



FRESH ACCESS BUCKS MYSTERY SHOPPER TOOLKIT

**Gaining SNAP Shopper Insight into
Your Nutrition Incentive Program**





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About Feeding Florida

Feeding Florida is the state's network of nine food banks working together to provide healthy and dependable solutions to ending hunger in all 67 counties. The network of food banks works with more than 2,400 partner charitable agencies —local churches, charities, schools, and health centers with food pantries —to deliver programs, services, and meals directly to more than 2 million hungry Floridians.

About Fresh Access Bucks

Fresh Access Bucks (FAB), an initiative of Feeding Florida, is a statewide nutrition incentive program currently funded through a USDA Gus Schumacher Nutrition Incentive Program COVID Relief and Response (GusCRR) grant. FAB increases access to fresh, affordable produce in underserved communities while supporting Florida's farmers and enhancing local economies. SNAP customers receive a dollar-for-dollar match for fresh Florida-grown produce when they shop with FAB at participating outlets across the state. FAB outlets include farmers markets, produce stands, CSAs, mobile markets, and community grocery stores. The FAB program strategically partners with farm-direct and brick-and-mortar retail outlets in and around food deserts, low-income communities, and along transportation routes. Currently, more than 65 farm-direct and brick-and-mortar retail outlets participate in the Fresh Access Bucks program statewide.



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Acknowledgments

Feeding Florida and the entire Fresh Access Bucks team would like to express gratitude to those who helped inform our approach and provided valuable feedback in the development of the *Fresh Access Bucks Mystery Shopper Toolkit: Gaining SNAP Shopper Insight into Your Nutrition Incentive Program*. We'd like to thank all mystery shoppers for their participation and guidance and Fresh Access Bucks program partners throughout the state for their cooperation, outreach support, and input. Thank you to Laurel Sanville, Whitney Fung Uy, and Courtney Parks at Center for Nutrition and Health Impact, Rachael Ward at Farmers Market Coalition, Joe Lesausky at Michigan Farmers Market Association, and Ted Mason at National Grocers Association Foundation Technical Center for your encouragement, feedback, and expertise. Finally, thank you to the Fair Food Network and the GusNIP NTAE Center for seeing value in this project and for funding support.



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ABOUT THIS TOOLKIT



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About this Toolkit

As **nutrition incentive (NI) practitioners**, we understand how incentive programs work at our **outlets**. We may not, however, fully comprehend the SNAP shopper experience. Do our customers understand how to shop with nutrition incentives? What barriers do they face accessing or shopping at outlets with SNAP/EBT? How do we get honest feedback about our programs?

Recruiting mystery shoppers actively participating in food assistance programs provides an opportunity to hear directly from customers what outlets do well and what could use improvement – think SNAP shopper inclusivity, ease of nutrition incentive program use, vendor compliance, or program communication.

This toolkit outlines how to design, implement, and evaluate a mystery shopper program to collect feedback and inform your NI program goals. By sharing our process we aim to create a more streamlined and organized model for other programs looking to improve the SNAP shopper experience. We recognize that every NI program is unique and has varying goals and capacities, so we've outlined the general steps. You can manage your mystery shopper program with any low, mid, or high-tech solutions you have available.

This toolkit is focused on mystery shopping as it relates to nutrition incentive programs but may be useful for a broad range of other food projects, food assistance programs, or farmers markets. This toolkit might also be useful in other fields where unbiased feedback from customers can be incorporated into making program improvements.



NUTRITION INCENTIVE PRACTITIONER

Someone who manages a nutrition incentive program. Nutrition incentives encourage shoppers to purchase more fruits and vegetables by offering additional dollars that can only be spent on produce.

OUTLETS

Farmers markets, produce stands, CSAs, mobile markets, community grocery stores, or other locations where customers shop using nutrition incentives. Also referred to as firms or sites.



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What is Mystery Shopping?

Mystery shopping is a practice used by organizations to evaluate customer experience and assess regulatory compliance. Mystery shopping uses specially-trained customers, or mystery shoppers, who shop in person or online and provide feedback on their experience. Organizations can then use feedback from mystery shoppers to implement short and long-term changes to programs and services.



HOW MYSTERY SHOPPING WORKS AT NI OUTLETS

1. Recruit, train, and assign each mystery shopper to a designated NI outlet. Note that only customers with active SNAP/EBT cards are eligible to participate.
2. Once trained, a mystery shopper visits their assigned outlet and makes a purchase using SNAP/EBT.
3. Mystery shopper submits a survey detailing their experience, including but not limited to availability and quality of produce, interactions with staff, and understanding of nutrition incentives.
4. Shopper receives a stipend for participation and completion of survey.



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Why We Created a Mystery Shopper Program

We created a mystery shopper program to collect unbiased shopper feedback on SNAP and FAB **program compliance**, to find ways to enhance the SNAP shopper experience at FAB outlets, and to develop better resources for our partner outlets and market vendors.

As program administrators, we know where to find the SNAP booth at a farmers market or farm stand and to look for SNAP signage at a grocery store. However, can a SNAP shopper visiting an outlet for the first time easily find it? Do they feel welcome? Do they leave with a good understanding of our nutrition incentive program? These are all questions shoppers can help us answer.

It's important to gather feedback from shoppers with diverse experiences, needs, and backgrounds. These shoppers can provide insight and details we might have missed as program administrators. By gathering shopper feedback, we can strengthen and expand our current network and make improvements to ensure program compliance. We can share shopper observations with individual outlets and create custom resources to improve the long-term success of SNAP and nutrition incentive programs at their locations.



PROGRAM COMPLIANCE

Adherence to SNAP and NI program regulations



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GETTING STARTED



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Getting Started

Managing a mystery shopper program requires adequate planning, time, and resources. In this section, we'll detail the steps to constructing a mystery shopper program including determining your goals and outcomes, timeline, and budget.



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Determining Goals

First, take some time to determine your main goals and desired outcomes. What do you hope to accomplish with a mystery shopper program? Work with your team to decide what feedback you want to collect from shoppers and ask outlets what they hope to learn from shoppers.

You should also consider where you'd like to see improvements. Is your goal to make improvements to your entire program or to refresh a particular outlet? Depending on the size of your nutrition incentive program, consider collecting feedback from a particular city or county, or choose a small group of diverse outlets throughout your state. Alternatively, if your goal is to improve your program on a wider scale, consider collecting feedback from all outlets across a region or the state.

