

# Text to Connect

---



**Evaluation of your text messaging program to  
reduce SNAP churn**

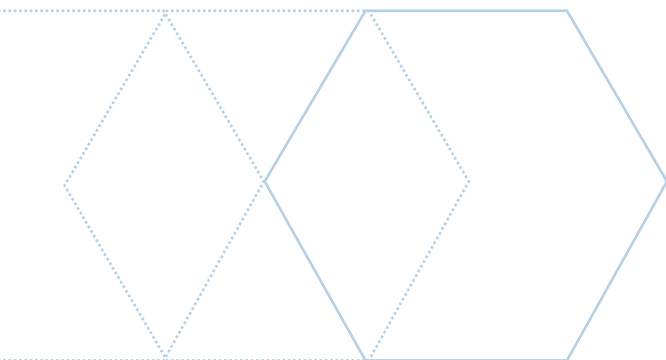


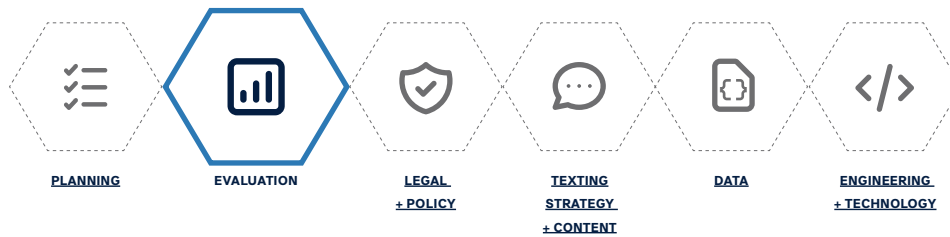
# Evaluation of your text messaging program to reduce SNAP churn

By texting directly with clients about critical deadlines, you will increase the number of those who recertify successfully, boosting the chances of experiencing the security and stability of uninterrupted benefits access, while improving your organization's workflow and efficiency.

Now it's time to design an evaluation plan that will set you up to assess and communicate the impact of your text messaging program. Building evaluation into your program from the onset will pay dividends immediately and in the future. **If you are a research and evaluation specialist, this guide is for you.** Benefits include:

- + **Clarifying** program objectives and identifying gaps
- + **Informing** necessary data sharing agreements and building data exchange pathways before texting starts
- + **Understanding** what elements of your outreach strategy are working for whom and under what conditions, allowing you to make targeted, evidence-based adjustments
- + **Sharing** a compelling story of success to maximize future programming and resource requests



