relevant facts about the appointment. Staff will get a supervisor when appropriate or refer the situation to Todd Erskine (Program Integrity Coordinator).

12. Do staff members manage multiple tasks during peak times?	X YES	NO	
13. Are staff members able to explain the process for handling a participant complaint?	X YES	NO	Staff would inform the WIC Coordinator and/or WIC Support Staff Supervisor about participant complaints. Then WIC Supervisor would follow state policy on how to deal with the situation.
14. Are bilingual staff or interpreter services available and used appropriately?	X YES	NO	Interpreter services available in-person and/or via phone when applicable. HACAP uses Hands Up Communication for phone interpretation and Humble Language Institute for in-person interpretation.
15. Do staff members focus on the participant rather than the computer?	X YES	NO	
16. When calling a calling a participant back for an appointment do staff include all family members that are present?	X YES	NO	
17. Do staff interact with all members of the family when appropriate?	X YES	NO	
18. Is talk-time balanced between the participant and staff?	X YES	NO	
19. Are appropriate referrals for other programs and organizations offered and properly documented?	X YES	NO	
20. Do staff members adequately explain the purpose of the WIC program to every new participant?	X YES	NO	
21. Are participants asked if they have any questions or concerns about their food package, use of WIC foods, and shopping experience?	X YES	NO	
22. Are staff following up on usage of food package, use of WIC foods and the shopping experience at the second appointment?	X YES	NO	

Clinic Environment Assessment

Clinic Name Angela Munson

Date 2/27/2024

INSTRUCTIONS

Evaluate each feature of the clinic. Note areas of excellence and opportunities for improvement.

Features	Circle One		Comments
1. Is the clinic easy to find with clear, visible signage (on all doors) and in appropriate languages (e.g. English, Spanish, etc.)?	X YES	NO	
2. Is the physical entrance to the clinic “welcoming” and free of clutter?	X YES	NO	WIC signs are posted at the entrance of building and where WIC is located.
3. Describe what the waiting room looks, smells and sounds like:			Large open room. The check-in desk is at a table since this is a travel clinic. Chairs and tables all around the large room for client to wait in.
4. Would you mind waiting in this waiting room?	YES	X NO	I would not mind waiting in this large space.
5. Are there posters, bulletin boards, or handouts that show fathers, people of color and/or non-traditional family units?	YES	X NO	There are no posters, as this is a large open room in a church and not HACAP’s building. It is a travel clinic.
6. Overall, how do you think the upfront intake process & waiting area environment may affect the WIC applicant’s & participants’ perspectives & attitude on WIC?			Large open space which could be a concern for confidentiality. Staff try to spread out as much as possible.
7. Is the clinic clean, safe, comfortable, and attractive?	X YES	NO	It is clean but is an old church.
8. Is the clinic signage displaying positive messaging?	X YES	NO	All required clinic signage is displayed on a board.
9. Is clinic signage only in English?	X YES	NO	However, this clinic does not see non-English speaking families. All required clinic signage is displayed on a board.
10. Does the waiting room have items to occupy children?	X YES	NO	Toys in open room.

11. Does the waiting room have posters, photos, or bulletin boards that support positive nutrition and breastfeeding messages?	YES	X NO	There are no posters other than the required signage since this is a travel clinic.
12. Does the waiting room have posters, photos, or bulletin boards that are inclusive to all types of family units?	YES	X NO	There are no posters other than the required signage since this is a travel clinic.
13. Are individual offices or workstations arranged to encourage and promote conversation?	X YES	NO	There are tables (workstations) in a large open room. Staff try to spread out.
14. Do individual offices or workstations have items to occupy children?	X YES	NO	Toys available in the open room.
15. Is a private area for breastfeeding available upon request?	X YES	NO	There are extra areas in the church if a client needs to breastfeed.
16. Do both men and women's restrooms have a diaper-changing area or is there a family restroom available?	X YES	NO	
17. Does the service delivery environment ensure participant confidentiality at all stations?	YES	X NO	This is a large open room. Staff try to spread out as much as possible.

Service Delivery Assessment

Clinic Name Angela Munson

Date 2/27/2024

INSTRUCTIONS

Evaluate each feature of service delivery. Note areas of excellence and opportunities for improvement.

