



**U.S Department of Veteran Affairs
Veterans Experience Office
810 Vermont Avenue, NW
Washington, DC 20420**

November 5, 2020

FOIA Request No.: 21-00663-F

Mr. Austin Evers
1030 15th Street, NW
Suite B225
Washington, DC 2005

Reference: FOIA 20-08472-F

Dear Mr. Evers,

This letter is the initial agency decision to your July 28, 2020 request under the Freedom of Information Act (FOIA), 5 U.S.C. § 552, submitted to the Department of Veterans Affairs for a copy of the following documents [or documents containing the following information] be provided:

1. Your request was received by the VA FOIA Service on July 29, 2020 and assigned FOIA tracking number **20-08472-F**.
 - You requested a copy of "All calendars and calendar entries for the agency official listed below, including any calendars maintained on their behalf, reflecting events that took place from January 1, 2020 to the date the search is conducted." The specific calendars that you are seeking pertain to the following:
 - a. Secretary Robert Wilkie;
 - b. Acting Deputy Secretary Pamela J. Powers; and,
 - c. Acting Chief of Staff Brooks D. Tucker.
 - Bates numbered pages (20-08472-F) 009174-009200 are being referred, under FOIA tracking number **20-00663-F**, to the VA Veterans Experience Office at:

Department of Veterans Affairs
810 Vermont Avenue, NW
(30) VACO
Washington, DC 20420
Phone: (312) 720-9218
VEOFOIAOfficer@va.gov

On October 29, 2020, your request and responsive records were forward to the Veterans Experience Office (VEO) for further attention. Specifically, found on the calendar for Acting Deputy Secretary Pamela Powers' on August 7, 2020 - Meeting the VA Priority of Customer Service. These documents were referred to this office for a releaseability determination and direct response to you.

It is our policy to process requests for access to Veterans Experience Office/White House Hotline records on a first-in/first-out basis (FIFO). This office assigns incoming requests to one of three tracks: simple, complex, or expedited. Each request is then handled on a first-in, first-out basis in relation to other requests in the same track. Simple requests usually receive a response in about a month, whereas complex requests necessarily take longer. At this time, your request has been assigned to the simple track.

The Freedom of Information Act, 5 U.S.C. § 552(A)(a)(ii), places all FOIA requesters in one of three categories for fee purposes. The three categories of FOIA requesters are commercial use; educational institutions, noncommercial scientific institutions, and representatives of the news media; and all other requesters. VEO has determined that you are an "All Other" requester for fee purposes. As such, you are entitled to two free hours of search time and duplication of the first 100 pages of responsive records free of charge. OGC will not be assessing fees for processing your request because our search time equaled two hours or less.

Enclosed are 27 pages of record material which can be released to you. The requested material is enclosed.

I consider this to be a full grant of your request, however; if you are unsatisfied with this response, please know that as part of the 2007 FOIA amendments, the Office of Government Information Services (OGIS) was created to offer mediation services. Similarly, as part of the FOIA Improvement Act of 2016, VA established a FOIA Public Liaison to offer mediation services. Both OGIS and the VA Public Liaison will assist in resolving disputes between FOIA requesters and VA as a non-exclusive alternative to litigation. Using OGIS or the VA FOIA Public Liaison does not affect your right to pursue litigation. You may contact OGIS or the VA Public Liaison in any of the following ways:

Office of Government Information Services
National Archives and Records Administration
Room 2510
8601 Adelphi Road
College Park, MD 20740-6001

E-mail: ogis@nara.gov
Telephone: 202-741-5770
Facsimile: 202-741-5769
Toll-free: 1-877-684-6448

VA FOIA Public Liaison
John Buck
Director, VA FOIA Service
810 Vermont Avenue, NW (005R1C)
Washington, DC 20420

E-mail: vacofoiaservice@va.gov
Telephone: 1-877-750-3642
Facsimile: 202-632-7581

You may appeal by writing to the Chief Counsel, Information Law Group (024), Department of Veterans Affairs, 810 Vermont Avenue, NW, Washington, DC 20420. Your appeal must be received within 90 calendar days of the date of this letter. 5 U.S.C.A. § (a) 6 (A) (i) (III) (aa). Please state clearly why you disagree with the determination of this office.

If you need any further assistance, please do not hesitate to contact me at veofoiaofficers@va.gov

Sincerely,

//SIGNED//

Richard Ivy
Government Information Specialist
Freedom of Information Act Officer

Enclosed

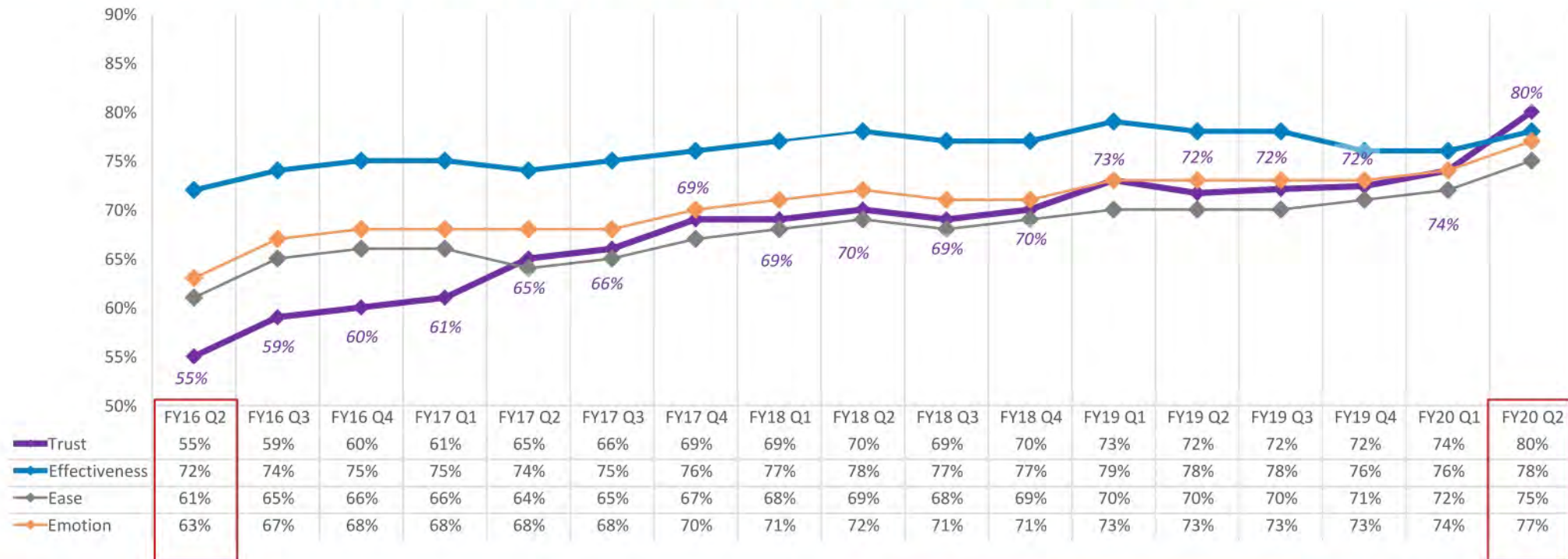
VA Customer Experience (CX) Veterans Experience Office (VEO)