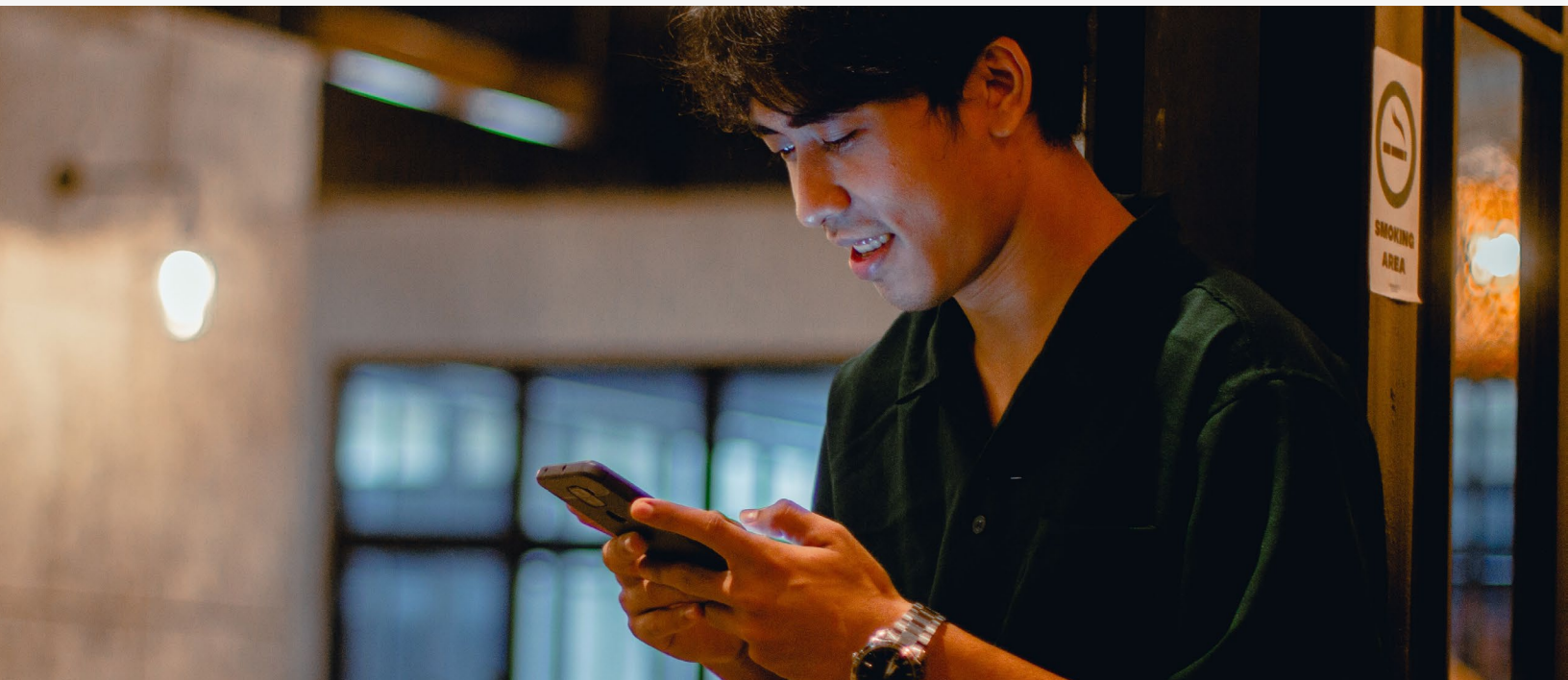


This guide is part of a series produced by the [Beeck Center for Social Impact + Innovation at Georgetown University](#) and the [Benefits Data Trust](#), and is designed to help you implement a text messaging program to reduce SNAP churn. Click on any of the links in this graphic to see a different workstream. Access the entire [guidebook](#).



**Inside this document you'll find guidance on:**

- + [Evaluation design](#), including overall structure and questions about controls and comparisons
- + Examples of [evaluation questions](#), with corresponding indicators
- + An appendix with [sample data dashboards](#)



## Evaluation Design

To plan your evaluation, you will want to bring together your evaluation and research specialists, project manager, benefit program specialists, content and outreach specialists, and data team. If possible, representative field staff and clients should be consulted about evaluation content and the ways data will be collected. Evaluation is a skilled profession,<sup>1</sup> and a trained evaluator or researcher can design an evaluation plan that will let you gain fine-grained insights about the effectiveness of your text messaging program in reducing churn. The evaluation process may also allow you to identify what works generally, which can inform how you might scale your text messaging program.

If your team's capacity to conduct evaluation is limited, at a minimum we encourage your team to:

- + Record the rates of timely recertification before and after texts are sent to clients to note any difference
- + Record how many clients successfully receive and interact with texts shortly after they're sent for quality assurance
- + Conduct simple qualitative evaluation by using some of the methods described in the [Planning guide](#) to consult with field staff about client response, changes to the volume of questions about recertification, and more

A more complete evaluation plan should include:

- + Your agency's objectives for the text messaging program (see the [Planning guide](#))
- + A detailed description of what you hope to learn, including the evaluation questions that you intend to answer during the evaluation process
- + An analysis plan that details what data sources you will need, how you will collect that information, and what types of analysis you will do
  - This includes program outcome and impact measures (e.g., percent increase in rates of timely recertification, percent increase in rates of complete and accurate recertification materials), as well as
  - Implementation and process measures<sup>2</sup> (e.g., text message receipt rate)
- + Details on how you will use the evaluation results

You can leverage a mix of quantitative and qualitative evaluation methods to measure impact. An evaluator, researcher, or data analyst can advise on evaluation design and methods to ensure that you are collecting useful data that will answer your questions.

---

1. American Evaluation Association. Values of the American Evaluation Association. (Accessed 8/27/21). <https://www.eval.org/About/About-AEA>

2. You may have heard process measures and process evaluation be called process improvement, continuous improvement, quality improvement, quality assurance, or quality control



## Control Groups

An important and early decision you'll need to make involves whether to include a control group as part of your evaluation, and therefore your text messaging program design. Using a control group, or a group that does not receive text messages during the study period, can help your team determine if the text messaging program is correlated with an increase in recertification/reduction in churn. For example, Benefits Data Trust used control groups in a text messaging program to learn that WIC enrollment increased following text messages to likely eligible families.<sup>3</sup>

Using a control group can strengthen the reliability and validity of your evaluation by providing a counterfactual—essentially, what happens to a near-identical group of clients due for recertification at the same time but who don't receive text messages. If you use a control group, you'll want to make sure you're selecting a group that is as similar as possible to the group of clients that will receive text messages so that you can maximize certainty that any differences in outcomes observed between the groups is indeed due to the text messages, rather than another unobserved variable.<sup>4</sup>

If you test the effectiveness of a text message program while using a control group, all clients due for recertification can still receive the same type of notifications they do currently—for instance, letters sent through postal mail. The only difference would be that the clients who receive text messages now have text messages as an additional source of information.