Features	Circle One	Comments
1. Are families greeted and welcomed as they enter the clinic?	X Yes NO	
2. Does all staff greet and welcome all family members throughout the appointment?	X YES NO	Sometimes the support staff forget to do this consistently with every client.
3. Does the clinic layout promote efficient service delivery and provide adequate space for participant services? What changes could be made to improve the clinic layout?	X YES NO	The layout is a large open room. Clinic can be completed in the space; however, confidentiality is an issue. Staff spread out as much as possible.
4. Is there a process in place so staff knows a participant is ready to be seen? What is the process? Does this process ensure the participant is taken in order of appointment?	X YES NO	Support staff marks client appointment "yellow" on the schedule. Support staff brings client's appointment reminder over to CPA to let staff know client is ready. Clients are seen in order of appointment.
5. Are participants seen in order of appointments?	X YES NO	
6. Are appropriate times allotted for appointments?	X YES NO	Yes, as long as clients show on time for their appointment. If client is late, client is then moved into the next available appointment time and/or rescheduled.
7. Are there any steps a participant must go through to receive WIC benefits that can create a barrier?	X YES NO	For in person appointments, clients' work schedules, distance to clinic, and inconsistent transportation resources contribute to making physical presence a barrier. This should improve over time with TeleWIC being an option.
8. How long, on average, do persons coming in for WIC services have to wait from the time they enter clinic until they meet with the first staff person?		Use the following to assess average: Check in time: Greet time: ___0-5__ Minutes

<p>9. What do you think affects the wait time to meet with the first staff person?</p>			<p>If clients are late for an appointment. They may need to wait for scheduled appointments to be checked in first.</p>
<p>10. How long, on average, do persons coming in for WIC services have to wait from the time they sign in until the time they meet with the first staff person for the health or nutrition assessment?</p>			<p>Use the following to assess average: Check in time: Greet time: ___0-5___ Minutes</p>
<p>11. What do you think affects the wait time to meet for the health or nutrition assessment?</p>			<p>If CPA is finishing another client's appointment.</p>
<p>12. Are the waiting times for participants to receive services reasonable? (If participants wait at more than one occasion, evaluate total wait time.)</p>	<p>X YES</p>	<p>NO</p>	
<p>13. Does staff work as a team? (e.g. Is there a process to share questions with appropriate staff members so the question is answered?)</p>	<p>X YES</p>	<p>NO</p>	
<p>14. What procedures are in place to remind participants about upcoming appointments?</p>			<p>One Call Text messages and clinic staff do reminder calls.</p>
<p>15. What processes and mechanisms are in place to collect and utilize participant feedback? When was feedback last collected?</p>			<p>Annual satisfaction survey is administered via One Call at an agency and state level.</p>
<p>16. Are regular time studies completed to determine the average time a participant spends in the WIC office and average wait to receive services?</p>	<p>X YES</p>	<p>NO</p>	<p>Average wait times are 0-5 minutes to check in upfront, and to see a CPA. The average length of an in-person appointment is 15-30 minutes per person.</p>
<p>17. Are same-day or walk-in appointments available at this location?</p>	<p>YES</p>	<p>X NO</p>	<p>While there are not formal walk-in appointment slots on the schedule, walk-in clients can be seen the same day if there is an opening on the schedule. If not, then they are scheduled for the next available appointment slot.</p>
<p>18. Are weekend appointments available at this location?</p>	<p>YES</p>	<p>X NO</p>	
<p>19. Is lunchtime or extended hour appointments available at this location?</p>	<p>X YES</p>	<p>NO</p>	<p>Extended hours available on the 2nd Wednesday of the month. This would allow for lunchtime appointments from 12-1 pm on that day.</p>
<p>20. If no extended hour and/or weekend appointment times are available at this location. What efforts are in place to serve families?</p>			<p>Late night appointments are available in Vinton County once per month. Late night is as late as the church will let us be in the building.</p>