August 7, 2020 Meeting the VA Priority of Customer Service

“Improve the culture – offer world class customer service.” Robert Wilkie, Secretary, Department of Veterans Affairs

CX Impact: VA-Wide Trust Survey Results

Since the commitment to CX, the establishments of VEO and the inception of the VA-Wide Trust Survey, Veteran Trust, Ease, Effectiveness, and Emotion have all risen.



Trust

25% ↑

"I trust VA to fulfill our country's commitment to Veterans."

Ease

14% ↑

"It was easy to get the care or service I needed."

Effectiveness

6% ↑

"I got the care or service I needed."

Emotion

14% ↑

"I felt like a valued customer."

CX Accomplishments at VA – Data & Tools

Data



- Developed the Veterans Signals (VSignals) Survey Program, VA's enterprise customer feedback data program to capture the "voice of the Veteran." VSignals surveys provide vital Veteran insights and drive real-time service recovery efforts, program improvements and accountability. From June 1, 2017 – July 28, 2020: Total Surveys Sent: 30,159,261 Total Survey Responses: 5,371,368 (17.8% Response Rate) Free Text Response: 2,060,010 Active Surveys: 42 across VA Enterprise <https://www.blogs.va.gov/VAntage/71302/veterans-experience-office-uses-customer-feedback-build-trust-va/> Created 37+ journey maps with Administrations and staff offices by interviewing 5,000+ Veterans and staff to identify the moments that matter to both Veterans and employees in their experiences with VA. These journey maps guide program improvements and service recovery efforts including: Outpatient, Inpatient, Emergency Medicine, Telehealth and Community Care. <https://www.blogs.va.gov/VAntage/72161/journey-maps-plotting-moments-matter-veterans-families/>

Tools



- Initiated the Red Coat Ambassador Program in over 158 medical facilities to provide friendly and easy navigation. The program is a vital first impression to VA care promoting a culture of care, while providing assistance and information to Veterans, their families, and visitors. <https://www.blogs.va.gov/VAntage/55562/veteran-experience-red-coat-ambassadors/> Implemented and trained employees in Own The Moment (OTM), a national CX training program, and WECARE Leadership Rounding, a national approach to improve leadership. 95K+ employees trained in OTM 80% of VHA facilities improved in patient experience (PX) satisfaction over the past 3 years based on effective OTM training, Facility PX Champions and effective VSignals survey data. Created a usable directory – designing the VA Welcome Kit with clear and accurate resources based on the moments that matter most to Veterans. <https://www.va.gov/welcome-kit/> 600K+ VA Welcome Kits downloaded and 100K+ distributed in print Distributed to 250+ internal and external organizations, including: Members of Congress, all State Commissioners/Directors of Veterans Services, Veterans Service Organizations (VSOs). Supported the redesign of VA.gov, empowering Veterans with personalized information to apply for benefits and services, view lab results, refill prescriptions, and more. During the last 12 months, 6.2M+ users logged into VA.gov and completed 27M+ successful transactions. Satisfaction scores increased from 55 to 67 on a 0-100 scale within the months following the redesign and averaged 62% satisfaction over the last 12 months. <https://governmentciomedia.com/va-website-redesign-essential-improved-customer-experience>

CX Accomplishments at VA – Technology & Engagement

Technology



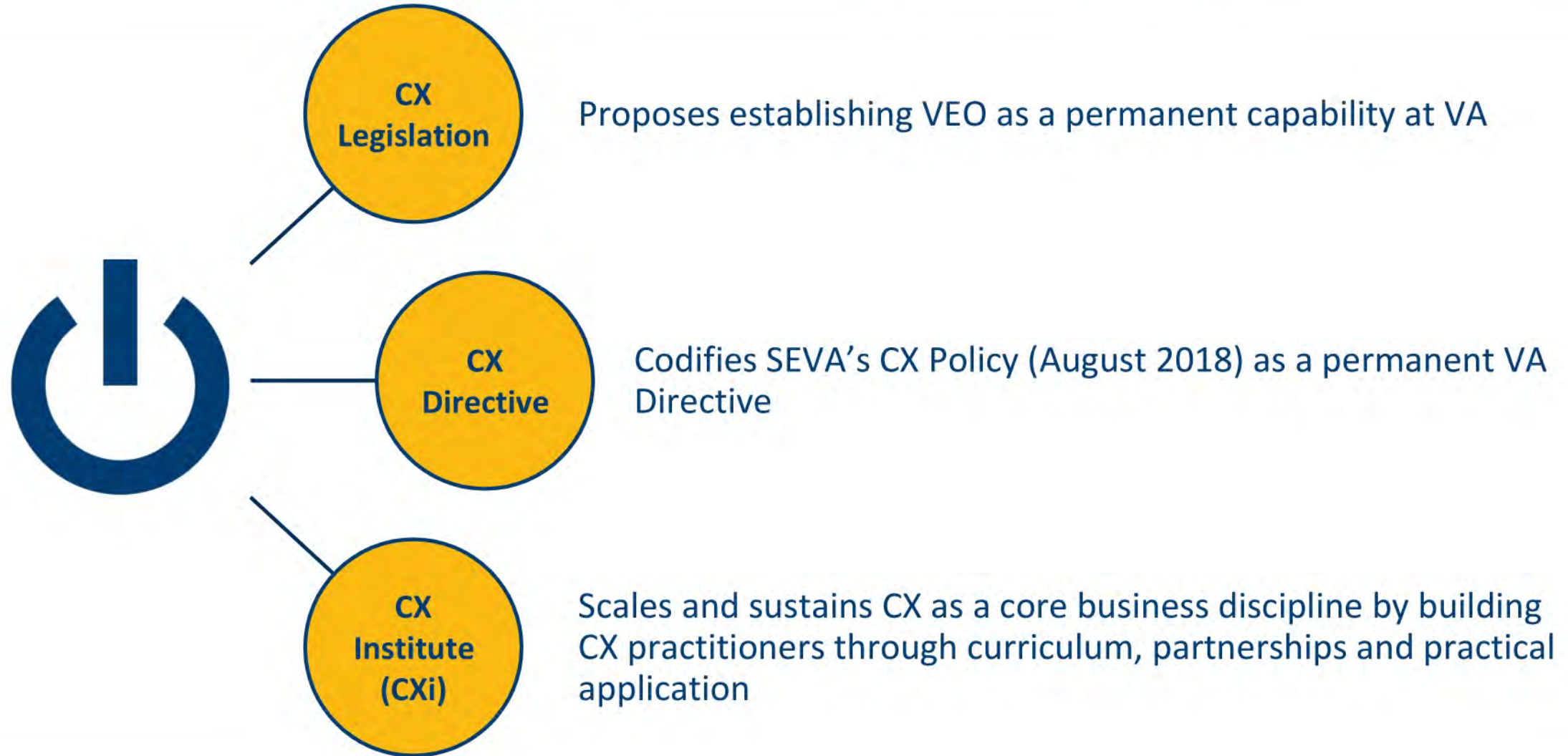
- Streamlined VA databases to build VA Profile, now the authoritative source for Veterans' customer data profiles which currently stores contact information for 17.5M Veterans. 650K+ Veterans have updated their contact info on VA.gov. <https://www.va.gov/change-address/> Operates an integrated White House VA Hotline and VA311 – and is implementing VA's Contact Center Modernization. The White House VA Hotline received 455K+ contacts and resolved over 96% of the cases. VA311 received 1.9M+ calls and transferred 8K+ calls to the Veteran Crisis Line and more than 23K to the National Call Center for Homeless Veterans. <https://www.va.gov/ve/whvahotline.asp>