Once you've established your main goals, you'll need to lay out your timeline and budget.

FAB MYSTERY SHOPPER PROGRAM GOALS



- Ensure outlets are welcoming, inclusive, and simple for SNAP shoppers to navigate
- FAB outlets clearly explain the nutrition incentive program to SNAP shoppers
- Markets display appropriate signage communicating accepted payment types, pricing, and produce origin
- Outlets correctly administer the nutrition incentive and provide the appropriate change at checkout





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Creating a Timeline

Now that you have your goals outlined, it's time to determine the timeline for your mystery shopper program. We recommend running your mystery shopper program for one or two market seasons. A finite amount of time will allow you to stop, analyze data, and make any necessary changes before continuing for another season or incorporating mystery shoppers into your NI program long-term.

Factor in time for creating a shopper application, training, and survey. You'll also need time to market the program to potential shoppers. To give you an idea, it took the FAB team 3 months to plan and prep before recruiting shoppers.

After recruiting shoppers, determine how much time you'll allow participants to shop and provide feedback. Think about how long shopper feedback analysis will take as well as the time for any follow-up, such as delivering feedback to outlets, creating new resources based on shopper insight, and implementing changes.

Lastly, keep in mind other projects, programs, or surveying that you already have planned. Decide who will manage the mystery shopper program and who will provide support.



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Next, set deadlines for each step on your project timeline. To facilitate this process, we've included a sample timeline below. You can use the sample timeline and adjust any of the steps to suit your own strategy. Remember multiple steps can occur simultaneously. The timeline for every NI program will vary as different programs have varying capacities and resources.



TIMELINE

Before Recruiting Shoppers:

- **Create materials for mystery shopper recruitment** – Design materials to explain your mystery shopping goals and attract shoppers. Create materials for digital and physical distribution. *See 'Recruiting Shoppers' on page 21*
- **Develop a mystery shopper application** – Create a simple application for interested SNAP shoppers to fill out. *Learn more about creating an application on page 20*
- **Create training materials** – Determine how you'll train shoppers - a guide, a video, etc. *See 'Training Shoppers' on page 23*
- **Develop a shopper tracking system** – Your tracking system should monitor where mystery shoppers are in the process and which outlets have or need mystery shoppers. Software like Qualtrics, Google Forms, or SurveyMonkey can load data directly into a spreadsheet.
- **Create correspondence templates** – You'll need to communicate with mystery shoppers throughout the process. Create email templates for correspondence to save time. *See email templates on page 41*
- **Develop and refine your instrument (survey, interview guide)** – Be sure to budget plenty of time to identify or develop an instrument that you would like to use, pilot it in the field and/or undergo expert review, and finalize the instrument before mystery shopping begins.
- ▼ *See 'Conducting Research' on page 25*



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- **Institutional Review Board (IRB)** – Factor in time to prepare an IRB submission, board review, and revisions. You may also need time for staff to complete IRB training if they have not already. *Read more about IRB on page 29*

Recruitment period:

- **Application and shopping window** – Determine the amount of time your application will be open. Will shoppers apply and shop on a rolling basis? Or will your application be open for a certain amount of time and then close? Determine the window of time you'll give individual applicants to shop and complete their survey.



Factor in time to communicate with shoppers once you begin recruitment. Some shoppers might have questions or concerns before they apply, after they apply, or once they've been selected as a mystery shopper. Designate who will be available to answer questions and provide any shopper follow-up.

Once the shopping window has closed:

- **Collect and analyze data** – If your shoppers are filling out surveys on a rolling basis, factor in time to collect them. If you're gathering feedback via interviews or focus groups, factor in time to conduct the interview(s), transcribe all notes, analyze data, and write and submit a report. Keep in mind the time it will take for qualitative or quantitative data analysis based on which method(s) you choose. *For more information on data collection methods, see page 26*
- **Create deliverables** – Determine how much time you'll need to create any deliverables such as new marketing materials, vendor resources, or a summary of shopper feedback to provide to outlets.



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Creating a Budget

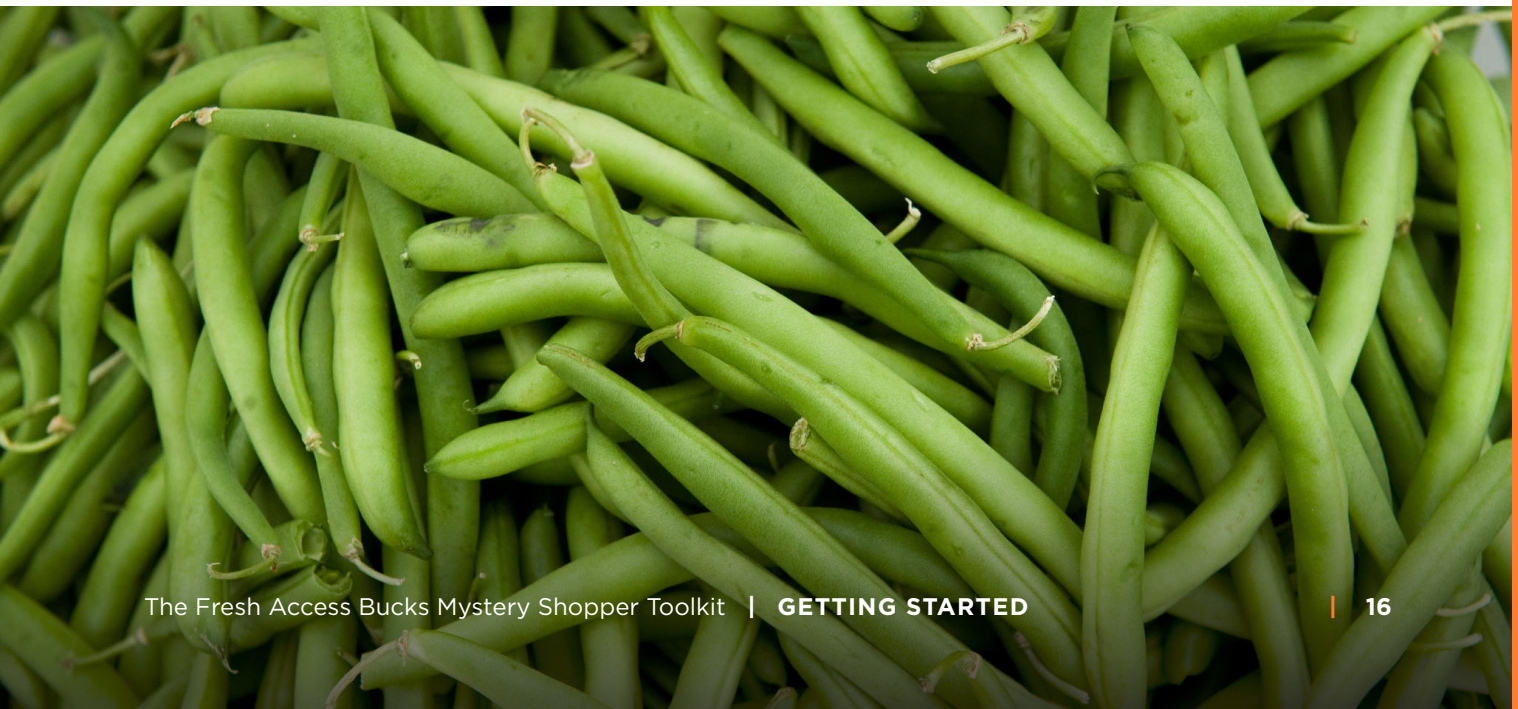
Once you establish your program goals and timeline, it's time to create a budget. Incorporate costs for marketing, software, and deliverables. Decide how much to compensate shoppers for their time. We provided a \$45 stipend for mystery shoppers who completed the entire mystery shopping process including training, shopping, and survey.