21. Does staff review the previous risks, referrals and/or care plan prior to meeting with the participant?	X YES	NO
22. Does staff ask permission before completing tasks during the appointment?	X YES	NO
23. Describe what happens to a WIC participant from the time they enter the door until they leave the clinic. Who issues the WIC benefits?	<p>Client checks in at check in table. Support Staff brings appointment reminder over to CPA. CPA reviews chart and calls client over to their workstation to complete entire WIC appointment. If the client is not new, then CPA issues food benefits on card and if client is new, then client goes back to check in table to receive a card and food benefits are issued on the card.</p>	

LOCAL SERVICE ASSESSMENT CHECKLIST

Group & Individual Education Assessment

Clinic Name Angela Munson

Date 2/27/2024

I. GROUP INSTRUCTIONS

Evaluate each feature of group education. Note areas of excellence and opportunities for improvement.

Features	Circle One		Comments
1. How often is nutrition education offered in a group format?			<input type="checkbox"/> Always <input type="checkbox"/> Sometimes <input checked="" type="checkbox"/> Never (If never move on to part II: Individual pg. 7) Describe:
2. Is there adequate and comfortable seating?	YES	NO	
3. Does the layout of the room facilitate conversation (e.g., Face-to-face, noise, group in circle)?	YES	NO	
4. Are participants provided education appropriate for their nutrition risk or category?	YES	NO	
5. Are participants given a choice of the education they will receive?	YES	NO	
6. Is the room clean and attractive?	YES	NO	
7. Are there posters, bulletin boards, or handouts that support positive nutrition and breastfeeding messages?	YES	NO	
8. Are there posters, bulletin boards, or handouts that show fathers, people of color and/or nontraditional family units?	YES	NO	
9. Does the room provide a separate, quiet space away from the noises of clinic operation?	YES	NO	
10. Are there ways to keep children busy and engaged?	YES	NO	
11. Did the facilitator open the session warmly and set the agenda for the group?	YES	NO	
12. Did the facilitator engage attendees with:			
<ul style="list-style-type: none"> open-ended questions? 	YES	NO	

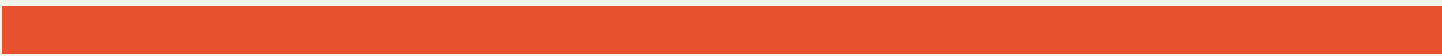
• reflective listening?	YES	NO
• probing?	YES	NO
• other skills and techniques?	YES	NO
13. Did the facilitator incorporate hands on or problem solving activities?	YES	NO
14. Were visual props used to illustrate and enhance learning?	YES	NO
15. Do the visual props and materials send a positive message? Describe.	YES	NO
16. Was the session tailored to participants' questions and needs?	YES	NO
17. Was the information provided for the group appropriate and accurate?	YES	NO
18. Did the facilitator recognize and support participants' culture and how it might impact dietary practices?	YES	NO
19. Did the facilitator summarize the session?	YES	NO
20. Are there sessions available and/or inclusive of father figures and other race/cultural groups that are present in the community?	YES	NO
21. How are the participants scheduled for nutrition education appointments?		
22. How long was the nutrition education session?		

II. INDIVIDUAL INSTRUCTIONS

Evaluate each feature of 1:1 education. Note areas of excellence and opportunities for improvement.

Features	Circle One	Comments
1. How often is nutrition education offered in a 1:1 format?	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	<input checked="" type="checkbox"/> Always <input type="checkbox"/> Sometimes Describe: Nutrition education appointments are completed by phone a majority of the time, however wichealth.org is offered as well.
2. Is there adequate and comfortable seating? How many chairs are available?	X YES <input type="checkbox"/> NO	Yes, but generally nutrition appointments are completed via phone 1:1. For in-person appointments, seating is available, 2 per room.
3. Does the layout of the room facilitate conversation (e.g., Face-to-face, quiet)?	X YES <input type="checkbox"/> NO	