Engagement



- Executed Veterans Experience Action Centers (VEACs). VEACs, both in-person and virtual, are organized in partnership with local community organizations that serve Veterans to provide an engagement opportunities for Veterans, their families, caregivers and survivors to bring VA services to the Veteran. 9 in-person VEACs conducted in 2019/20 reaching 4,776 Veterans, families, caregivers, and survivors Executed first virtual VEAC (V-VEAC) for Veterans in Florida, July 29-31, 2020 Organized and supported 163+ Community Veteran Engagement Boards (CVEBs) across the country to assist Veterans in local communities with VA services and leverage local resources to enhance their quality of life. <https://www.blogs.va.gov/VAntage/70750/los-angeles-regional-community-veteran-engagment-board/> Created additional outreach and customer communication products: Sent 40M VEText messages to VA customers with updates on COVID-19 services and resources, allowing Veterans access to VA services in a safe manner. Created and developed the electronic #VetResources Newsletter, reaching 11.2M each week. Since creating, #VetResources was sent to 650M+, resulting in 200M+ opens and driving 30M clicks to VA and non-VA resources. Sign up for VetResources at www.VA.gov/VetResources Completed two of the largest virtual SECVA community townhall events in the history of VA- States of VA with Secretary Robert Wilkie. September 28, 2018 – 26K viewers; 22K downloaded VA Welcome Kits; 500 clicks to the Veterans Crisis Line January 17, 2019 – 60K viewers; 1.4M comments, 95K downloaded VA Welcome Kits Launched Veteran Experience Live (VetXL) – Live Q&A chats on RallyPoint with 1.9M viewers and 4K+ questions and answers from Veterans, their families, caregivers and survivors. Created and organized community and strategic partnerships with non-profit/private organizations for in-kind support to improve Veteran, their families, caregiver and survivor experiences: Facebook donated 7,488 Portals to reduce isolation and improve mental health; LinkedIn donated 7,500 Premium subscriptions for networking, training, and employment; Amazon Prime donated 1,144 disposable phones for homeless Veterans to increase access to care with VA and the community; and Operation Gratitude donated 9,800 packages to thank VAMC employees on the front lines.

Hardwiring CX in VA: Next 120 Days



Deliverables

CX Legislation

FY2022 legislative proposal would establish CX as a permanent capability in VA through a Veterans Experience Office, codifying VA's commitment to CX as a core business discipline. **ACTION: LRP rejected proposal** FY 2022

CX Policy Directive

Would establish policy, requirements and accountability for VA CX in accordance with 38 C.F.R. Part 0, §§ 0.600, 0.603, which defines Core Values, Characteristics and Customer Experience Principles of the Department of Veteran Affairs (VA). It delineates the essential components of an effective customer experience practice to be implemented nationally across VA. **ACTION: Requires SECVA Signature** TBD

CXi

PartnershipsGov CIO Event. Scaling and sustaining CX through HCD workshop. VEO developed and executed virtual 2-day event in partnership with OCIO; nearly 300 attendees participated CX/CAP Governance. The goal is to institutionalize a permanent CX governance structure across agencies so CX community is not contingent on President's Management Agenda (PMA) Cross-Agency Priority (CAP) Goal designation. The PMA CAP Goal team is currently in development of a cross-agency CX governance model. Partnership for Public Service (PPS) Collaboration. Working with PPS to possibly leverage existing PPS Roundtables to test curriculum currently being developed for CXi and PXU and to scale CX principles and tools for government CX practitioners. LVA Collaboration: Collaborating with LVA, the LAB @ OPM, and VHA Innovators Network to provide enhanced HCD training and mentorship to future LVA cohorts. Curriculum & Application Patient Experience University (PXU) Curriculum Pilot. Pilot is being adapted from in-person to virtual (including Own the Moment training). Human-Centered Design (HCD) Curriculum Pilot. Virtual HCD pilot with OIT's AMO staff, using internally developed HCD 101 curriculum. Publish CX Cookbook. A how-to guide on operationalizing CX through Key Ingredients, Adaptations and Sequencing for Success (VA's story). Developing content describing how VA operationalized CX; practical "how-to" guide to allow other components of VA and sister agencies to implement CX CX Webinar Series. Mini-series showcasing CX framework VA uses to implement, scale and sustain CX through 4 core capabilities (CX data, tools, technology, engagement). Webinar series will introduce CX and discuss the 4 prong VA framework; initial target audience is VA employees as the proof of concept; series will set the stage for follow-on series for a broader government agency-wide audience.

