

Using Text Message Outreach to Reduce SNAP Churn

**SECTION 4**

# TEXTING STRATEGY + CONTENT

## Defining Your Texting Approach and Texting Engagement Plan

October 2021

By Katie Sullivan, Sara Soka, and Keith Barnes

**beeckcenter**  
social impact + innovation

 **bd**t  
BENEFITS DATA TRUST

# About This Section

This is one section from the guidebook [Using Text Message Outreach to Reduce SNAP Churn](#), produced by the [Beeck Center for Social Impact + Innovation at Georgetown University](#) and [Benefits Data Trust](#).

The goal of the guidebook is to give state and local government agencies practical advice on how to scope and design a text messaging program to support SNAP clients through the recertification process. You can develop and implement your text messaging program in-house or partner with a vendor, and we offer guidance based on both scenarios. While we focus on the use case of SNAP recertification, we hope this content might still be useful for anyone using text messaging to improve safety net benefits delivery in other ways.

To view or download the entire guidebook, as well as other individual sections, visit: <https://beeckcenter.georgetown.edu/report/using-text-message-outreach-to-reduce-snap-churn/>

## Table of Contents

### **Defining Your Texting Approach and Texting Engagement Plan**

- One-Way Messaging
- Two-Way Messaging
- Consent
- Choosing the Right Type of Number for the Job
- Best Practices for Texting
- Texting Strategy + Content Roadmap

# Defining Your Texting Approach and Texting Engagement Plan

Once you've identified your objectives and mapped your resources, you can select a texting approach to fit those needs. One of these common approaches will likely be well suited for your program:

- **One-way messaging:** Great for notifications, reminders, and information blasts. One-way automated text messaging is the simplest approach and requires the least amount of effort and resources to set up.
- **Two-way messaging:** The interactive nature of two-way texting allows you to provide real-time support to clients. Two-way automated messaging is good for handling frequently asked questions, is slightly more complicated to set up than one-way automated messaging, but nearly as easy to maintain. Introducing a human element (i.e., caseworkers and call center staff) requires more significant operational resources, but enables individualized support.

Once you've decided on your texting approach, you can start crafting your texting engagement plan. A texting engagement plan encompasses what content you text, when you'll text, and how many texts you'll send. As you design your texting engagement plan, keep in mind the information you want to convey to clients, the actions you want clients to take, and the level of interaction you want to build in.

You'll want to design and user test text messages to ensure they are understandable, simple, accessible, appropriate for clients in different circumstances, and are framed in a way that establishes trust and credibility with recipients. Here are some resources that can help (full links are in the Additional Resources section of the full guidebook's Appendix):

- **[Plain Language Guidelines](#):** Practical advice on writing clear communications from the U.S. government.
- **[Limited English Proficiency Translation Guides](#):** State and federal resources on translation and multilingual communications.
- **[Targeted Text Message Outreach Can Increase WIC Enrollment, Pilots Show](#):** On page 14 of this report co-authored by Benefits Data Trust and the Center on Budget and Policy Priorities, you'll find examples of text messages informed by behavioral science. Behavioral nudges<sup>1</sup> are context-dependent, and texting engagement plans should undergo user testing.
- **[LA'MESSAGE Pilot: Text Reminders in Louisiana](#):** On page 23 of this report by Code for America, the authors describe user testing text messages with social safety net benefits clients.
- **[Usability Testing](#):** Guidance from the federal government for testing a service, like your texting engagement plan, with clients before it's implemented.

---

<sup>1</sup> For more on the topic of behavioral nudges, see Thaler, R., Sunstein, C. & Balz, J. (2010). Choice Architecture. <https://ssrn.com/abstract=1583509> or <https://www.sas.upenn.edu/~baron/475/choice.architecture.pdf>

It's important to solidify your text messaging approach early because it directly informs your data strategy and technology decisions. Once you've narrowed in on what you're trying to accomplish with the text messaging program and the approach you want to take—one-way automated, two-way automated, or two-way automated with field staff support—you can work on designing and user testing the specific content and mechanics of your texting engagement plan concurrently with other workstreams (such as building a data pipeline and setting up a texting platform).

## One-Way Messaging

One-way automated text messaging is a great way to send SNAP clients reminders about upcoming recertification deadlines, interviews, and verification documents. It can also be used to notify clients about their case status or relay other timely information. The barrier to entry for one-way automated messaging is low because it is relatively simple and inexpensive to set up and maintain, so it can be a good first step when piloting a new text messaging program.

