Meeting clients' needs through text messaging

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SUMMARY

Becca Frank, a Foster America fellow with Denver Human Services (DHS), helped to develop and implement a text messaging program to make it easier for individuals and families to keep track of the myriad of appointments, deadlines, and paperwork required to get and keep important benefits and services to support themselves and their families. For children and families involved with, or at risk of involvement with, the child welfare system, this is especially important in ensuring that children and families receive the concrete economic support they may need to thrive.

THE OPPORTUNITY

DHS observed that clients were coming into their offices or calling often with similar questions, such as the time and date of their next appointment and confirmation of paperwork they had submitted. Further, the complex requirements of benefits programs, including appointments and paperwork deadlines, resulted in clients often losing access to benefits to which they are entitled. DHS wanted to explore how to use technology to make it easier for individuals and families to interact with DHS, keep track of program requirements, and ultimately obtain services to support themselves and their families.

THE SOLUTION

Explore what information already exists. DHS began their technology exploration by taking stock of what already exists: identifying the data and information they already have about the experiences of clients navigating DHS (e.g. survey and administrative data), and learning from examples of other public agencies around the country using technology to engage clients. The data helped the team form their interview guides and key research questions going into Step 2.

Engage staff and clients. Becca and her team interviewed and shadowed staff and clients to gain a deeper understanding of client needs and pain points in accessing benefits, as well as to understand clients' access to and comfort with technology. To capture a broad range of perspectives, they focused on finding interview participants through different entry points, including those coming into the DHS building, reaching out by phone, and through outreach workers at homeless shelters.

Evaluate solutions. DHS evaluated a range of possible solutions, including web-based portals, mobile applications, and automated notifications. DHS learned from client interviews and surveys that although some clients may have limited access to reliable internet, many clients have unlimited text messaging through cell phones provided by the federally-subsidized Lifeline program. They also found that texting was more accessible across client age than other technology solutions, and would be cheap and fast to implement. Therefore, DHS decided to develop a text message-based solution to engaging DHS clients. Within text messaging solutions, DHS identified three main categories: one-way automated messages, two-way automated systems, and solutions that allow staff to send custom text messages to clients. The team decided that one-way messages, with notifications like appointment reminders, deadline reminders, and confirmation of paperwork received, would be the "minimum viable product" that they could release

most quickly, require little additional staff time to manage, and would address clients' common questions. In future versions, the DHS team might build some two-way automated interactions, such as rescheduling appointments.

Develop and test a prototype. DHS' technology team developed a prototype of the one-way messaging program and used that to conduct a set of interviews with a small set of staff and clients. The technology team conducted several rounds of prototype improvements and tests with a small set of staff and clients before moving the text messaging program to the pilot phase.

Pilot the program. DHS piloted the text messaging program with one of its workforce development programs, selected for the program's small participant size and high frequency of required appointments. DHS' legal and privacy teams designed an opt-in process for clients who want to participate in the text messaging program. DHS then obtained permission from the workforce development program participants to send text messages and gathered feedback from participants about the text messages to improve the notifications.

Iterate and scale. Implementing the texting program required a shift in DHS' database setup. As the text messaging program made it possible for clients to receive notifications about all of their DHS interactions, which may include, but are not limited to, food and cash assistance, child support services, and child protective services, all from one place, DHS had to shift its database from a program-centric system (e.g. benefits assistance managed its data separately from child protective services) to a client-centric system.

DHS planned a phased approach to scaling up its texting program, offering the texting service to participants in one program at a time, to ensure that they could capture learning from clients and staff in each program with each iteration.

THE RESULT

As of June 2020, DHS has emailed or texted the consent form to over 6900 clients. Over 2700, or about 40 percent of those who have received the link, signed up for the notifications program. While DHS doesn't yet have data linking this tool to a change in the number of clients getting and keeping benefits, the anecdotal qualitative feedback from clients has been very positive.

RESOURCES

- [Denver Human Services announces client messaging program](#)
- [Denver Human Services Round 1 Interview Guide](#)
- [Denver Human Services Round 2 Interview Guide](#)
- [Denver Human Services Interview Consent Form](#)
- For more technology design and testing tools, see:
  - [NYC Civic Service Design Tools + Tactics](#)
  - [Federal paraphrase testing guidelines](#)