June
2020 Ongoing FY
2021 FY
2021 August
2020 August
2020 September
2020 FY 2021 Q1

VA CUSTOMER EXPERIENCE

1. REASON FOR ISSUE: This directive establishes policy, requirements and accountability for VA Customer Experience (CX) in accordance with 38 C.F.R. Part 0, §§ 0.600, 0.603, which defines Core Values, Characteristics and Customer Experience Principles of the Department of Veteran Affairs (VA). It delineates the essential components of an effective customer experience practice to be implemented nationally across VA.

2. SUMMARY OF CONTENT: This directive establishes CX policy, requirements and accountability to ensure all Veterans, Service members, their families, caregivers and survivors receive consistent world-class experiences across VA.

3. RELATED ISSUES: 38 C.F.R. §§ 0.600, 0.603; VA Customer Service Experience Policy (August 22, 2018); Foundations for Evidence-Based Policymaking Act of 2018 (P.L. 115-435); *see also* 21st Century Integrated Digital Experience Act (P.L. 115-336) (outlines CX requirements for technology programs).

4. RESPONSIBLE OFFICE: The Veterans Experience Office (30). Questions may be referred to the Veterans Experience Office (VEO) at Vets-Experience@va.gov.

5. RESCISSIONS: None.

6. EFFECT: This VA directive will remain in effect unless explicitly rescinded.

**BY DIRECTION OF THE SECRETARY OF
VETERANS AFFAIRS:**

Pamela Powers
Acting Deputy Secretary

CONTENTS

1. PURPOSE	1
2. BACKGROUND	1
3. DEFINITIONS	1
4. POLICY	3
5. RESPONSIBILITIES	7
6. RECORDS MANAGEMENT	8
7. REFERENCES	8
APPENDIX A CUSTOMER EXPERIENCE FRAMEWORK	A1
APPENDIX B VETERANS JOURNEY MAP	B1

VETERAN EXPERIENCE

1. PURPOSE

a. VA is committed to providing the best customer experiences in its delivery of care, benefits and memorial services to Veterans, Service members, their families, caregivers and survivors. In doing so, VA has established customer experience (CX) as a core capability in the Department, with the Veterans Experience Office (VEO) as VA's authoritative, lead organization in CX.

b. This directive establishes policy, requirements and responsibilities for VA CX to ensure all Veterans, Service members, their families, caregivers and survivors receive consistent world-class experiences across VA. See 38 U.S.C. § 7301(b), 38 C.F.R. §§ 0.600, 0.603.

2. BACKGROUND

a. 38 C.F.R. § 0.600 describes VA's Core Values, Characteristics, and Customer Experience Principles and serves as internal guidance for employees of VA. These principles define the responsibilities of VA employees, articulate what VA stands for and underscore its moral obligation to Veterans, Service members, their families, caregivers and survivors. They are intended to establish one overarching set of guidelines that apply to all VA Administrations and Staff Offices, confirming the values already instilled in many VA employees and enforcing their commitment to provide the best experiences possible to Veterans, their families, caregivers and survivors. 38 C.F.R. § 0.600.

b. In May 2019, VA amended 38 C.F.R. Part 0 to include § 0.603 VA Customer Experience Principles, therefore codifying CX as part of VA's Core Values and as the responsibility of every VA employee. VA measures CX through *Ease*, *Effectiveness*, and *Emotion*, all of which impact the overall trust the customer has in the organization. The regulation provides operating principles that guide the delivery of services and benefits to Veterans, Service members, their families, caregivers and survivors, and commits that the Veteran Experience should be smooth and easy where Veterans feel honored and valued in their interactions with VA.

3. DEFINITIONS

a. **Best Practice.** Best practice is a procedure or process that has been shown by research, experience and/or evidence-based practice to produce optimal results and that is established or proposed as a standard suitable for widespread adoption.

b. **Customer Experience (CX).** Customer experience is the provision of access and delivering VA care, benefits, and memorial services in a way that is smooth and easy for Veterans, and meets their satisfaction encompassed in the measures of *Ease*, *Effectiveness*, and *Emotion*.

(1) **Trust.** Is the publicly reported VA-wide CX metric made up of the following components: *Ease*, *Effectiveness*, and *Emotion*. It is measured by VEO

through the use of surveys sent to Veterans with the statement, "I trust VA to fulfill our country's commitment to Veterans."

(2) **Ease**. Ease is a measure indicating VA will make access to care and other services smooth and easy. VA employees excel in the dimension of ease when they ensure that services feel predictable, set expectations with Veterans, and make sure they understand where they are in the process and what is coming next. Ease is measured by VEO through the use of surveys sent to Veterans with the statement, "It was easy to get the care or service I needed."

(3) **Effectiveness**. Effectiveness is a measure indicating VA will deliver care and services to the customer's satisfaction. VA employees excel in the dimension of effectiveness when they ensure the delivery of a consistent, high-quality level of service for Veterans, within and across VA facilities. Effectiveness is measured by VEO through the use of surveys sent to Veterans with the statement, "I got the care or service I needed."

(4) **Emotion**. Emotion is a measure indicating VA will deliver care and services in a manner that makes customers feel honored and valued in their interactions with VA. VA employees excel in the dimension of emotion when they strive to engage and connect with Veterans through personal interactions that demonstrate empathy, making them feel like they are valued and heard. Emotion is measured by VEO through the use of surveys sent to Veterans with the statement "I felt like a valued customer."

c. **Journey Maps**. Journey maps are developed through human centered design (HCD) research. They present a common set of Moments that Matter most to Veterans, Service members, their families, caregivers and survivors in their experience and display bright spots and pain points as they seek VA care, services and benefits. Journey maps should be used in conjunction with quantitative data to prioritize Veteran Experience initiatives and efforts. Journey maps should be utilized in the following manner:

(1) Developing a shared understanding of Veterans' experiences across VA.

(2) Identifying VA customer service gaps or bright spots along Veterans' journeys.

(3) Recognizing where multiple VA services might touch Veterans simultaneously along their journeys.

(4) Focusing on Moments that Matter as junctures during which VA should design excellent customer service experiences and outreach opportunities.

