

# Is it working? Measuring the performance of your texting program

## Part I: the What and the Why

Meeting 7

March 28, 2024



In chat: Say Hi! What program, locality or organization do you represent?

# Welcome from your Facilitation Team!



Notify.gov

**CODE** *for*  
**AMERICA**



# Icebreaker

1. What's a personal goal you keep track of?
2. How do you keep track?

# Agenda: Part I the What & Why

1. Grounding: How do you know if [anything] is working?
2. Why measure?
3. Getting Started: Identifying desired outcomes
4. Let's Try It: Draft a texting hypothesis
5. Is it working? How to measure...

# Grounding

# Launching new things take time!

Think about the number of:

Ideas

Meetings

Hours

People

Review processes

**How does your program  
define success?**

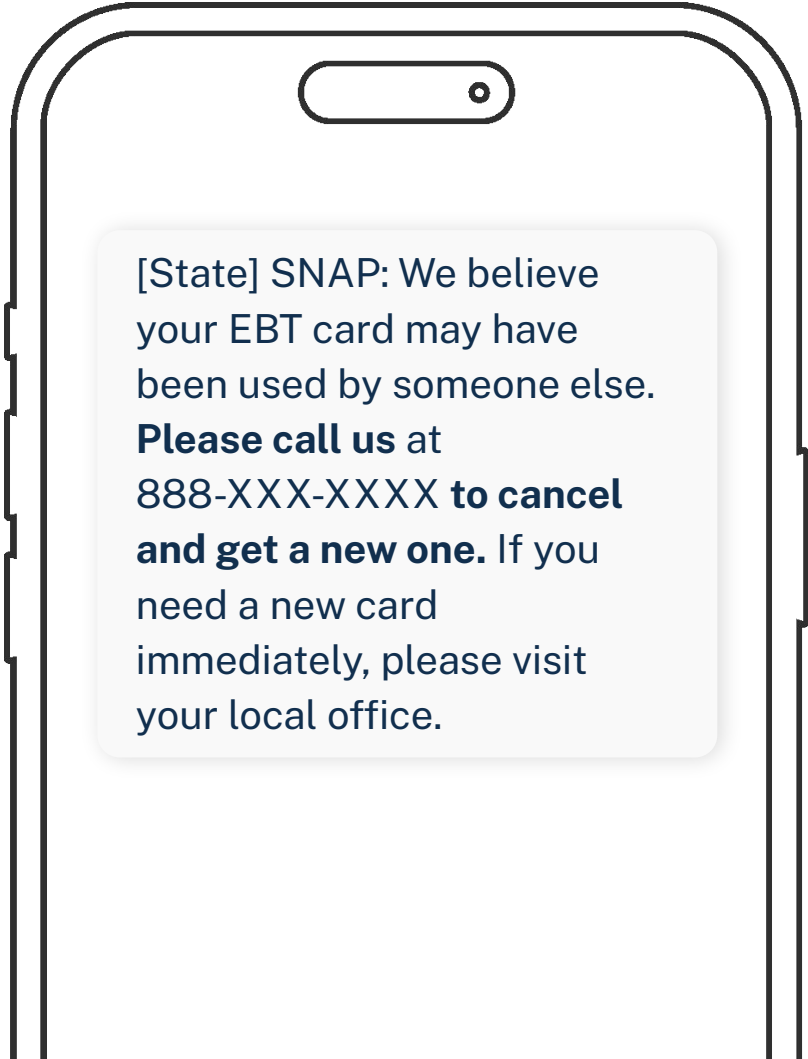
**How do you know what  
you're doing is working?**

# Texting, what is it good for?

## Text messages work best to...

- Share **timely** information
- Provide critical **status update**
- **Reminded** someone to do something

... **provoke action (usually)**

A stylized line drawing of a smartphone. The screen displays a text message in a light gray bubble. The message text is as follows:

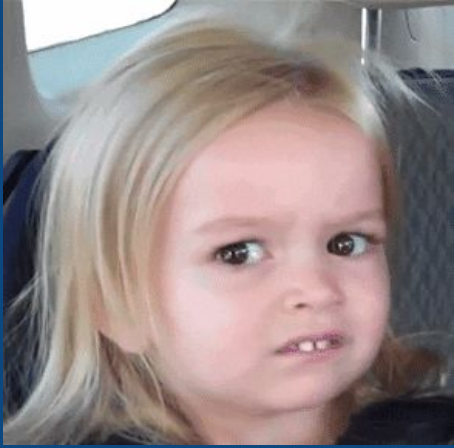
[State] SNAP: We believe your EBT card may have been used by someone else. **Please call us at 888-XXX-XXXX to cancel and get a new one.** If you need a new card immediately, please visit your local office.

# Texting = Program Success

Come off mute/throw in chat:

- What is a problem your program is facing that texting could be a solution for?





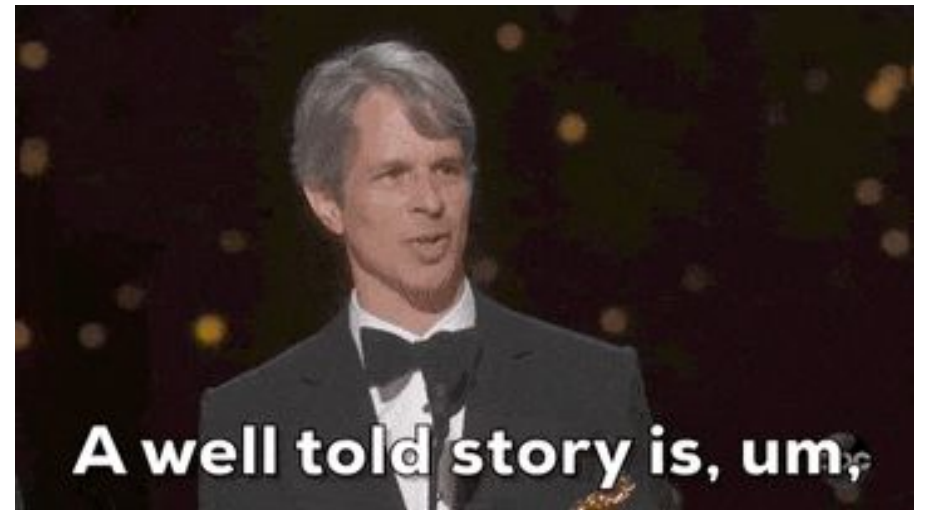
# Why Measure?

# Performance measurement

*(aka outcome/impact tracking, gathering feedback, evaluation, etc...)*

## The goal is to tell a story.

- Why are you texting?
- What story do you want to tell?
- Who do you need to tell it to?



# Start with the end in mind

**Imagine that your text campaign is wildly successful.**

**What is the headline?**

Article | [Open access](#) | Published: 15 February 2021

**Randomized controlled study using text messages to help connect new medicaid beneficiaries to primary care**

DOI: 10.5102/0102575720922237

Article reuse guidelines: [sagepub.com/journals-permissions](http://sagepub.com/journals-permissions)

© 2020 AERA. <http://eeepa.aera.net>

**Helping Parents Navigate the Early Childhood Education Enrollment Process: Experimental Evidence From New Orleans**

DOI: 10.30636/JBPA.32.183 • Corpus ID: 221950797

**Testing behavioral interventions designed to improve on-time SNAP recertification**

[Leonard M. Lopoo](#), [C. Heflin](#), [Joseph Boskovski](#) • Published 23 September 2020 • Economics, Environmental Science

# Why measure performance?

| <b>We have...</b>    | <b>...and we want to know</b>                               |
|----------------------|---|
| Goals                | Are we reaching our goals?                                  |
| Clients/participants | What improvements make the most sense to them?              |
| Limited resources    | Are we using our resources wisely?                          |
| Limited time         | Are we spending time on things that are working?            |
| A desire to improve  | How we can iterate/change our approach if it's not working? |

**Your time and effort have value!**

**Spend them on things that *work*!**

**How to get started:**  
Identify desired outcomes

**To determine if your texting  
program is working...**

...you first need to define what  
**“working”** means!