Additionally, consider the source of funding for your mystery shopper program. Do you already have funds available, or will you need to fundraise? FAB was awarded a Nutrition Incentive Hub Innovation Grant to recruit mystery shoppers, gather feedback, and build this toolkit!

To get an idea of how much it might cost to run your mystery shopper program, here's a sample of potential budget line items.

Potential budget line items

- ☒ Personnel/Staff time
- ☒ Travel
- ☒ Materials/Supplies
- ☒ Contractual costs: Graphic design, video creation
- ☒ Mystery Shopper stipends





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4 PROGRAM DESIGN AND IMPLEMENTATION



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Program Workflow

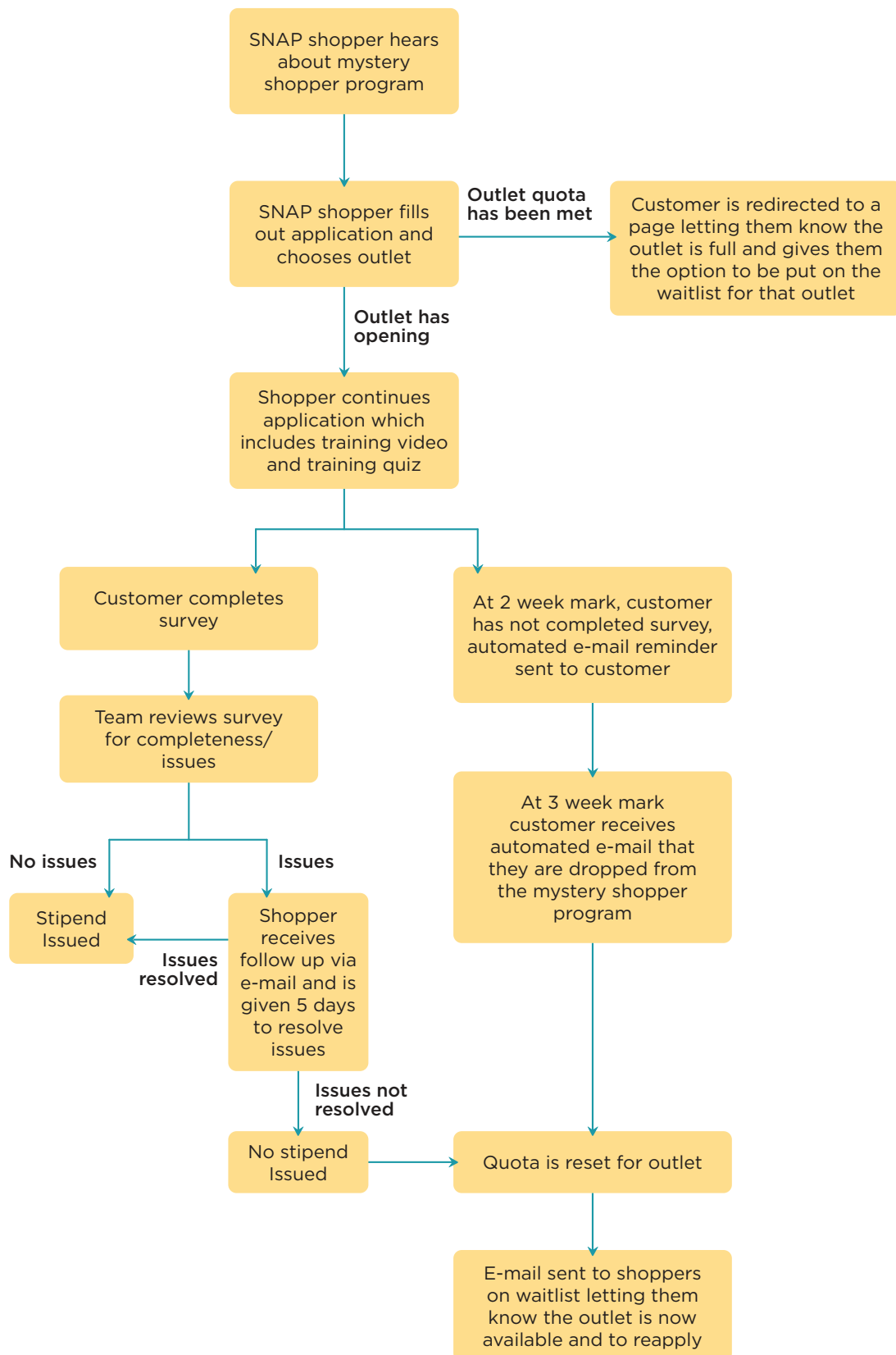
It's important to consider all steps in the mystery shopper process, both for the customer and on the administrative end. Ensure that you have a detailed plan to execute each step, a person assigned to complete the various tasks, and a backup in case that person is away.