(5) Referencing life moments as starting points for generating new products or services.

d. **Moments that Matter**. Moments that Matter are key points that Veterans, Service members, their families, caregivers or survivors identify throughout their journey

during which VA can build trust. These moments have an impact on the customer's overall experience with VA.

e. **Performance Improvement.** Performance improvement is measuring the output of a particular business process or procedure, then modifying the process or procedure to increase the output, increase efficiency, or increase the effectiveness of the process or procedure.

f. **Service Recovery.** Service recovery is a fundamental element of VA's commitment to world-class customer experiences that empowers all staff to quickly acknowledge concerns, clearly communicate a plan for resolution and make things right, thus fulfilling VA's duty to Veterans, Service members, their families, caregivers and survivors. Service recovery is integral to VA culture; is considered everyone's responsibility and reflects an opportunity to turn a potentially negative experience into a positive one.

g. **Veterans Signals (VSignals).** The VSignals platform is used to collect and analyze insights from Veterans, Service members, their families, caregivers and survivors. VSignals helps identify and inform opportunities for immediate and short-term service recovery and long-term program and systems improvement. VSignals measures CX through multiple layers, including: (1) the VA-Wide Trust Survey, which measures trust at the aggregate level; (2) Service-Level Measurement Surveys (e.g., outpatient services, contact centers, appeals), which measure trust at the service level); (3) Community Signals Surveys, which allow customers to submit feedback at any time; and (4) Social Media scraping, which aggregates customer experience data on VA social media accounts.

h. **Multi-Channel Technology.** Multi-Channel Technology represents VA Enterprise-wide initiatives sponsored by VEO to create easy, effective and emotionally resonant experience for customers and employees when they navigate VA. This program includes VA-wide Contact Center Modernization, Digital Modernization, Enterprise Data Management, and other cross-cutting initiatives.

4. POLICY

a. VA is committed to providing world-class customer experience to Veterans, Service members, their families, caregivers and survivors with a Veteran-centered culture. It is VA policy that all employees understand and are accountable for how their roles and responsibilities affect the customer experience and ensure every employee adheres to the Core Values, Characteristics and Customer Experience Principles of VA, to provide the best experience possible to Veterans, Service members, their families, caregivers and survivors.

b. It is VA policy to implement customer experience as a core business discipline across the Department along three key pillars:

- (1) Applying CX Core Capabilities & Framework to service delivery and design;

(2) Instituting CX Governance to hardwire customer insights into VA strategy and decision-making;

(3) Implementing CX Accountability to ensure that metrics are tied to organizational and individual performance, and budget decision-making.

c. VA is institutionalizing this customer experience mission into policy formulation and strategic, operational, and tactical decision-making to deliver exceptional customer experiences for Veterans, Service members, their families, caregivers and survivors, and empower employees with the tools to provide those experiences.

PILLAR I: CX CORE CAPABILITIES & FRAMEWORK

Based on industry and other best practices, VA has established CX Core Capabilities and a CX framework (See Appendix A). This framework is built around two guiding principles: leverage industry and other CX best practices; and listen to, and design service delivery around, the customer.

Foundational enablers to these guiding principles are core CX capabilities that VEO provides to VA, including real-time CX data, tangible CX tools, modern, integrated multi-channel technology and targeted engagement. These capabilities empower employees to work collaboratively to deliver outstanding experiences to Veterans, their Service members, their families, caregivers and survivors through actionable real-time CX data and predictive analytics, concrete CX tools, training and implementable practices, user-friendly technology and personal engagement with VA customers.

This CX framework, which begins with leveraging industry and other best CX practices, is coupled with customer insights through human-centered design (HCD), and is enabled by the core CX capabilities of data, tools, technology, and engagement, is designed to drive improvements in service recovery and system-wide performance. This framework can be applied across VA and other Federal Agencies.

Four CX Core Capabilities:

1. **CX Data.** To maintain a view of VA's performance in customer experience, at least two levels of CX measurement are required: a VA-wide, Enterprise metric to understand CX globally across VA; and transactional metrics to understand CX by individual service line to perform individual service recovery and make actionable improvements system-wide. Both levels of customer experience measurement include Likert scale scoring, and the transactional metric also includes free text boxes for customers to provide open-ended compliments, concerns, or recommendations specific to a service line experience.

i. **VA-wide, Enterprise Metric:** This recurring VSignals survey allows Veterans, the public and VA to understand customers' overall trust in VA, as well as the ease, effectiveness and emotional resonance of Veterans' interactions with any VA business line. It

provides a global benchmark of the VA brand and customers' perspectives on their relationship with VA.

ii. Transactional Metric: This weekly VSignals survey allows VA leaders, managers and other staff to access and understand compliments, concerns and recommendations that Veterans have when using VA services. This program also empowers VA employees with a predictive analytics capability to detect and clearly visualize trending topics before they intensify, and allows them to search data by topic, priority area, location, timeframe, age, gender, word search and other domains. A social media scraping capability is also included.

In addition to providing real-time CX qualitative and quantitative data, the strategic re-design of back-end business processes will also be considered to enhance both employees' and customers' experiences. Efforts in this area ensure the CX data, and new real-time and predictive capabilities this capability provides, are utilized for timely service recovery and system-wide performance improvements.

2. CX Tools. Based on the industry best practice of HCD and hardwiring CX data, VEO designs, builds and deploys tangible CX tools for VA employees to deliver great experiences for Veterans, Service members, their families, caregivers and survivors. These tools include employee training in CX (i.e., Own the Moment), leadership best practices, the VA Welcome Kit, and other concrete products and programs that address specific pain points identified by Veterans through CX data and HCD insights.

3. CX Technology. To enable the delivery of effective Veteran experiences across multiple communication channels that are on par with industry standards, VA will drive integrated, Enterprise-wide technology initiatives through VEO. Such initiatives include integrated strategy and implementation of Contact Center Modernization, Digital Modernization and Enterprise Data Management. Both front-end (i.e., Veteran-facing) and back-end (i.e., employee-facing) systems and interactions will be addressed.

4. CX Engagement. VA's direct engagement with Veterans, Service members, their families, caregivers and survivors delivered through local Community Veteran Engagement Boards (CVEBs), Federal advisory committees, and strategic partnerships provides VA with listening channels and informational distribution channels to foster two-way communication. CVEBs, which have a national footprint, Federal advisory committees, and other strategic partnerships are all critical enablers for listening to Veterans and sharing information about VA programs, and can be leveraged across the Department.