Some programs decide not to use control groups for good reasons. There may be urgency to get a large number of clients recertified, such as when COVID-19 recertification waivers expire. Agencies may also be limited by staffing and resources to manage a more sophisticated evaluation process and analysis, thus making the use of a control group too complicated. The decision depends on the circumstances of your agency. One alternative to using control groups that might be feasible, depending on your state's operating structure, is to pilot text messaging in one or more counties, while the rest of the state continues receiving the usual recertification notifications. Then, over time, you could expand the text messaging program state-wide.

If you're considering using different text messages or frequency of messages to evaluate what works better, you can read about precedents for that work in the [Texting Strategy and Content guide](#) and in the resources listed in the Appendix of the [full guidebook](#).

The following steps offer basic guidance to help your team plan what questions to use to guide your evaluation.

---

3. Maneely, J., Neuberger, Z. (2021). Using Data Matching and Targeted Outreach to Enroll Families with Young Children in WIC. Center on Budget and Policy Priorities and Benefits Data Trust. <https://www.cbpp.org/research/food-assistance/usingdata-matching-and-targeted-outreach-to-enroll-families-with-young>

4. For more background on experimental design, see Quantitative Design Strategies and other design methodology resources, or consult with evaluation experts. Source: Begun, A. Research & Statistics for Understanding Social Work Interventions; Module 3 Chapter 2: Quantitative Design Strategies. The Ohio State University College of Social Work; Pressbooks. (Accessed 8/27/21). <https://ohiostate.pressbooks.pub/swk3402/chapter/module-3-chapter-2/>

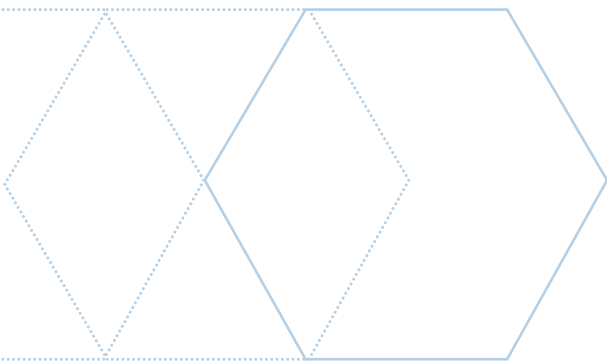
## Evaluation Goals and Questions

Identify the overarching goals of the evaluation, returning to the objectives your agency has for the text messaging program discussed in the [Planning guide](#).

For outcome evaluation, you will consider outcomes and impacts of the text messaging program, like whether the clients who get text messages have different recertification rates than those who don't, or if some geographic or demographic groups have different changes to recertification rates. Outcome evaluation is something that happens at the end of your program cycle, but requires ongoing data collection throughout the entire life of the program. For process evaluation, you will consider the early activities and outputs that show how well the program steps are executed, like measuring if clients actually receive the text messages that get sent to them, and if not, why. Process evaluation is important during initial phases of outreach, especially when beginning a new process. It is very helpful when trying to understand if your approach is working from a technical perspective and is frequently cyclical (if something is not working as planned, tweak and evaluate again to see if there is an improvement). If time dedicated to carrying out evaluation activities is minimal, it is recommended to focus on only a couple of evaluation goals at a time.

