

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!





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?**

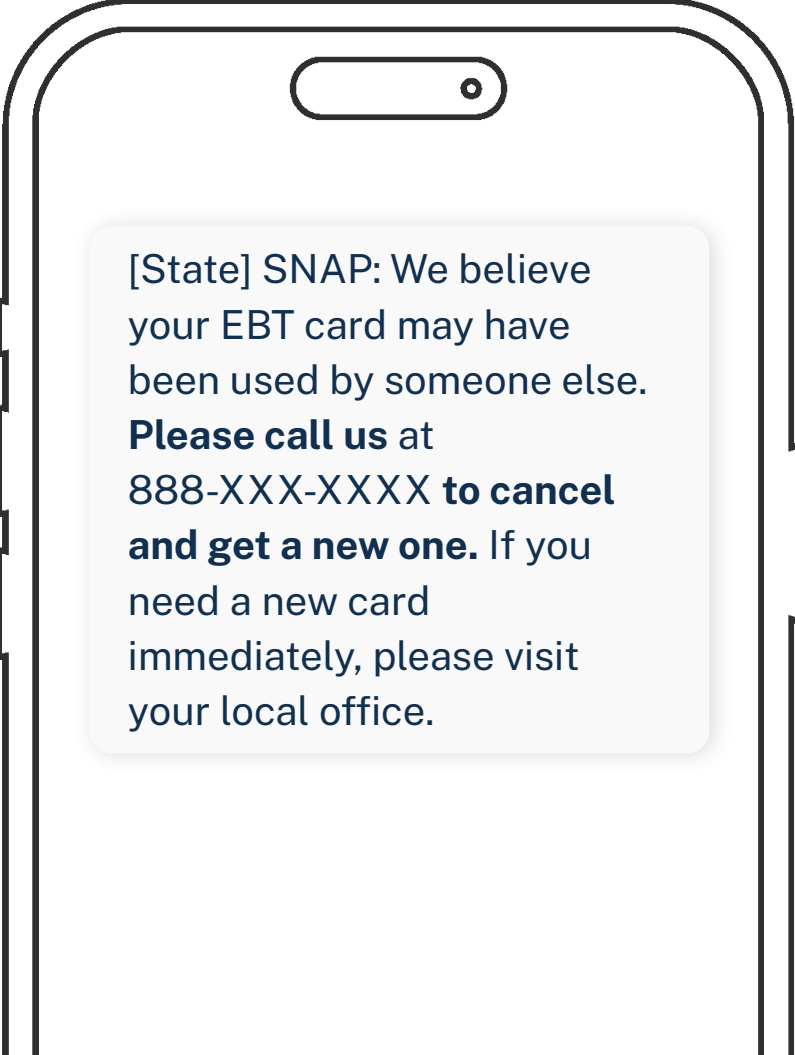
**How do you know what
you're doing is working?**

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)**



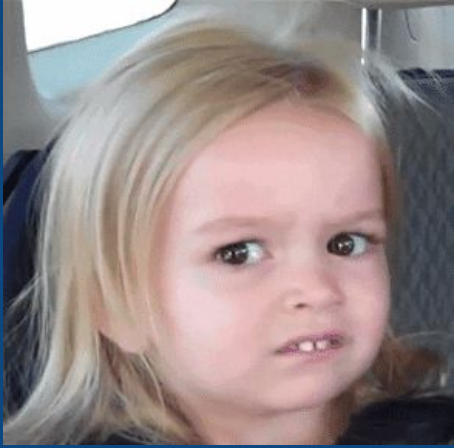
[State] SNAP: We believe your EBT card may have been used by someone else. **Please call us at 888-XXX-XXXX to cancel and get a new one.** If you need a new card immediately, please visit your local office.