PILLAR II: CX GOVERNANCE

To institutionalize CX at VA and hard-wire Veterans experience data and insights into VA strategy and decision-making, VA will sustain a CX governance structure. This matrixed structure provides a mechanism to ensure that VA is infusing CX data and insights into how VA addresses and resolves cross-cutting, Enterprise issues, including Contact Center Modernization, Digital Modernization and Enterprise Data Management. Customer experience insights and business problems in need of resolution drive priorities, which are worked by matrixed subject-matter experts from across VA. Recommendations are ultimately provided to and decided upon by the Secretary, Deputy Secretary and other senior VA leadership.

PILLAR III: ACCOUNTABILITY

a. **Customer Experience Performance Metrics.** In addition to the organizational CX reporting requirements enumerated in the Office of Management and Budget (OMB) OMB A-11 Circular, VA will continue to incorporate CX performance metrics into individual performance plans, including Senior Executives who oversee and manage direct care, benefits and memorial service delivery to Veterans, Service members, their families, caregivers and survivors. This ensures VA's alignment with the spirit and intent of the OMB A-11 and provides another mechanism at an individual level for VA to hold itself accountable to Veterans, their families, caregivers, survivors and the public.

b. **Customer Experience Budget Implications.** VA will also incorporate CX performance into budget strategy and prioritization. Specifically, in addition to balanced score card elements of operational, financial and personnel metrics, CX metrics will also be included as well. In doing so, customers will have a front row seat in VA resource decision-making, ensuring resource allocation determinations are informed by what matters most to customers.

VA recognizes that a positive customer experience leads to improved organizational performance, and therefore endorses the importance of hardwiring, scaling and sustaining CX capabilities at VA now and in the future. VA through VEO will establish a CX institute or other similar program in order to provide VA leaders and employees the ability to implement and share CX best practices to scale and sustain CX as a core business discipline at VA now and in the future.

The VA Customer Experience Framework and Veteran Journey Map (see Appendices A and B) also highlight the role of the employee experience in CX. Employees who have a positive experience with the organization will be engaged, and that engagement translates into delivery of excellent experiences to Veterans, their families, caregivers and survivors. Employees will actively participate in promoting VA's Core Values, Characteristics and Customer Experience Principles.

5. RESPONSIBILITIES

a. **Chief Veterans Experience Officer.** VA's Chief Veteran Experience Officer is responsible for ensuring overall adherence to this directive.

b. **Veterans Experience Office.** VEO is responsible for:

(1) Developing VA policy and procedures for CX in conjunction with VA Administrations and Staff Offices and ensuring these policies and procedures are consistent and current with Federal law, regulations and VA strategic goals and plans.

(2) Providing subject matter expert consultation and services on best practices of CX for VA.

(3) Providing evidence based CX data, tangible CX tools and integrated, multi-channel technology, and promoting engagement to support VA in improving customer experience.

(4) Ensuring CX is a driver in VA strategic planning, performance improvement efforts, budget formulation, policy, and other initiatives to improve the experience with VA care, benefits and memorial services.

(5) Scaling and sustaining CX as a permanent, foundational and cross-cutting capability at VA, including through design and deployment of CX education, training programs, innovation and communication by working in collaboration with VA stakeholders and other partners.

(6) Providing necessary guidance and resources to support the execution of this directive across VA Administrations and Staff Offices, including, but not limited to assisting in the development of CX action plans on customer experience programs, initiatives and efforts. Effective action plans will clearly indicate goals, objectives, strategies and measurement necessary to achieve the initiative or effort.

c. **VA Leadership.** All VA leaders are responsible for:

(1) Delivering improved customer experiences by collecting, analyzing and acting on qualitative and quantitative customer experience data, perceptions and concerns.

(2) Using CX data and insights to develop and implement action plans to improve the experience.

(3) Supporting employees by empowering them with the knowledge, skills and tools to provide outstanding experiences to Veterans, their families, caregivers, and survivors.

d. **VA Employees.** All VA employees are responsible for:

(1) Demonstrating commitment to VA Core Values, Characteristics and Customer Experience Principles.

(2) Supporting implementation of CX best practices and utilizing CX data, tools and other capabilities to deliver outstanding customer experiences as defined above.

6. RECORDS MANAGEMENT

All records, regardless of format (e.g., paper, electronic, electronic systems), created in this directive shall be managed per the National Archives and Records Administration approved records schedules found in VA Records Control Schedule 10-1. Questions regarding any aspect of records management should be addressed to the appropriate Records Manager or Records Liaison.

7. REFERENCES

- a. 38 U.S.C. § 1701
- b. 38 C.F.R. §§ 0.600, 0.603
- c. Foundations for Evidence-Based Policymaking Act of 2018 (P.L. 115-435)
- d. 21st Century Integrated Digital Experience Act (P.L. 115-336)