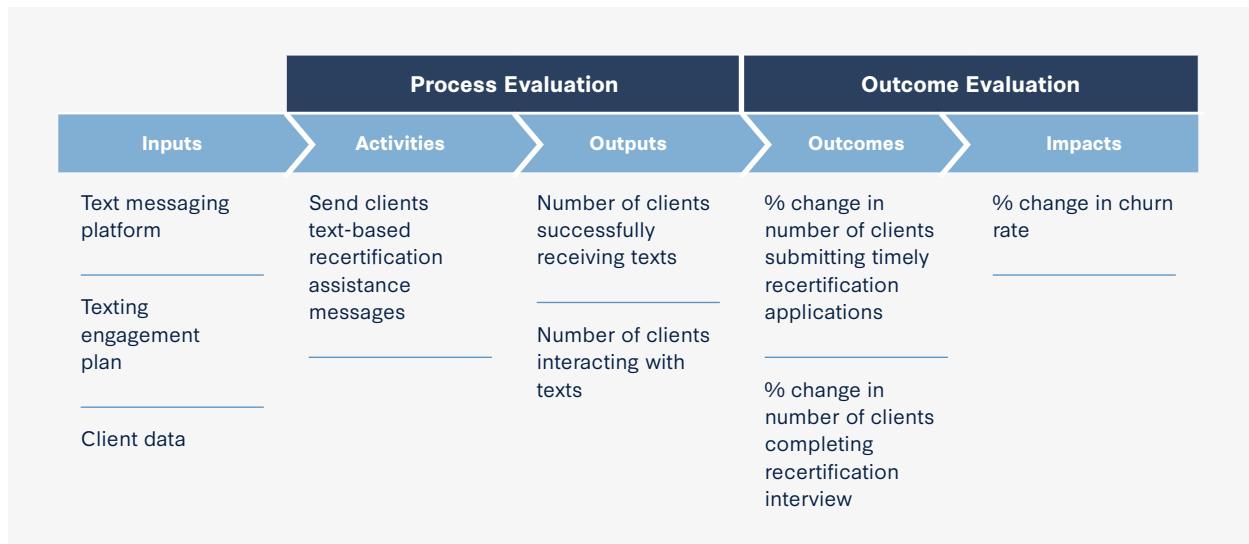
The next step is to identify the specific questions you want to answer within the identified goals. These questions can be phrased in a variety of ways, but each question needs a clearly defined way to be measured. Data sources for these questions can include information that is quantitative, qualitative, or both. Once you draft the questions, your evaluation team can decide what methods are most appropriate to answer them.

The following table provides examples of questions and potential approaches to measurement. Be sure to consult with your data team about the feasibility of receiving these measures at the necessary timepoints for evaluation, and that they can be included in any data-sharing agreements. (See the [Data guide](#) for more detail.)



Question	Potential Measure
How many SNAP participants are receiving the text messages?	Delivery metrics tracked in text messaging platform
How many and where are participants opting out of messages?	Opt-out metrics tracked in texting platform
Do text messages increase the rate of timely recertifications?	Number of recertifications completed ahead of deadline
Do text messages lead to earlier recertification form submissions?	Median days recertification forms submitted before certification period ends
Do text messages increase the rate of complete and accurate recertifications?	Number of complete and accurate recertification forms and verification returned
Do text messages free up field staff time to focus on more complex cases?	Volume of and reason for call center calls and field office visits, qualitative assessment by field staff
Do text messages improve the recertification experience for clients?	Customer experience survey, qualitative assessment by participants, qualitative assessment by eligibility workers
Do different types of messages lead to differences for any of the measures above?	Above measures tracked for different types of messages
Does the timing of text messages (e.g., time of day or number of days before deadline) lead to differences for any of the measures above?	Above measures broken down by delivery times tracked in texting platform
Are there differences across race/ethnicity, age, or geographic region for any of the measures above?	Above measures broken down by selected demographic variables

Creating a logic model can help you assure that all the evaluation questions you’re asking relate logically to the planned work of your program and your agency’s objectives. A logic model can also demonstrate the rationale for the need to access particular types of data and resources. Here is an example logic model:



For additional information about creating and using logic models, consult with your evaluation team or resources such as the [W.K. Kellogg Foundation Logic Model Development Guide](#) and [Logic Models for Program Design, Implementation, and Evaluation](#).

Similarly, a dashboard can help your evaluation and texting teams track and monitor short term outputs for quality assurance and program outcomes and impacts over time. See [the Appendix](#) for a sample evaluation dashboard. Your data and technology teams may be able to create or source dashboard metrics from an analytics tool as they establish the texting platform; check with them early to see what’s possible. For more information, see the [Engineering and Technology guide](#).





### **Using and Sharing Evaluation Learnings**

The best evaluation is not useful if learnings are not collected and shared. Part of the evaluation planning process should include an assessment of who evaluation findings will be shared with and for what purposes. For example, you may want to:

- + Provide project managers with real-time information on text message delivery rates so any issues can be addressed immediately
- + Report to agency leadership or the public whether the project has improved racial equity in rates of successful recertifications
- + Report to field staff how texting has reduced recertification caseload spikes
- + Report to clients engaged in user testing how their contributions shaped the text messaging program
- + Inform future project decisions and project improvement efforts

Again, refer back to the objectives your agency set out for the text messaging program to inform what findings take priority for particular audiences (see the [Planning guide](#)).