Texting = Program Success

Come off mute/throw in chat:

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





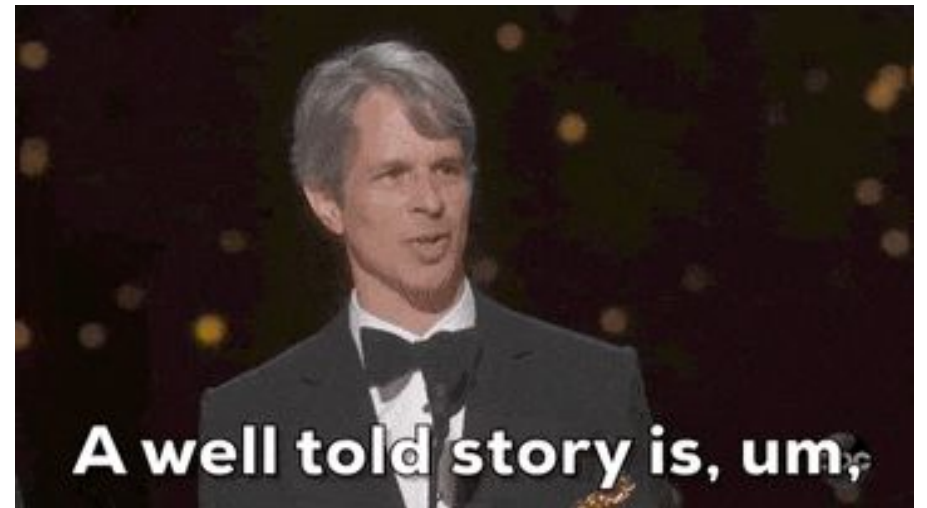
Why Measure?

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: 10.5102/0102575720922257

Article reuse guidelines: sagepub.com/journals-permissions

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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?

We have...	...and we want to know
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...