As a best practice, you will want to set up your texting platform to auto-send SNAP clients an initial reminder as soon as their recertification window opens. This ensures they return their form with ample time for sequential steps like completing their interview and submitting verification documents.

You should also prepare a set of follow-up texts to nudge clients who haven't taken action. Timing of these messages should consider the client's options for returning their renewal form. For example, if only a paper form is supported, reminding clients two weeks before their deadline may be too late to complete, send, and process their materials.

Interview and verification reminders can be triggered as clients move through the process, with follow-ups scheduled a couple of days before the interview date and recertification deadline. Keep in mind that these types of messages require insight into where a client is in their recertification process, so you'll need to make sure that your program database has up-to-date information about client case statuses.

## Sample one-way text messages for SNAP recertification

### Sample recertification reminder

*(Start of recertification window or 60 days before deadline)*

This is [Agency] letting you know it's time to renew your SNAP benefits. Look out for your form in the mail or submit online at [site].

To end texts reply STOP

### Sample follow-up

*(2 weeks before deadline)*

Your SNAP renewal is due in 2 weeks. To keep your benefits, go to [site] to submit your form.

Need help? Call us at [phone number]. To end texts reply STOP

### Sample interview reminder

*(Once form is submitted)*

Your SNAP interview is scheduled for [date] at [time]. A case worker will call you at that time. Need to reschedule or have questions? Call [phone number]

### Sample verification reminder

*(Once interview is complete)*

The last step to renew your SNAP benefits is to submit your documents. You can upload them at [site], mail them to [address], or drop them off at your local SNAP office.

Need help? Call [phone number]. If you've already submitted your documents you can ignore this message.

## Two-Way Messaging

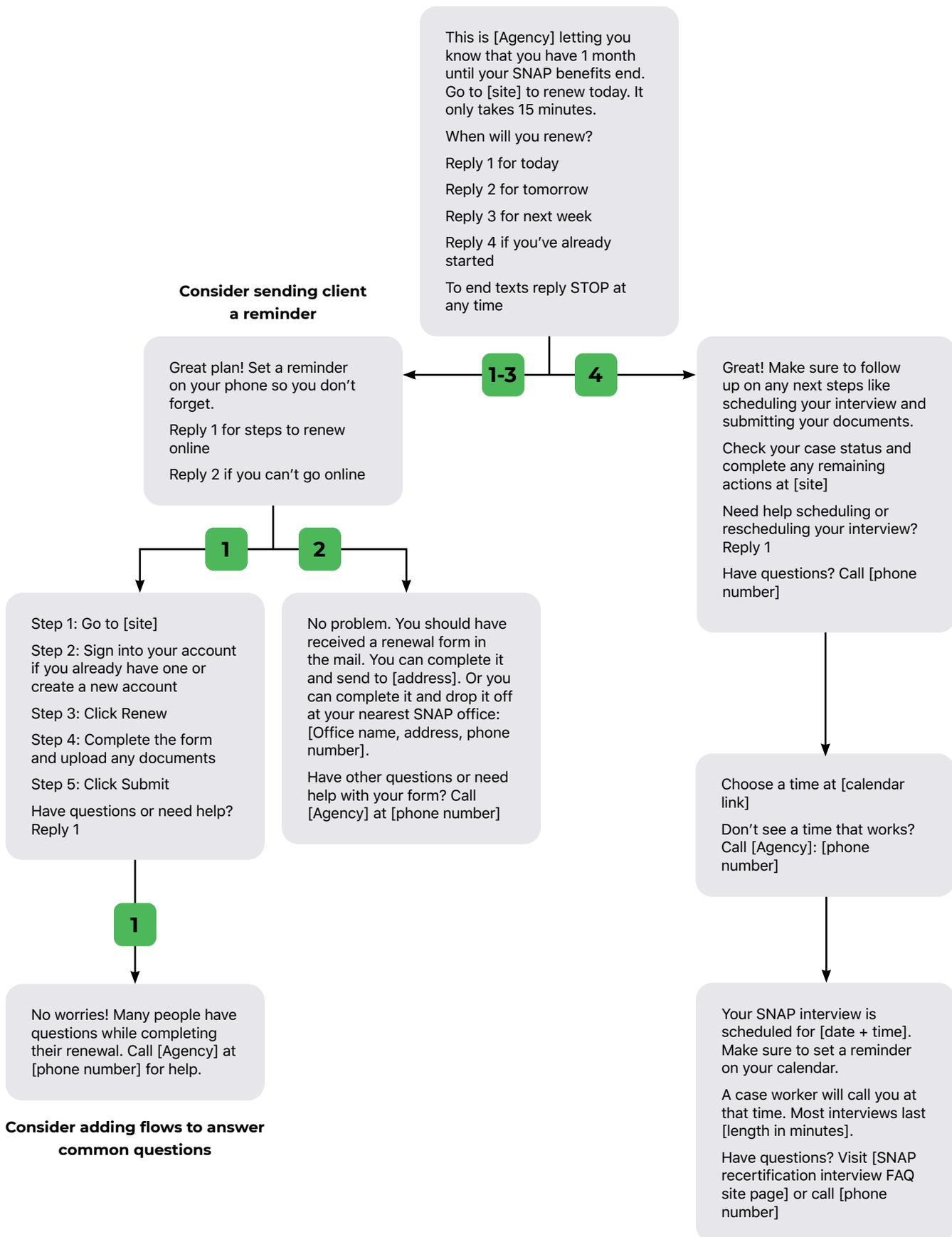
Two-way text messaging is great for providing an additional layer of support to clients. While it requires more resources to set up and maintain, the dynamic nature allows you to better serve client needs. Keep in mind that the more interactions and layers you build in, the more time it will take to set up and test.