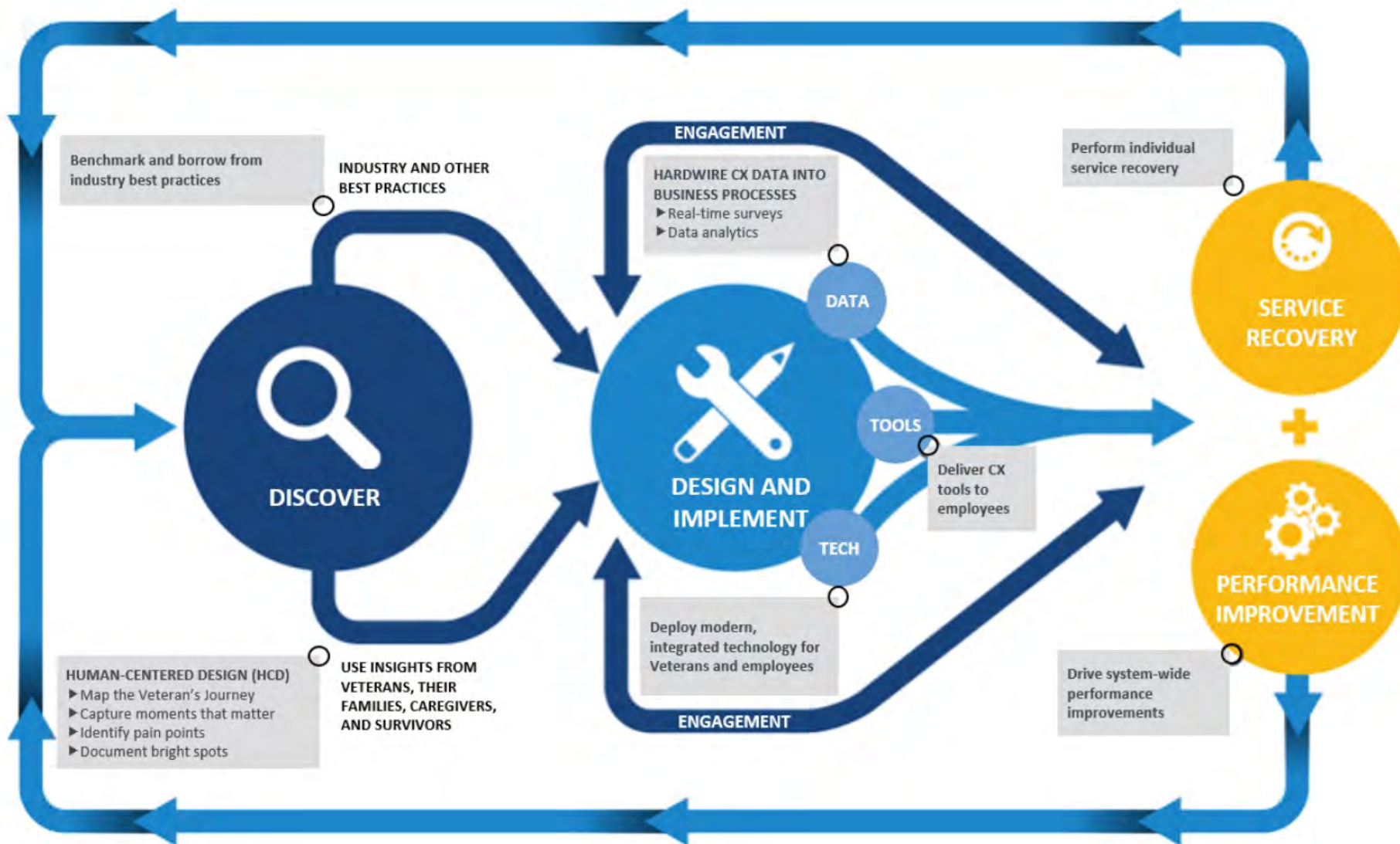
APPENDIX A

CUSTOMER EXPERIENCE FRAMEWORK

Based on industry and other best practices, VA has established CX core capabilities and a CX framework, which is already in practice within VHA. This framework is built around two guiding principles: leverage industry and other CX best practices; and listen to and design service delivery around the customer.

Foundational enablers to these guiding principles are core CX capabilities that VEO provides to VA, including real-time CX data, tangible CX tools, modern technology, and targeted engagement. These capabilities empower employees to work collaboratively to deliver outstanding experiences to Veterans, their families, caregivers, and survivors through actionable real-time ex data and predictive analytics; concrete CX tools; training and implementable practices; user-friendly technology; and personal engagement with VA customers.

This CX framework, which begins with leveraging industry and other best CX practices, coupled with customer insights through HCD, and is enabled by the core CX capabilities of data, tools, technology, and engagement, is designed to drive improvements in service recovery and system-wide performance. This framework can be applied across VA and other Federal agencies.



APPENDIX B

VETERANS JOURNEY MAP

Not all Veterans are the same and there is no “one” veteran. There are, however, a broad set of shared moments many Veterans will encounter and live through. Different Veteran personas will experience and navigate these moments in varied and disparate ways. Using this journey as a guide to organize and align around, VA can plan for and design better experiences for Veterans.

Life events impact individual goals and change priorities. Events like marriage, divorce, widowhood, birth of a child, obtaining a new degree, loss of housing, empty nesting, major illness and so on have profound effects on people’s priorities and how they approach their lives—as well as how they interact and perceive services. These events are unpredictable and may happen at any point across this journey.

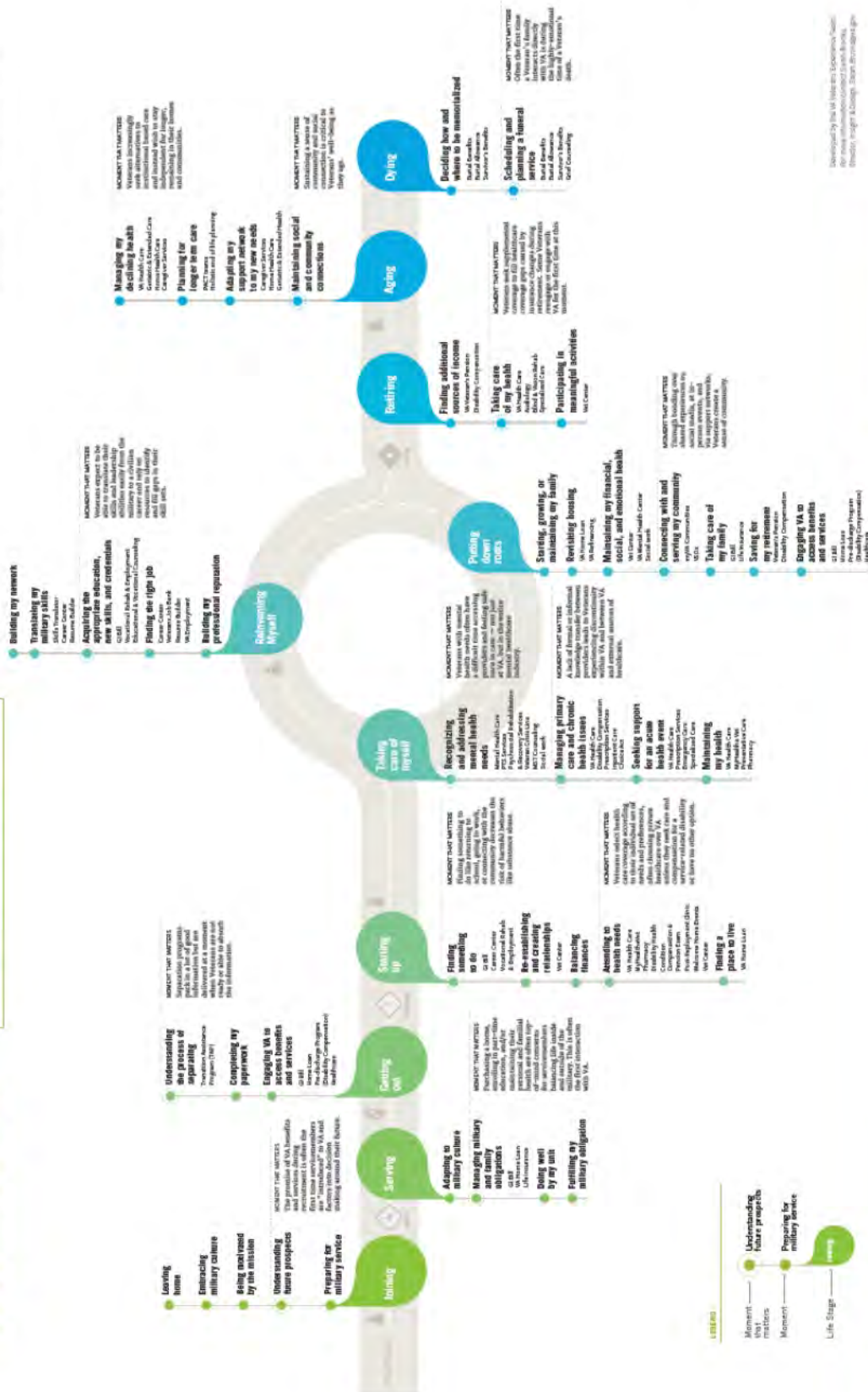
This map covers ten life stages any Veteran may encounter, from pre-service to end of life. These life stages are organized in three phases in which Veterans’ goals and aspirations are distinctly different. Each life stage lists out moments Veterans typically experience and associated VA services, and calls out key “Moments that Matter” which may have significant impact on Veterans’ experiences.