When designing your workflow consider:

- ☑ How will customers express interest in participating?
- ☑ How will you decide which customers shop, and where? Who will be in charge of making that decision?
- ☑ How will training occur?
- ☑ How will customers receive their survey or complete their interview?
- ☑ Who will communicate with customers if they have a question?
- ☑ How will you let customers know when their shopping window has closed?
- ☑ Will you have a waitlist for mystery shopper positions that have been filled? If so, how will you open the spot back up and communicate with shoppers on the waitlist?
- ☑ How will customers receive their stipends and by what method?
- ☑ Is it possible to automate or combine any of these tasks?



FAB Mystery Shopper Program Workflow



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Mystery Shopper Application

To begin recruitment for your mystery shopper program, create a simple application for interested shoppers. Consider the information you'll collect, including shopper name, email, zip code, preferred shopping location, etc. *You can review a sample application on page 47.*

Before officially launching your application, finalize the details of your selection process and decide the rules you'll implement for applicants.

✓ Who can apply?

Shoppers must be active SNAP recipients to use the nutrition incentive program.

✓ How many times can a shopper apply?

If your NI program has multiple outlets, can a shopper apply to more than one? Can they re-apply?

✓ Will you select shoppers on a first-come, first-served basis?

Or will there be a shopper selection process once applications are submitted? If there is a selection process, who will make those selection decisions and how will applicants be evaluated for selection?

✓ Will your application be open on a rolling basis, or will there be an application period?

✓ Will there be a waitlist?

If a mystery shopper position is filled, will you operate a waitlist of interested applicants? If so, how will those waitlist spots be filled?

✓ Once selected, how much time will shoppers have to shop and fill out their survey?

Think about the details of your application and application processes. Include any pertinent information — the length of the survey, stipend amount, and who to contact with questions — at the beginning of your application for transparency.



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Recruiting Shoppers

Get the word out about your mystery shopper program by creating a recruitment strategy. Decide where and how you'll market your program to shoppers. A great place to start recruiting is at your outlets.

Outlets have a vested interest in shopper feedback to increase market participation, engagement, and vendor sales. Host an information session for outlets to learn how the program will work and the benefits it will provide them. This can be as simple as a short virtual meeting outlining program basics. Being clear about the data you collect and how you plan to share that data with outlets will improve their engagement.

To help outlets market the mystery shopper program, provide simple promotional materials that can be shared in-person at their location, through e-newsletters to existing customers, or via social media. Provide printed flyers with QR codes or a simplified web link to the application. Include key details about how the program will work, who is eligible to apply, the stipend amount, and how it will be delivered. Digital versions of the flyer can be used for e-newsletters. For social media, share images that illustrate individuals shopping at an outlet with key information about the program and a simplified web address to apply. QR codes are not recommended for social media posts. *See sample marketing materials on pages 51 – 54.*



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Connecting with Community Partners

Community partners can also help spread the word about your mystery shopper program. Provide partners with flyers for printing, digital flyers for e-newsletters, and sample images and text for social media posts. Be sure partners understand the program basics and know the target audience for participation. Tag community partners in your own social media posts to make it easy for them to simply share the information.

Community Partners can include:

- ✓ Local organizations/non-profits
- ✓ Health organizations
- ✓ SNAP/EBT agencies
- ✓ Libraries
- ✓ Churches
- ✓ Discount stores
- ✓ Food banks
- ✓ Community centers
- ✓ Local government agencies
- ✓ Employment resource centers





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Training Shoppers

Applicants should be clear on their role, what to look out for, and how to fill out the mystery shopper survey. Decide how you'll train shoppers and what information you'll provide in training. Training methods include:



Training manual



Training video



Training module
and quiz

Training should give shoppers a general idea of how your program works without going into too much detail. The goal of mystery shopping is to see if outlets advertise and explain the nutrition incentive clearly. It's important to give mystery shoppers the opportunity to learn this through your program's resources as well as the outlet's website, social media, and in-person communication.

If a shopper didn't understand the discount after shopping, you'll want to know. If a shopper left feeling confident about how your program works, you'll also want to know. Shoppers can always follow up with questions.

💡 If you are using a survey, we recommend sharing a copy of the survey ahead of time with shoppers along with a checklist of the specific things they should look out for while they shop.



We opted for a training video and accompanying quiz to ensure mystery shoppers understood the distinction between SNAP and FAB eligible items. You can watch our training video [here](#) and see our training quiz questions in the mystery shopper application on page 46.



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Conducting Research

When you ask mystery shoppers (referred to participants in this section) for their feedback, you are conducting research. The four main parts of the research process include 1) design and planning; 2) data collection; 3) data analysis; and 4) reporting. Here, we provide considerations for each of these steps, but we highly recommend consulting with a social science researcher or an expert in research methods and design, such as a college or university professor, if you do not have someone with these skills as part of your team.



Part 1: Design and Planning

In the design and planning stage, map out the important components of your research:

● **Develop Your Research Questions**

Research questions are generally broad, overarching questions that guide your research and are often informed by the purpose, goals, and objectives you have for your project. Consider “how” and “why” questions, as these tend to be broader and more encompassing than “what,” “where,” and “when” questions. For example, how do customers experience shopping at program outlets when using your nutrition incentives? How do certain aspects of your program (e.g., produce selection, outlet location, labeling) impact customer satisfaction? Research questions will help guide the development of your research instrument (e.g., survey, interview guide) as discussed in the following section.



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Design Your Research Protocol

This includes logistical planning for your data collection, data management, analysis, and reporting.

Data Collection Methods

There are many ways to collect data, but surveys, interviews, focus groups, or some combination of these methods would likely work best for a mystery shopper program. We used surveys in our mystery shopping pilot, however, interviews and/or focus groups (or these methods combined with surveys) could lend to a deeper understanding of your customers' experiences.