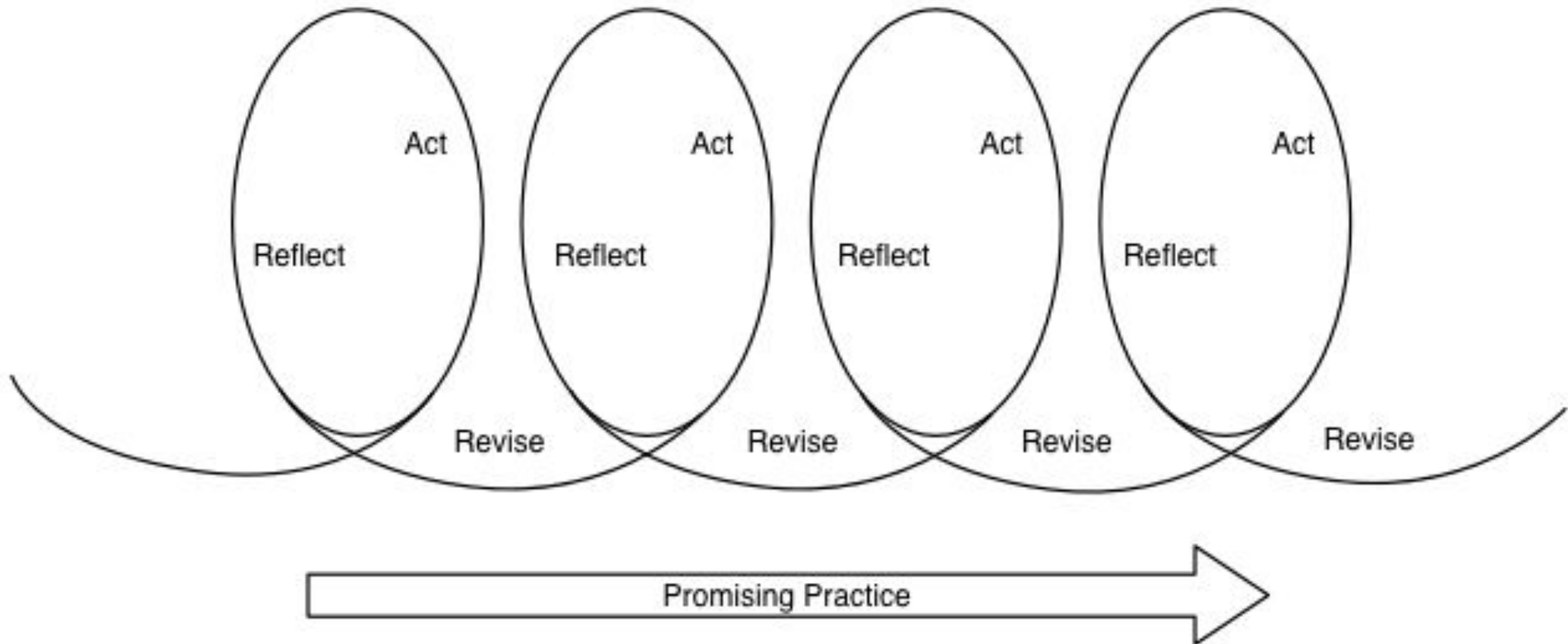


Tip: Indicators can focus on outcomes for both clients and program staff!

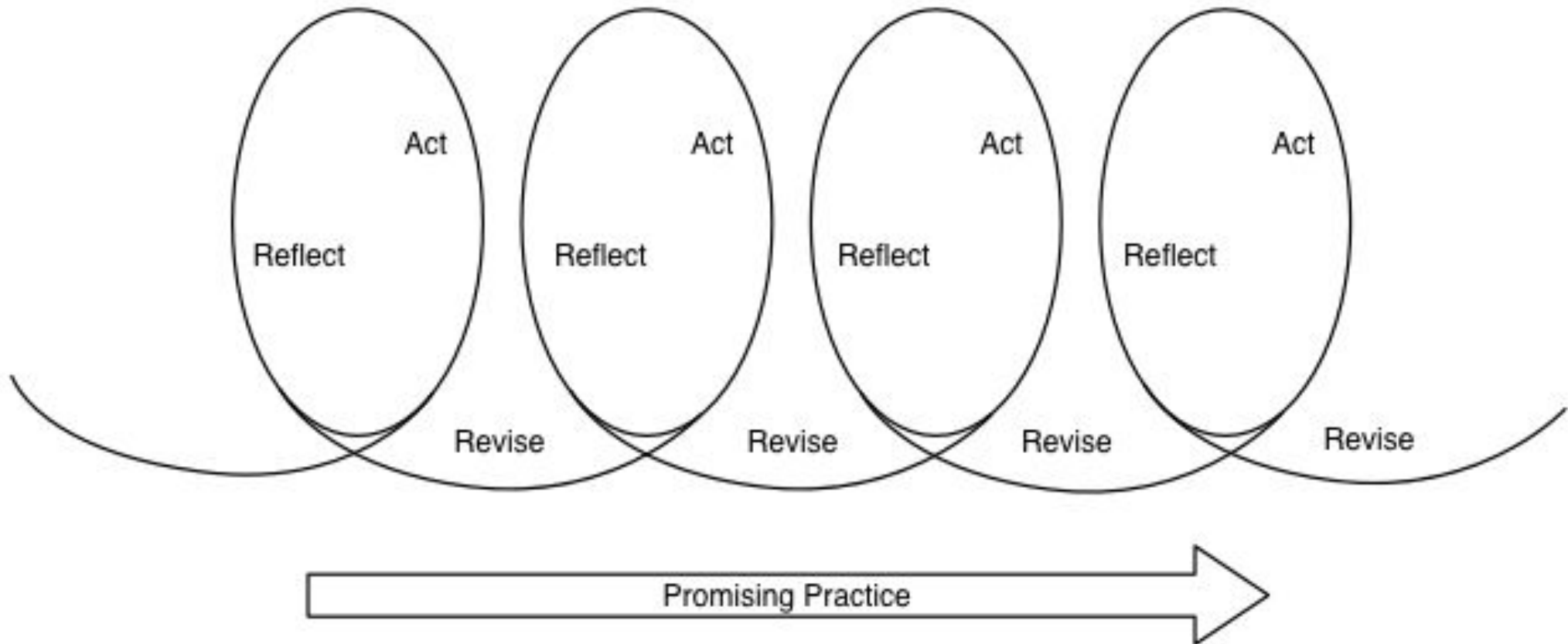
Is it working?