# Appendix

## Sample Evaluation Dashboards

### Outreach Insights

#### Total Outbound Texts

Week	Total Outbound Messages
Week 1	12,019
Week 2	11,483
Week 3	12,687

#### Weekly Delivery Rate

Week	Total Outbound Messages	Delivered Rate	Sent Rate	Failed Rate	Undelivered Rate	Total Known Delivery Rate
Week 1	12,019	80.3%	12.8%	0.0%	6.9%	100.0%
Week 2	11,483	79.9%	12.4%	0.1%	7.6%	100.0%
Week 3	12,687	81.3%	12.4%	0.1%	6.2%	100.0%
<b>Total</b>	<b>94,283</b>	<b>82.2%</b>	<b>11.6%</b>	<b>0.1%</b>	<b>6.2%</b>	<b>100.0%</b>

### Race & Ethnicity Engagement

Race & Ethnicity	Number of Client Replies	Engagement Rate
Asian	1,594	2.5%
Black	38,438	60.3%
Native American	1,211	1.9%
Pacific Islander or Alaska Native	446	0.7%
Hispanic	4,335	6.8%
White	22,036	34.6%
Unknown	19	0.0%

### Race & Ethnicity Recertification

Race & Ethnicity	Number of Clients	Engagement Rate
Asian	9,253	2.7%
Black	205,283	59.9%
Native American	61,69	1.8%
Pacific Islander or Alaska Native	1,714	0.5%
Hispanic	25,018	7.3%
White	120,188	35.1%
Unknown	103	0.0%

### Age Engagement

Age	Number of Client Replies	Engagement Rate
18-39 yrs old	34,294	53.8%
40-59 yrs old	20,844	32.7%
60+ yrs old	8,605	13.5%
<b>Total</b>	<b>63,744</b>	<b>100.0%</b>

### Age Recertification

Age	Number of Clients	Engagement Rate
18-39 yrs old	166,557	53.8%
40-59 yrs old	120,291	32.7%
60+ yrs old	5,582	13.5%
<b>Total</b>	<b>342,709</b>	<b>100.0%</b>

## Demographic Insights Cont.

### Language Engagement

Language	Number of Client Replies	Engagement Rate
English	61,513	96.5%
Other	2,167	3.4%
Spanish	64	0.1%
<b>Total</b>	<b>63,744</b>	<b>100.0%</b>

### Language Recertification

Language	Number of Clients	Engagement Rate
English	327,287	95.5%
Other	11,995	3.5%
Spanish	3,427	1.0%
<b>Total</b>	<b>342,709</b>	<b>100.0%</b>

### Rural vs. Urban Engagement

County Type	Number of Client Replies	Engagement Rate
Urban	43,792	68.7%
Rural	19,894	31.2%
Unknown	57	0.1%
<b>Total</b>	<b>63,744</b>	<b>100.0%</b>

### Rural vs. Urban Recertification

County Type	Number of Clients	Engagement Rate
Urban	230,986	67.4%
Rural	101,442	29.6%
Unknown	10,281	3.0%
<b>Total</b>	<b>342,709</b>	<b>100.0%</b>

### **About the Beeck Center for Social Impact + Innovation**

The Beeck Center is an experiential hub at Georgetown University that trains students and incubates scalable, leading edge ideas for social change. We believe impact at scale requires the courage to think and behave differently. Our work centers on investing in outcomes for individuals and society. We equip future global leaders with the mindset to promote outcome-driven solutions, using the tools of design, data, technology, and innovation. We convene actors across the public, private, and civic sectors to advance new tools, frameworks, and approaches necessary to achieve these outcomes.

### **About Benefits Data Trust**

Benefits Data Trust (BDT) is a national nonprofit organization based in Philadelphia that uses these modern approaches to support government agencies in transforming how their residents access the social safety net. In 2017, BDT began a SNAP recertification text messaging program in New York City, and now partners with several states to implement similar programs suited to their needs.

### **About This Guidebook**

Together, the Beeck Center and BDT authored this guidebook to detail practices so more states and local agencies can use text messaging to reach the people they serve with important, timely, and easy to understand guidance so people don't lose their SNAP benefits when they need them most. While we focus on the use case of SNAP recertification, we hope this content might be useful for anyone using text messaging to improve safety net benefits delivery in other ways.

This guidebook is part of a larger initiative by the Beeck Center for Social Impact + Innovation at Georgetown University to document innovations in social safety net benefits delivery driven by human-centered service design, data-informed practices, and responsive technology with a goal of spreading proven practices more widely. You can find other resources on maintaining public benefits and more on the [Digital Benefits Hub](#).

Please contact us with any thoughts, questions, or suggested additions to this guidebook. We can be reached via email at:

digitalbenefits@georgetown.edu  
partnerships@bdtrust.org