METHOD	DESCRIPTION	✓ PROS	✗ CONS
Survey	A survey asks participants a series of defined questions. Participants can complete a survey questionnaire individually on paper or through online survey software. Researchers may also prefer to administer surveys over the phone or face-to-face with participants.	<ul style="list-style-type: none">• Easy to use/comfort and familiarity with surveys• Participants may feel that they can be more honest• Flexibility to be completed on participants' own time• Online software can make it easier to manage and analyze data	<ul style="list-style-type: none">• Must carefully consider the length of the survey, the language used, question types, scales, logic, and other important design factors• Increased potential for fraud/scams• Less flexibility once data collection begins
Interview	A conversation between two people guided by a series of questions (called an interview guide); may be structured, semi-structured, or unstructured.	<ul style="list-style-type: none">• Increased flexibility for adapting interview guide during data collection process• May be able to gain a fuller, richer understanding of customers' experience	<ul style="list-style-type: none">• More time investment for participants• Data transcription, coding, and analysis can be time-consuming
Focus Group	An interview of a small group typically comprising 6-12 individuals.	<ul style="list-style-type: none">• Increased flexibility for adapting interview guide during data collection process• May be able to gain a fuller, richer understanding of customers' experience	<ul style="list-style-type: none">• More time investment for participants• Must be well-moderated to ensure participation• Requires team to record participants' responses, observational data such as interactions among participants and body language and to facilitate.• Data transcription, coding, and analysis can be time-consuming



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- **Data Types**

Data can be open-ended (qualitative), closed-ended (quantitative), or a mix of both qualitative and quantitative. If you are using focus groups or interviews, then your data will naturally be qualitative (note that some qualitative data can be converted to quantitative data, however). Surveys can be quantitative, qualitative, or a mix of both. The types of questions you ask and data you collect will determine the subset of methods that can be used for analysis. If you are collecting quantitative data and wish to conduct statistical analyses, you may want to consult with a statistician during the planning stage to help determine the requirements needed to meet certain statistical tests such as sample size.



QUANTITATIVE EXAMPLE

Compared to other places that your shop, the prices of fruits and vegetables are:

- ☐ Much higher
- ☐ Somewhat higher
- ☐ About the same
- ☐ Somewhat lower
- ☐ Much lower



QUALITATIVE EXAMPLE

Please provide any comments or feedback on why you scored the items above the way that you did. Feel free to note anything you did or did not like, provide specific examples, and provide any other information that may help us in evaluating this outlet.



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- **Sample**

Who are your participants? How large will your sample size be? Will you collect a predetermined number of responses, or will you sample until you reach saturation (when little new information is appearing in your data)? Again, if working with quantitative data, you may wish to consult with a statistician when making this determination.

- **Data Management and Confidentiality**

Consider how you plan to keep your participants' data safe and confidential. How will you protect your research participants? How will you safeguard and maintain your data? How will you protect your research participants, safeguard and maintain your data and guard against any potential misconduct or data breaches? It's important to determine your data management plan before collecting any data. To protect our participants, we removed all identifying information from the dataset and stored the data on a secured server, accessible only by IRB trained staff.

- **Reporting**

What will your data be used for and how will it be reported (and to whom)? Determining this early on will help guide the development or selection of your research instrument. One way that we reported our data was by sharing outlet-specific feedback with our partners in order for them to make improvements and expand offerings that were satisfactory to shoppers.

- **Instrument Development and Selection**

The development or selection of your research instrument, i.e., survey or interview guide, should be guided by your goals for the project and your research questions. Keeping these in mind will help shape the questions you ask your shoppers. For example, if you want to know if your outlet felt welcoming, you might ask if shoppers thought employees were friendly or if they would shop there again. We recommend using a research instrument that has already been developed and validated, or developing your own instrument and either piloting it in the field or undergoing expert review.



Our mystery shopper program used a survey designed in-house by program staff and included both open- and closed-ended questions. The survey was subjected to expert review by individuals at several professional organizations related to our work, including the Michigan Farmers Market Association (MIFMA), the Farmers Market Coalition (FMC), the National Grocers Association (NGA), the Nutrition Incentive Program Training, Technical Assistance, Evaluation, and Information Center (NTAE), and the Center for Nutrition and Health Impact before being used in the field.

Be sure that the questions are easy to understand. You'll also want to consider the length of your survey or interview. We recommend that interviews last no more than 45-60 minutes and focus groups no more than 60-90 minutes.

Pilot-testing your survey or interview guide can help ensure that the length and questions are appropriate for your participants.

If using a survey, decide on the format (paper, digital, in-person, over the phone). Remember to give yourself plenty of time to build out the survey in appropriate software like SurveyMonkey or Qualtrics,, check it for technical errors, and pilot test the survey or put it through expert review.

For more on survey development, we recommend Dillman, D. et al. (2014) *Internet, Phone, Mail and Mixed-mode Surveys*.

Institutional Review Board (IRB)

An Institutional Review Board (IRB) is a committee that reviews research to ensure the rights and welfare of human subjects are protected. All research involving humans must be approved by an IRB in accordance with all regulations set forth by the U.S. Food and Drug Administration (FDA) the U.S. Department of Health and Human Services (HHS).



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Your IRB submission will need to include your research instrument (survey or interview guide) and research protocol. You may also need to include copies of your application, promotional materials, and mystery shopper training materials. You'll want to address the following in your IRB submission: 1) how to obtain voluntary consent from your participants, 2) assessment of any risks or benefits from the study and how to minimize harm to your participants, 3) how participants were selected and what methods were used to ensure no participants were unfairly included or excluded, and 4) maintaining confidentiality of your participants. Staff who will be involved in the research process will need to complete IRB training.

Be sure to give plenty of time for staff to complete their IRB training, to prepare your IRB submission, and for the board to review it. The IRB may send back requested clarifications or revisions needed as well.

Part 2: Data Collection

Data collection occurs as your participants complete their surveys and/or interviews. Remember to maintain the anonymity of your participants by removing their names and using aliases or pseudonyms in their place. If you are collecting data using surveys, we highly encourage reviewing surveys as they come in for accuracy and to request clarifications from shoppers as needed. Reviewing your survey data as it comes in will also help to speed up the data analysis process. You'll want to look for any data anomalies, errors, or anything else that looks suspicious or inaccurate. If you are conducting interviews or focus groups, it will help to start transcribing your data early.

You may even wish to start preliminary data analysis while data collection is still in process! We'll talk more about data transcription and analysis in the next section.



We issued stipends to participants once their survey had been reviewed and any issues were addressed.