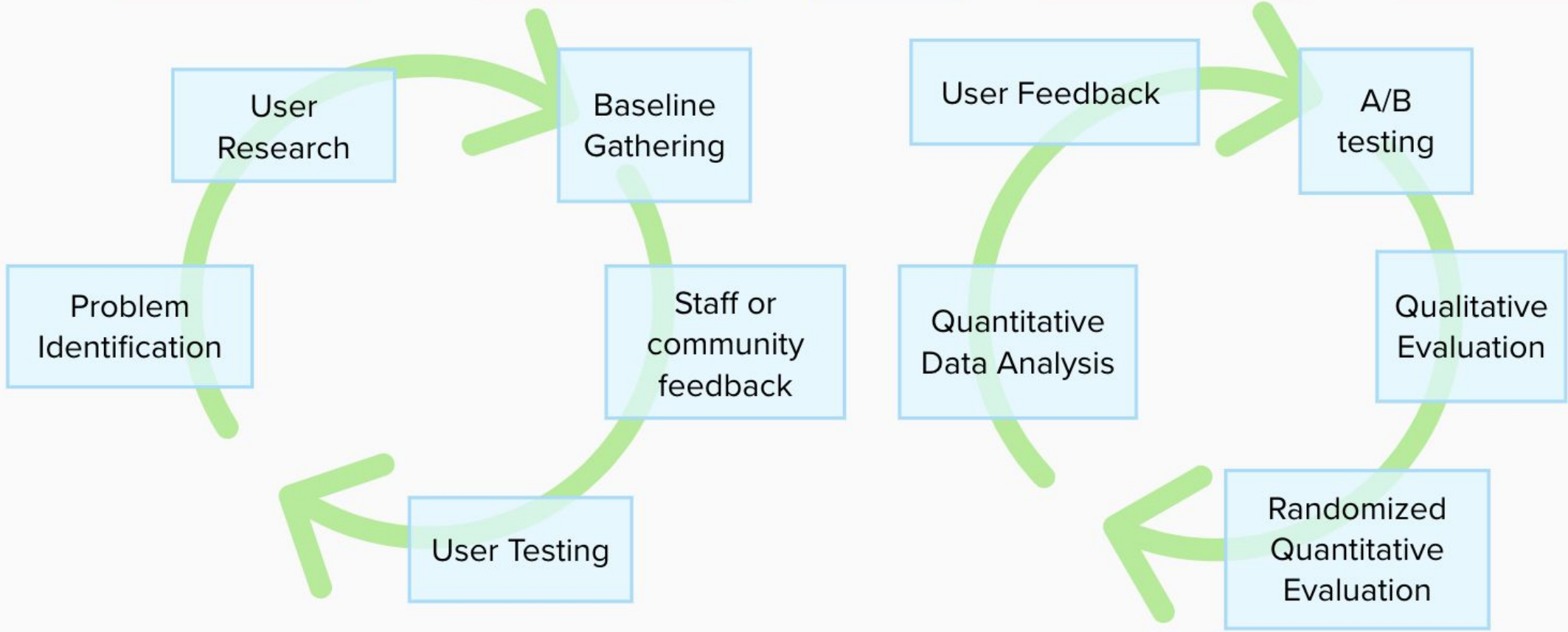
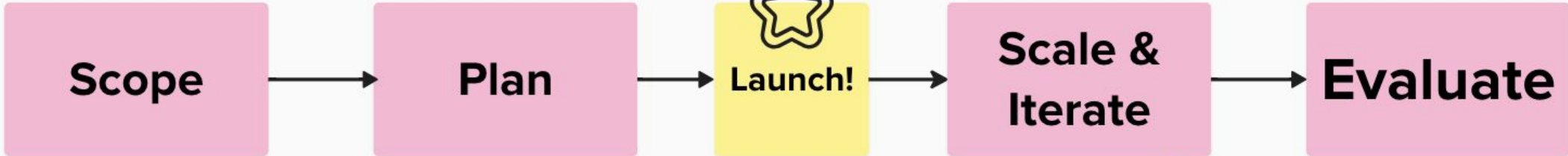
How will we measure...

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 :D)
9. A/B Testing
10. Randomized Quantitative Evaluation (College/Data Science Math)