A common use case for two-way messaging is creating an automated flow that answers frequently asked questions and directs clients to resources as they navigate the process. This can help reduce call volume, free up staff time to focus on helping clients with more complex cases, and improve completion and accuracy of documents. Running an automated two-way messaging system will require extra time from content designers and engineering to set up. That said, once it's up and running, maintenance is as lightweight as one-way messaging.

If you have the resources to add a human element, you can create a two-way texting system where field staff provide individualized support to clients in real time. This could include answering complex questions, providing application assistance, or following up with clients about elements of their case as it's being processed.

With additional engineering resources, you could even integrate a way for clients to schedule interviews or submit verification documents over text (possibly by providing a link to a secure, mobile-responsive website where clients can upload documents). Since text messaging itself is not a secure method of communication, make sure you work closely with your legal/policy team and IT security to understand the federal, state, local, and agency regulations around sending and receiving sensitive information over text to ensure you are complying with security and privacy laws.

## Sample two-way automated texting engagement flow for SNAP recertification



## Consent

As a legal matter, before you can begin texting clients, you must get their consent. Although if a state agency is sending the text messages itself, the FCC has ruled that the consent requirement of the TCPA does not apply (see the Legal and Policy section of the full guidebook for more details). Regardless, getting consent is recommended as an ethical best practice. As a matter of law, make sure to review federal, state, and local regulations that affect how you obtain client consent. To conform to federal communication requirements, SNAP agencies should inform clients about the text messaging program and give them the option to opt in via application and recertification forms and during other touchpoints where consent can be documented. Calls and interviews with field staff also provide good opportunities to let clients know about the program and either get their consent or direct them to a sign-up form to opt in.

When obtaining consent, you should:

- Explain who will send messages
- State the purpose of messages
- Inform clients of message frequency
- Disclose that message and data rates may apply
- Explain how clients can opt out in the future

Once clients have agreed to participate, a good practice is to send them an introductory text reminding them of the program's purpose with the opportunity to further confirm opting in.

### Sample introductory message with opportunity to confirm their opt in

[Agency] is using a text message reminder service to help you keep your benefits. Would you like to receive reminders about the SNAP renewal process?

You will still get mail notices and will receive up to 4 texts per month. Standard messaging and data rates may apply.

Please reply YES or NO. You can opt out at any time.

### Sample introductory message with additional opportunity to opt out

[Agency] is working to ensure you keep your SNAP benefits. We will send you important reminders and confirmations to help you complete each step of the renewal process.

Don't want reminders? Reply STOP to end texts.

## Choosing the Right Type of Number for the Job

There are three types of numbers that can be used for high volume texting: short codes, toll-free numbers, and local numbers (also called 10-digit long codes).

Below is a breakdown of the different number types. The exact costs, specifications, and other considerations for each type of number will depend on the approved use case (i.e., for what purpose texts will be sent), texting platform vendor, and telecommunication carrier that messages are delivered through (e.g., some carriers will impose stricter limits on volume than others). Therefore, this table is for illustration purposes only. However, per message cost is currently less than \$0.01 for all three types of numbers.