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Part 3: Data Analysis

The analysis stage of the project is when you finally begin to see the fruits of your labor! The extent of your evaluation will likely depend on your project's goals. Earlier, we discussed the differences between qualitative and quantitative data—it's also important to note that each approaches data analysis in completely different ways.

If you collected data through interviews or focus groups, you first need to transcribe your data (unless you recorded them with a program with auto-transcription capabilities). It's important to double-check your transcriptions for accuracy. There are several ways to go about qualitative data analysis, however, many will involve reading through transcripts (many times!) and coding the data. You may wish to look for themes, note frequencies, or go about your analysis in another way. We recommend consulting a qualitative analysis text or an expert.

If you are working with survey data, the first step is to review and clean your data. Look for any errors or inconsistencies. If you collected surveys online, there is an increased risk of fraudulent behavior, so you may want to look for any indicators that the participant did not actually shop at the outlet (unless you asked for proof of purchase or original photographs to be uploaded with their survey). If you are planning on conducting statistical analyses, you will also need to prepare your data in the correct format for the statistical software, such as SAS, SPSS, R, etc.

If your survey asked closed-ended questions, you will be able to analyze your data using statistical software with descriptive statistics and/or statistical tests. If you do not have someone familiar with statistics on your team, we recommend consulting with a statistician. If your survey involved open-ended questions, then these questions can be analyzed using qualitative analysis methods.



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Part 4: Reporting

In the design and planning stage, you determined whom you wanted to report the results of your mystery shopping to and how you wanted to report your conclusions to them. In this step, you will work towards completing these reports.

Remember that when reporting your participant data, all results should be included in aggregate and there should be no identifying or potentially disclosing information that could harm your participants. If you wish to reference particular participants in your reporting (such as for a quote), you can use the participant's alias or pseudonym.



You can find a full report and summary of findings on our website www.freshaccessbucks.com once our final results are published.





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Interpreting & Using Data

You've designed your mystery shopper program. You've done the hard work of recruiting shoppers to be able to collect data. Now, take the time to create thoughtful changes tied back to your initial goals. Here are a few of our goals, the feedback we received, and how we used that data to improve our program:

GOAL	FEEDBACK	DELIVERABLE
FAB outlets clearly explain the nutrition incentive program to SNAP shoppers	Some shoppers left without a solid understanding of the nutrition incentive program while others said the program was clearly explained to them.	Explainer video for customers Each outlet advertises the FAB program differently. Some outlets provide information on their website, some have updates on social media. We wanted an easy and consistent way to explain the FAB program to customers and a simple way for our outlets to share as well.
Farmers market outlets display appropriate token, pricing, and origin signage	Some shoppers noted a lack of signage when mystery shopping at farmers market outlets while others were appreciative of pricing signage to make their shopping experience easy.	Explainer video for vendors Vendors at farmers markets also need to understand and explain the FAB program to customers. We want customers to understand which booths they can spend their tokens and on what. A simple video can reiterate the importance of signage and explain the nutrition incentive to vendors that might have new volunteers or employees week to week.
Make outlets welcoming, inclusive, and simple for SNAP shoppers to navigate	Some shoppers had trouble finding the SNAP booth at outlets, while others noted their positive experience navigating their outlet.	Follow-up summary for outlets After reviewing data, we wanted to provide mystery shopper feedback to outlets in a simple one-page summary. We asked outlets what type of feedback they were curious about and included this information as well.



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LESSONS LEARNED



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Shopper Issues

After managing our mystery shopper program for two seasons, we were able to take note of common issues. By reviewing our lessons learned, we hope you can determine ways to avoid or address similar issues before launching your mystery shopper program. Here are some application and survey issues to think about while planning:

Incomplete surveys – Some shoppers did not complete all required sections of the survey. Review surveys for completeness and accuracy of responses. Give shoppers time to fix any issues before marking their survey as complete or issuing a stipend.

Scammers – As mentioned above, make sure to review applications and surveys for accuracy and completeness. Thorough reviews help weed out scams. Some shoppers filled out an application and the mystery shopper survey too quickly to be legitimate, while others noted that they shopped at an outlet on a day it was not in operation.

Repeat shoppers – We allowed shoppers to participate and provide feedback for multiple outlets. However, we did not allow shoppers to mystery shop the same outlet more than once to maintain anonymity. Determine your rules for where and how many times applicants can shop and outline these details in your initial application. Can shoppers apply for one or multiple outlets at a time? Keep in mind that a large percent of people will apply and not complete their shopping and survey.



Technical Issues

We used Qualtrics for our mystery shopper application and survey. As applications came in, some technical issues arose. Here are some considerations to think about while planning:

Qualtrics quotas – On our mystery shopper application, shoppers were able to select the FAB outlet where they wanted to mystery shop. We had one to two slots available for each FAB outlet. Once an applicant selected a FAB outlet and submitted their application, the slot/quota would be filled, and that location would no longer be available to other applicants. Applicants who selected a full outlet had the option to join the waitlist.

If multiple shoppers filled out an application at the same time, selecting the same outlet, we would receive more applications than quotas. For example, if we have one position available at X Farmers Market and three applicants applied at the same time, we would receive 3 applications, instead of one application and two waitlist requests.

To avoid multiple approved applications for one position using quotas, you might create an application without quotas and then approve applications on a first-come, first-served basis, or using whichever selection criteria you have decided.

Complete outlets – Once a participant completed their mystery shopping and survey, we reviewed the survey for completeness and issued a stipend. We then marked the outlet as complete and removed it from the survey to avoid additional applications.

General errors – If you can build detailed workflows behind the scenes to reduce participant survey selection errors, we highly recommend you do so! For example, we had customers select the wrong outlet type on the survey during our first season of shopping, which affected the subsequent questions that they saw on the survey and caused a cascade of errors. In the second season, we created a workflow in the survey software that matched the outlet type to the outlet selection, so the customer did not need to fill in this information and would be shown the appropriate questions. Likewise, we recommend setting up your coding for data analysis in your survey software system in advance (if your survey software allows for this) to reduce the potential for future data errors.