# Goals and Outcomes

**What do we want recipients to DO?**

- When they receive the text?
- After that?
- After that?

**WHY? What outcomes do we hope to achieve?**

- For recipients?
- For our staff or program?
- If these outcomes are things we're *already* trying to achieve, what do we want to be DIFFERENT/change?

# Indicators

What do we want recipients to DO?

- When they receive the text?
- After that?
- After that?



**How** might we know they've done this?

WHY? What outcomes do we hope to achieve?

- For recipients?
- For our staff or program?



**How** might we know these have happened?

# Hypothesis → Actions → Impacts → Indicators

*Hypothesis*

*Action*

**If we do x...the people we text will do y,**

*Impact*

**and we will get our desired outcomes.**

*Indicators*

**How will we know?**

# Baselines and Controls

**If any of your goals involve change (for example: *more* people will submit a benefit renewal form on time)...**

**you will not be able to assess success without baseline (current state) or control (similar group not texted) data.**

If you hope (hypothesize) that texting will reduce the time you spend on x, speed up recipient access to y, etc. you must have comparison data.

**Let's Try It:**

Draft a texting hypothesis

# A Hypothesis Framework

Goal: We want [specific desired outcome(s)].

Hypothesis: We believe that texting [specific sample of people] to take [desired action] will result in our desired outcome(s).

Goal: We want to prevent EBT card holders from experiencing lost cash benefits due to fraud.

Hypothesis: We believe that texting EBT card holders who have been identified as at risk for theft to cancel their card or reset their PIN will reach our desired outcome.

# Indicators of Success

**We will know we are successful when we see:**

- An increase in...
- A decrease in...

**We will know we are successful when we see:**

- Increase number of accounts who changes PIN or freeze account before funds are stolen
- Increase number of accounts who request a new card before funds are stolen
- Decrease amount of funds being stolen by fraudsters
- Reduce manual staff outreach efforts

# Texting Goals: What are some outcomes that texting could help improve?

- we want job seekers to feel informed
- we want a reduce in response time for job offers
- we want a potential victims of fraud to change passwords
- we want a complete application with all verification documents
- We want to people to report on why they were not approved for SNAP
- increasing enrollment

# Let's build a hypothesis together...

We want reduce in response time for job offers

We believe that texting a new hire to respond to our offer/ask questions by going to a specific url will result in our desired outcomes.

We will know we are successful when we see:

- reduction in time between day text is sent and day new hire responds to the URL
- Decrease effort of follow-ups from hiring team, time spent following up

# Let's build indicators together...

We will know we're successful when we see...