Regardless of which type of number you use, remember to work with your texting platform vendor to ensure the number is registered appropriately (e.g., recognized as belonging to a government entity) to avoid imposition of requirements that are otherwise not applicable.

	Short Code	Toll-Free Number	Local Number or (10-Digit Long Code)
<b>Description</b>	5- or 6-digit number	10-digit number with a 8## prefix	10-digit number with standard area code prefix
<b>Provisioning Time</b>	Weeks-Months	Minutes (but verification through texting platform can take longer)	Minutes (but trust/RISQ score can take longer)
<b>Setup Cost</b> Some platforms do not charge for setup	~\$500-\$1,000	~\$5	~\$5
<b>Maintenance Cost</b>	~\$6,000-\$12,000 annually	~\$5-\$15 annually (but may be more based on vendor and message volume)	~\$2-\$200 annually
<b>Deliverability</b> Likelihood message reaches recipient	High	Moderate (but high if verified through texting platform)	Moderate (depending on trust/RISQ score and carrier)

	Short Code	Toll-Free Number	Local Number or (10-Digit Long Code)
<b>Throughput</b> Low: less than 10 messages per second Medium: Between 10 and 60 messages per second High: More than 60 messages per second	High	Low (but high if verified through texting platform)	Low to high (depending on trust/RISQ score and carrier)
<b>Total Volume</b>	Unlimited	Unlimited (if verified through texting platform)	Low to high (depending on trust/RISQ score and carrier)
<b>Can Send Messages Through Existing Voice Line Numbers</b> Such as the agency's customer service hotline	No	Yes	Yes

## Best Practices for Texting

Regardless of your texting approach, here is a checklist of best practices to keep in mind:

- Obtain consent before you text clients and give them the ability to opt out of future messages.
- Send all messages from the same short code or phone number, and make sure that all field staff and community organizations that assist SNAP clients are aware of the text messaging program and have the number, in case clients call with legitimacy concerns. See above for more on using a short code versus a phone number.
- Establish legitimacy by identifying the agency's name and why you're texting in the initial message. If you're working with a vendor to send messages, the vendor should explain how they are partnering with the agency to avoid potential client confusion from hearing from multiple sources. You could consider providing a hyperlink to a statement from the agency that explains the text messaging program and any vendors involved.
- Keep hyperlinks short so clients without smartphones can easily type them into a browser. Avoid using public link shorteners like bit.ly and rb.gy, as some carriers block messages containing them as potential spam.

- For automated text messaging, set up auto-replies to clients who text back, letting them know that replies are not read and referring them to the call center. Set up an automated voice message referring clients who dial the number to the call center.
- Keep text messages short and to the point, ideally less than 160 characters to ensure they send as one SMS for people without smartphones. Larger messages are split into segments of 153 characters and may be received out of order, so you should not exceed 306 total characters (2 SMS segments). The best way to do this is using an SMS length calculator like TextMagic. This is particularly important for texts in other languages.
- Use plain language and give clients clear actions with simple decisions. For guidance on plain language see [plainlanguage.gov/guidance/audience](https://www.plainlanguage.gov/guidance/audience). For more on choice architecture, check out this [paper on Choice Architecture](#) by Richard Thaler, Cass Sunstein, and John Balz.
- Test message framing, timing, and frequency with a small number of clients to maximize impact and iron out potential issues before you launch the program. See Code for America's [LA'Message Pilot report](#) for how iterating messages with clients can improve results.
- Provide clients with the call center phone number if they have questions or need assistance.
- Offer translation options for commonly spoken languages and continue messaging clients in their preferred language once established. Better yet, text clients in their preferred language from the outset. See [lep.gov/translation](https://lep.gov/translation) for advice.
- Make sure text message content and timing align with other notifications and communications clients are receiving about their benefits. Messages requiring action by a deadline, like completing a renewal, should be sent with enough lead time for clients to complete the task.
- Review federal, state, and local security and privacy regulations about what information can be sent/received via text. To protect client privacy, agencies should omit unnecessary sensitive or personally identifiable information.
- If possible, connect your texting platform to the case management system or create a way to sync them at frequent intervals so that field staff can see what texts clients have received/responded to and verify the texting platform is sending clients relevant texts.

# Texting Strategy + Content Roadmap

Below is a snapshot of what's involved in the texting strategy and content workflow over the project lifecycle. In orange are key scope and design activities for defining your texting approach and texting engagement plan.