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Measuring Outlet Compliance Issues

One of our original goals in creating a mystery shopper program was to get feedback on FAB program compliance at outlets. More specifically, determine if outlets correctly administer the nutrition incentive and provide the appropriate change at checkout. In the end, we didn't use this data as we couldn't determine if customers understood these compliance questions or the rules and regulations behind these particular survey questions. Understanding program compliance at outlets was an important goal, but there was no way to accurately measure compliance with the survey questions as we had written them. Fortunately, we were still able to get valuable shopper feedback to inform program updates and changes.

If you would like to measure compliance, we recommend using other methods. To ensure accuracy you may request more detailed information from shoppers such as itemized receipts or detailed descriptions or pictures of what they purchased. Alternatively, the most efficient way to get feedback on compliance might be to recruit a few highly trained mystery shoppers who complete more in-depth training.

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7 CONCLUSION



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Conclusion

Running a mystery shopper program is an opportunity to include SNAP shoppers and outlets in the process of improving your nutrition incentive program. By gathering shopper feedback to enhance or refresh your program, you can make improvements that will increase the long-term sustainability and success of nutrition incentive programs as a whole. We hope this toolkit helps you see the benefits of mystery shopper programs and provides guidance and support in designing your own.

A full report and summary of mystery shopper findings will be published on the Fresh Access Bucks website once the data evaluation is complete. If you would like additional resources or have questions about the Fresh Access Bucks mystery shopper program, please reach out to us at info@freshaccessbucks.com.



APPENDICES

Email Template Samples

Mystery Shopper Application Sample

Marketing Samples

Mystery Shopper Checklist



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APPENDIX A - WELCOME EMAIL TEMPLATE

Subject: Welcome to the FAB Mystery Shopper Program!

Dear [Applicant Name],

Congratulations! You have been selected as a Fresh Access Bucks (FAB) mystery shopper. FAB is a nutrition incentive program that matches SNAP dollar for dollar on fresh Florida-grown produce at select outlets. You can now begin the mystery shopping process outlined below. You must complete this process within the next **3 weeks** to receive your \$45 electronic gift card.

You selected [Outlet Name] as your mystery shopping location. Please make sure you shop at the correct FAB outlet and select the outlet name as it appears in this email when you fill out your Mystery Shopper Survey.

Mystery Shopping Process:

1) Mystery shop at [Outlet Name] **one time** using your SNAP benefits and the dollar-for-dollar FAB match.

2) Complete the **Mystery Shopper Survey** to provide feedback. You can preview the Mystery Shopper Survey before you shop here [insert link to survey pdf].

*(Before you shop you can also rewatch the **FAB training video** or bring along this mystery shopper **checklist**)*

3) Receive a \$45 electronic Visa/Mastercard gift card via email as compensation for your feedback.

You can find information about your selected outlet on the Fresh Access Bucks Locations page **here**. If you do not shop and submit the Mystery Shopper Survey within 3 weeks, the survey will close and your \$45 electronic gift card will not be issued.

Be sure to keep this email for reference and to access any links provided. Don't hesitate to reach out if you have questions. Thanks for choosing to be a FAB mystery shopper!

The FAB Team



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APPENDIX B - POSITION OPEN EMAIL TEMPLATE

Subject: FAB Mystery Shopper Application Reopen

Hello,

Thank you for your interest in the Fresh Access Bucks (FAB) mystery shopper program. A mystery shopper position for **[Outlet Name]** is now open. Positions are filled on a first-come, first-served basis, so if you are still interested, apply here **[insert link to application]** now.

As a reminder, you don't need to be a mystery shopper to take advantage of the Fresh Access Bucks Program. You can still shop with SNAP/EBT at any FAB outlet and receive a **dollar-for-dollar match** for fresh produce. We encourage you to visit an **outlet near you** if you haven't already.

If you have any questions about mystery shopping or the Fresh Access Bucks program, feel free to reach out.

The FAB Team



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APPENDIX C - REMINDER EMAIL TEMPLATE

Subject: FAB Mystery Shopper Deadline Approaching

Hi **[Applicant Name]**,

This is a reminder that your deadline to mystery shop is approaching. Your mystery shopper survey will close in **one week**. If you haven't already, please be sure to complete the following:

1) Mystery shop at **[Outlet Name]** **one time** using your SNAP benefits and the dollar-for-dollar FAB match.

*(*Please ensure that you shop at the correct FAB outlet and select the correct outlet name when you fill out your Mystery Shopper Survey. There may be outlets with similar names, so double check that the outlet you choose in your Mystery Shopper Survey matches: **FAB Outlet Selected**)*

2) Complete the **Mystery Shopper Survey** to provide feedback. You can preview the Mystery Shopper Survey before you shop here **[insert link to survey pdf]**.

*(Before you shop you can also rewatch the **FAB training video** or bring along this mystery shopper **checklist**)*

Once you complete the steps above, you will receive a \$45 Visa/Mastercard gift card via email. You can find information about your selected outlet on the Fresh Access Bucks Locations page **here**. If you do not shop and submit the Mystery Shopper Survey within 3 weeks, the survey will close and your \$45 electronic gift card will not be issued.

If you have any questions about shopping or providing feedback, don't hesitate to reach out.

Thank you,

The FAB Team



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APPENDIX D - DEADLINE EMAIL TEMPLATE

Subject: FAB Mystery Shopper Deadline Passed

Dear [Applicant Name],

Your 3-week deadline to mystery shop at your selected outlet and complete the Mystery Shopper Survey has passed. Because your shopping and/or survey was incomplete, we will not issue a \$45 electronic gift card. Please reach out with any questions or if you believe you have received this message in error.

Best,

The FAB Team



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APPENDIX E - SURVEY RECEIVED EMAIL TEMPLATE

Subject: FAB Mystery Shopper Survey Received

Hi [Applicant Name],

Thank you for submitting your Mystery Shopper Survey. A member of the FAB team will review your survey for completeness and inform you of any errors within 5 business days. If there are any issues with your survey, you will have an additional 5 business days to make corrections. **If there are issues on your survey and you do not submit corrections, your survey will be marked as incomplete and you will not receive a \$45 gift card.** If there are no issues with your survey, you will receive a \$45 Visa/Mastercard electronic gift card via email within 7-10 business days (sent via BHN Rewards).