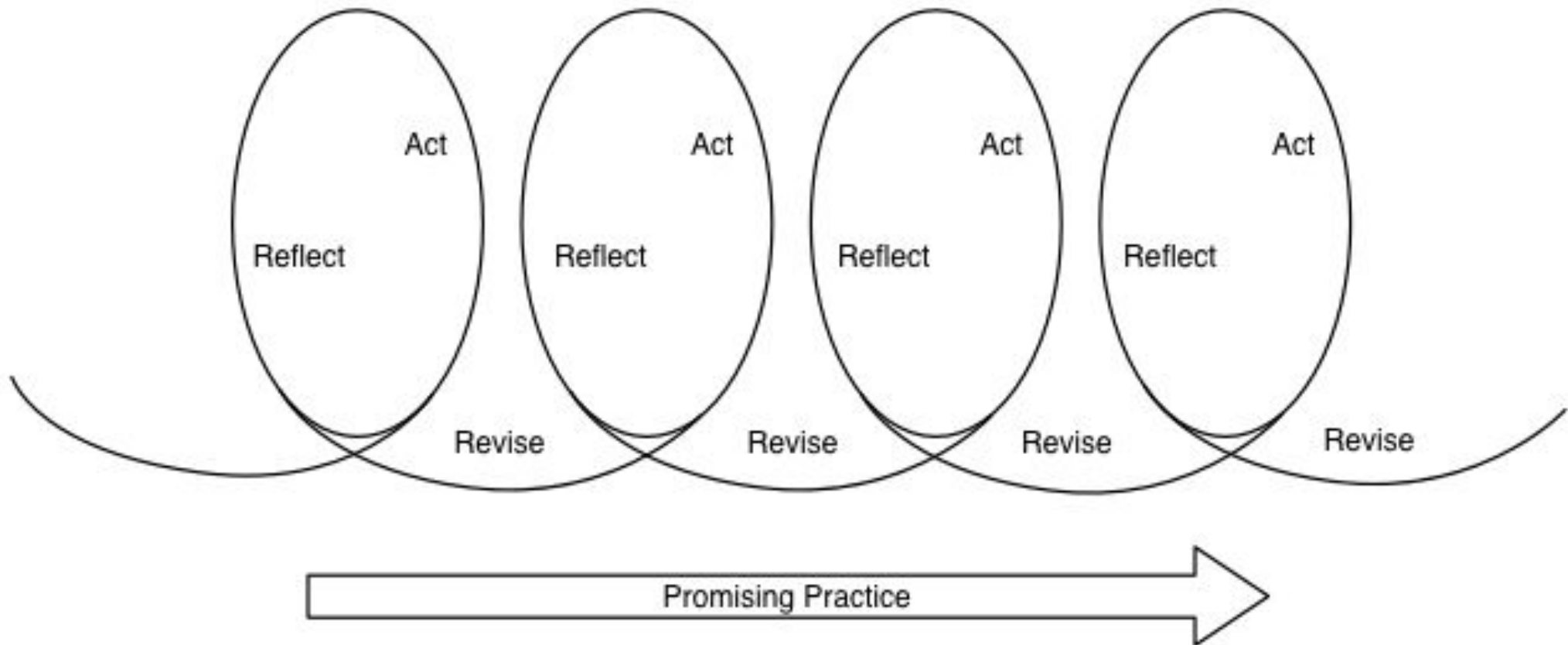


*Tip: Indicators can focus on outcomes for both clients and program staff!*

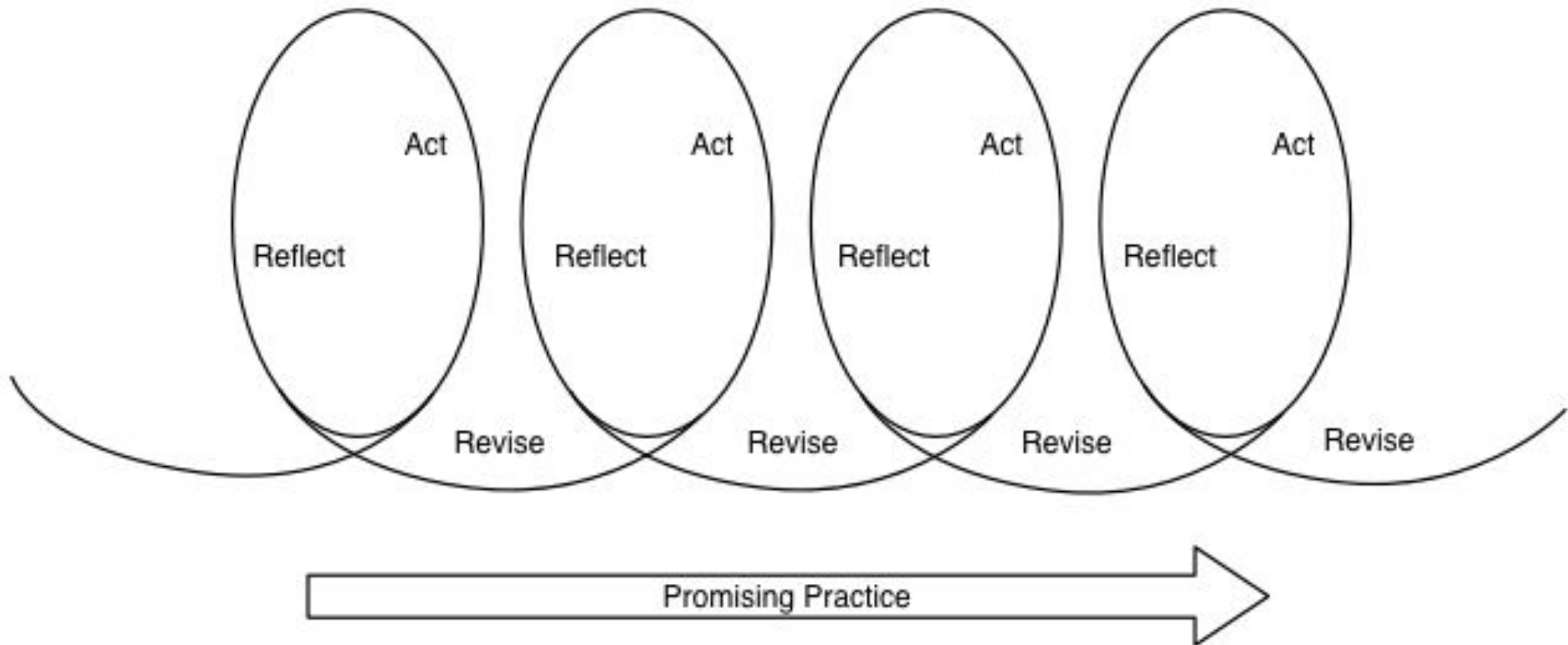
**Is it working?**

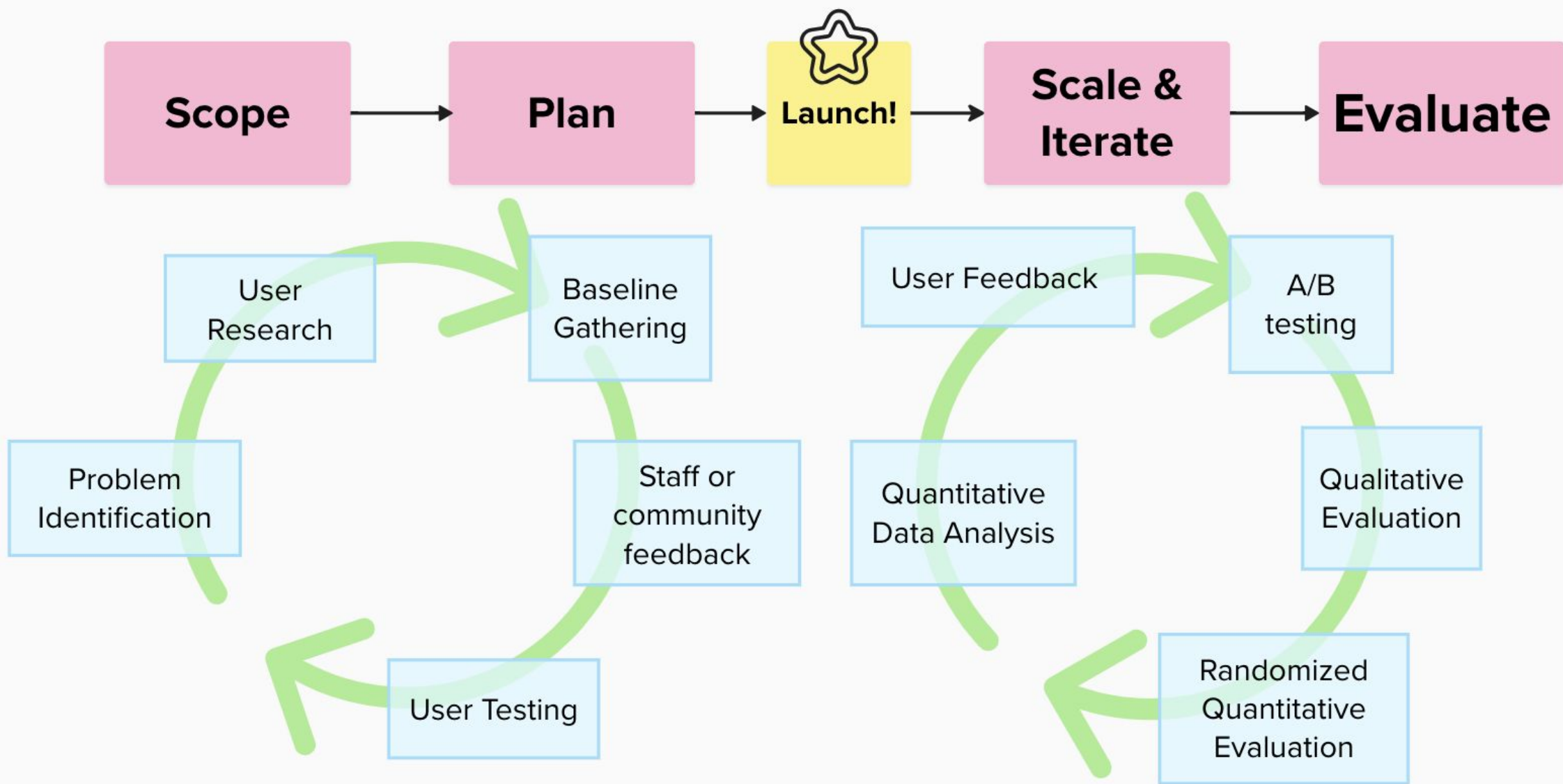
How will we measure...

The **process** is continuous, and can happen from the very beginning.



**Methods** will change based on what you want to learn and where you are in your process.





**Poll question:** What approaches are you most interested in learning how to operationalize in part 2?

1. Problem Identification
2. User Research
3. Baseline Gathering
4. User Testing
5. Staff & Community Organization Feedback
6. User Feedback
7. Quantitative Data Analysis
8. Qualitative Evaluation (highschool math)
9. A/B Testing