4.	Are participants provided education appropriate for their nutrition risk or category?	X YES	NO	
5.	Is the room clean and attractive?	X YES	NO	
6.	Are there posters, bulletin boards, or handouts that support positive nutrition and breastfeeding messages?	X YES	NO	Handouts only. Travel clinic.
7.	Are there posters, bulletin boards, or handouts that show fathers, ethnically diverse and/or non-traditional family units?	X YES	NO	Handouts only. Travel clinic.
8.	Does the room provide a separate, quiet space away from the noises of clinic operation?	X YES	X NO	Large open room. No individual spaces. Staff spread out as best as possible.
9.	Are there ways to keep children busy and engaged?	X YES	NO	Toys available upon request.
10.	Did the CPA open the session warmly and explain the purpose of the appointment?	X YES	NO	
11.	Did the CPA engage the client with:			
	• open-ended questions?	X YES	NO	
	• reflective listening?	X YES	NO	
	• probing?	X YES	NO	
	• other skills and techniques?	X YES	NO	
	• engage both parents when appropriate?	X YES	NO	
12.	Did the CPA incorporate hands on or problem-solving activities?	X YES	NO	
13.	Were visual props used to illustrate and enhance learning?	X YES	NO	We have milk and juice cups available.
14.	Do the visual props and materials send a positive message? Describe.	X YES	NO	
15.	Was the session tailored to participants' questions and needs?	X YES	NO	
16.	Was the information provided for the participant appropriate and accurate?	X YES	NO	
17.	Did the CPA recognize and support the participants' culture and how it might impact dietary practices?	X YES	NO	
18.	Did the CPA summarize the session?	X YES	NO	
19.	How are the participants scheduled for nutrition education appointments?			They are scheduled for their next appointment (NEP) by support staff at the beginning of the appointment. If their next appointment requires someone in the family to come in, then appointment is scheduled as



	a nutrition appointment (NUTR), instead of a NEP, for that member and that nutrition appointment (NUTR) is attached to the rest of the family's appointments.
20. How long was the nutrition education session?	15 minutes per person for most in person appointments. Nutrition appointments are 5-15 minutes per person.

LOCAL SERVICE ASSESSMENT CHECKLIST

Recommendations for Improving WIC Services

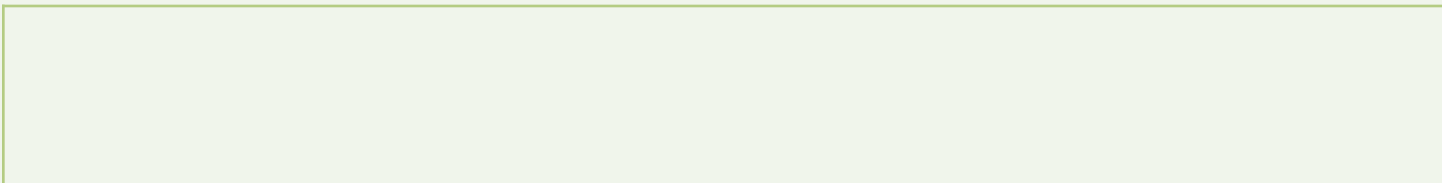
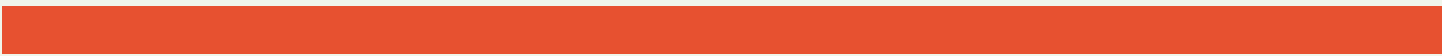
Clinic Name Angela Munson

Date 2/27/2024

INSTRUCTIONS

Evaluate each feature of the clinic. Note areas of excellence and opportunities for improvement.

Features	Recommend Changes?		Comments
1. Welcoming participants	X YES	X NO	Support Staff need to be consistent with saying name and role.
2. Ease of finding clinic	YES	X NO	
3. Clinic entrance and waiting area	YES	X NO	
4. Intake procedures	YES	X NO	Entire space could be more private, but it is a travel clinic, and it is the space we have available to us.
5. Clinic overall appearance and space (hallways, counseling rooms, etc.)	YES	X NO	
6. Participant scheduling	YES	X NO	
7. Participant wait times	YES	X NO	
8. Education, props and materials	YES	X NO	
9. Staff teamwork	YES	X NO	
10. Confidentiality of clinic space	X YES	NO	Entire space could be more private, but it is a travel clinic, and it is the space we have available to us
11. Customer service	YES	X NO	
12. Participant feedback	YES	X NO	
13. Hours of Operation	YES	X NO	
14. Clinic Location	YES	X NO	
15. Inclusiveness of father figures and nontraditional family units	X YES	NO	
16. Other features identified:	YES	X NO	



Additional Comments