Thank you,

The FAB Team



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APPENDIX F - TRAINING QUIZ ANSWERS

Subject: FAB Mystery Shopper Quiz Answers

Hello,

Thank you for taking the FAB Mystery Shopper training survey. The correct answers to the pop quiz are below along with a reminder of SNAP and FAB eligible items. As a note, produce not grown in Florida is only FAB-eligible at grocery outlets. We recommend you save the picture of SNAP and FAB-eligible items on your phone as a reminder when you're mystery shopping.

Survey Quiz Answers

SNAP eligible <ul style="list-style-type: none">• Homemade salsa• Honey• Bread• Packet of basil seeds• Produce grown in Florida• Produce not grown in Florida• Fruit and vegetable plant starters	Fresh Access Bucks (FAB) eligible <ul style="list-style-type: none">• Produce grown in Florida• Packet of basil seeds• Fruit and vegetable plant starters
Not SNAP eligible <ul style="list-style-type: none">• Fresh-cut flowers• Pet food• Hot coffee	Not FAB eligible <ul style="list-style-type: none">• Homemade salsa• Fresh cut flowers• Honey• Bread• Hot coffee• Produce not grown in Florida (unless at a retail/grocery outlet)• Pet food
WHAT CAN YOU BUY WITH SNAP/EBT ? 	WHAT CAN YOU BUY WITH FRESH ACCESS BUCKS? 
*HOT OR PREPARED FOODS FIT FOR IMMEDIATE CONSUMPTION NOT ELIGIBLE 	*HONEY OR PREPARED FOOD OR DRINK PRODUCTS NOT ELIGIBLE 

Feel free to reach out to us with any questions about SNAP or FAB eligible items.

Thank you and happy shopping!

The FAB Team



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APPENDIX G - APPLICATION SAMPLE

MYSTERY SHOPPER APPLICATION

1. Do you currently receive Supplemental Nutrition Assistance Program (SNAP) benefits?

- ☐ Yes
- ☐ No

2. Will you have benefits available on your EBT card to shop at the outlet within the next three weeks? (If no, you will need to complete the application once your benefits become available).

- ☐ Yes
- ☐ No

3. First Name: _____

4. Last Name: _____

5. Email Address: _____

6. City: _____

7. Zip Code: _____

8. Have you previously shopped with Fresh Access Bucks?

- ☐ Yes
- ☐ No
- ☐ I'm not sure

9. Please provide the location(s) where you have previously shopped with Fresh Access Bucks.

10. Please select the region in Florida in which you are located.

- ☐ Northwest
- ☐ Northeast
- ☐ Central
- ☐ Southwest
- ☐ Southeast



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APPENDIX G - APPLICATION SAMPLE

Displayed if Northwest selected

11. Please select a location near you that works within your availability to mystery shop. For a visual representation of FAB locations, please visit <https://www.feedingflorida.org/promotional-materials/fresh-access-bucks-market-locations>. If you would like to apply for more than one location, you will need to fill out a separate application for each location.

- ☐ Tallahassee – Frenchtown Farmers Market (3rd Saturday of the month 10am-2pm through October)
- ☐ Red Hills Online Market (order online for pickup or delivery – see <https://www.rhomarket.com/> for pickup locations)

12. How did you hear about this mystery shopping opportunity? Please check all that apply.

- ☐ Fresh Access Bucks website
- ☐ Social media post (Facebook or Instagram)
- ☐ At a FAB partner outlet
- ☐ Other (please specify)

Displayed if position at location selected has been filled

13. The outlet you selected already has a mystery shopper. Would you like to be notified if an opening becomes available at this outlet?

- ☐ Yes
- ☐ No



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APPENDIX G - APPLICATION SAMPLE

MYSTERY SHOPPER TRAINING

To complete your application, please watch the following mystery shopper training video and answer the questions that follow. For a full screen video option, please click [here](#).

Mystery Shopper Training Quiz

14. Which items listed below are eligible for **SNAP**? Select all that apply.

- ☐ Homemade salsa
- ☐ Fresh-cut flowers
- ☐ Produce grown in Florida
- ☐ Honey
- ☐ Produce not grown in Florida
- ☐ Bread
- ☐ Hot coffee
- ☐ Packet of basil seeds
- ☐ Pet food
- ☐ Fruit and vegetable plant starters

15. Which items listed below are eligible for **FAB**? Select all that apply.

- ☐ Homemade salsa
- ☐ Fresh-cut flowers
- ☐ Produce grown in Florida
- ☐ Honey
- ☐ Produce not grown in Florida
- ☐ Bread
- ☐ Hot coffee
- ☐ Packet of basil seeds
- ☐ Pet food
- ☐ Fruit and vegetable plant starters

Were your answers correct? Check them here [insert answer key or follow up with answers]

16. Do you have any questions following the training? If so, please write them here and we will get in contact to assist you.



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APPENDIX G - APPLICATION SAMPLE

17. Overall, how satisfied or dissatisfied were you with the FAB mystery shopper training?

- ☐ Extremely satisfied
- ☐ Somewhat satisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Somewhat dissatisfied
- ☐ Extremely dissatisfied

18. Please share any comments or feedback that you have regarding the mystery shopper training.

19. Please type your initials in the box below to confirm that you have completed the FAB mystery shopper training by watching the mystery shopper training video.

20. Please type your initials in the box below to confirm that you understand that Fresh Access Bucks can be redeemed for fresh Florida-grown produce, fruit or vegetable seeds, and fruit or vegetable plant starters.

21. Please type your initials in the box below to confirm that you agree to accept the mystery shopper position and will shop at the outlet selected on your application and submit the mystery shopping survey within the next three weeks.



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APPENDIX H - FLYER MARKETING SAMPLE

DO YOU SHOP WITH SNAP/EBT?

**GIVE US YOUR
FEEDBACK
GET A \$45 GIFT CARD**

Find out more about how to get started here:



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APPENDIX I - INSTAGRAM MARKETING SAMPLE





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APPENDIX J - WEBSITE MARKETING SAMPLE





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APPENDIX K - MYSTERY SHOPPER CHECKLIST



FAB Mystery Shopping Checklist

☐

Write transactions and observations down. Note SNAP, FAB and cash spent and any change given.

☐

Keep an eye out for SNAP, FAB and token signage.

☐

Take note of the quality, variety and labelling of SNAP eligible items

☐

Take pictures: Signage, fruits and vegetables, price tags, local labelling.