10. Randomized Quantitative Evaluation (College/Data Science math)

**(scratch, to be deleted before  
next week!)**

**Brainstorm for part 2...**

# Agenda/Overview of Part 2

Case Study examples? - call for stories?

Deeper dive into indicators and data?

# Step 1: Turn your Hypothesis into a Research Question

*We want text recipients to...[do thing] [not otherwise done, earlier, more accurately, etc.]*

*...so that they...[achieve x, provide y, avoid z, more/less often, faster, etc.]*



Does texting [group] [increase/decrease, etc.] [desired outcome]?

## Step 2: Turn your Research Question into Indicators

# Metrics and Variables

We need to make sure we have the following information to answer our research question:

## **Independent Variables**

Conditions we want to observe/record for each potential recipient:

- Was the recipient texted?
  - Was the text received?
  - Date text was received
- Demographics?
- Case info/dates to track

## **Dependent Variables**

Results/behaviors to help us answer our research questions:

- Action started
- Action completed
- Outcome

# Where to look? Available Data

**Feedback from  
text receivers or  
staff**

**Data from  
your texting  
provider**

+

**Data from the  
text itself (hard)**

+

**Data from  
administrative  
reports**

Time, date

Delivered or  
Failed

Message content

Click a link that  
is tracked

call a specific  
phone number

How the actions  
you want  
someone to take  
show up in your  
data