JOURNEYS OF VETERANS MAP

This map covers the life stages that Veterans may experience, from pre-service to end of life. These life stages are organized to show phases in which Veterans' goals and aspirations are distinctly different. Each life stage lists key moments Veterans typically experience and associated VA services, and calls out key "moments that matter" which may have significant impact on Veterans' experiences.

Life events impact individual goals and change priorities. Events like marriage, divorce, widowhood, birth of a child, obtaining a new degree, loss of housing, empty nesting, major illness and so on have profound effects on people's priorities and how they approach their lives—as well as how they interact and perceive services. These events are unpredictable and may happen at any point across this journey.

Not all Veterans are the same and there is no "one" veteran. There are, however, a broad set of shared moments many Veterans will encounter and live through. Different Veteran personas will experience and navigate these moments in varied and disparate ways. Using this journey as a guide to organize and align around, VA can plan for and design better experiences for Veterans.



SERVING IN AND SEPARATING FROM THE MILITARY

LIVING CIVILIAN LIFE

RETURNING AND AGING

Developed by the VA Health Experience Team
VA Office of Medical Services
VA Office of Community Care
VA Office of Health Equity
VA Office of Research and Statistics
VA Office of Information Management
VA Office of Information Technology
VA Office of Information Management
VA Office of Information Technology

117th Congress, 1st Session
Format for FY 2022 Legislative Proposals

Number: VEO-1

Proposal Title: Establishing Customer Experience as a Permanent Capability in VA through a Veterans Experience Office

Agency/Office Priority: 2

Previous History: Resubmission of Proposal Previously Not Forwarded to SECVA for Inclusion in FY 2021 Budget to OMB

Proposed Legislative Authority: Codifies VA's organizational commitment to customer experience as a core business discipline now and in the future, irrespective of administration by establishing the Veterans Experience Office (VEO) within chapter 3 of title 38 of the United States Code (U.S.C.).

Justification: This proposed legislation establishes, by statute, VEO within Department of Veterans Affairs (VA). This will drive an institutional commitment to customer experience (CX) and permanently hardwire CX as a core business discipline at VA now and in the future. Maintaining a sustained organizational commitment to, and institutionalized focus on, the voice of the customer is a critical component of modernizing the Department to meet the needs and expectations of its Veterans, their families, caregivers and survivors. VA must provide consistent and exceptional experiences to every customer across all services, and customer experience is the responsibility of every VA employee. As the leader in government in driving CX and ensuring agencies are responsive to their customers, codifying this commitment through the establishment of VEO in statute demonstrates that VA is and will permanently be a people-centric organization dedicated to serving Veterans, their families, caregivers and survivors.

Collaboration with Affected Offices: Coordinated with HRA, VHA, VBA, NCA, and the Board, pursuant to LRP guidance.

Affected Strategic Objectives: VA's 2018-2024 Strategic Plan is built around CX. In the strategic objectives below, the performance goals directly fall into VEO's mission and capabilities. As an enterprise office, VEO plays the pivotal role of acting as the voice of the Veteran to ensure VA responds to issues with a whole of VA approach in delivering benefits, care and services to our Veterans, their families, caregivers and survivors.

- Objective 1.1: VA understands Veterans' needs throughout their lives to enhance their choices and improve customer experiences.
- Objective 1.2: VA ensures Veterans are informed of, understand, and can get the benefits, care and services they earned, in a timely manner.

- Objective 2.1: VA has collaborative, high-performing and integrated delivery networks that enhance Veteran wellbeing and independence.
- Objective 3.1: VA is always transparent to enhance Veterans' choices, to maintain trust, and to be openly accountable for its actions.
- Objective 3.2: VA holds personnel and external service providers accountable for delivering excellent customer service and experiences while eliminating fraud, waste and abuse.
- Objective 4.1: VA's infrastructure improvements, improved decision-making protocols, and streamlined services enable VA to adapt to changing business environments and Veteran needs.
- Objective 4.2: VA will modernize its human capital management capabilities to empower and enable a diverse, fully staffed and highly skilled workforce that consistently delivers world-class services to Veterans and their families.
- Objective 4.3: VA IT modernization will deliver effective solutions that enable VA to provide improved customer service and a secure, seamless experience within available resources in a cost-effective manner.

Cost Benefit Analysis: Programming years are based on VEO's current reimbursable authority (RA) and follows OM's guidance of assuming a 2 percent escalation in cost for non-pay items, while all other conditions are flatlined to sustain FY 2022-level services. VEO has used a reimbursable budget model since being formed in 2015. In FY 2022, VEO did request budget authority (14 percent of the reimbursement request) to cover VEO's operations and both the Office of Client Relations and the Veterans Relationship Management Program, which were previously funded under budget authority before their realignment to VEO.

Fiscal Year	Cost (in thousands)*		
	Pay	Non-Pay	Total
2022	\$ 47,895.46	\$ 51,603.98	\$ 99,499.44
2023	\$ 47,895.46	\$ 52,636.06	\$ 100,531.52
2024	\$ 47,895.46	\$ 53,688.78	\$ 101,584.25
2025	\$ 47,895.46	\$ 54,762.56	\$ 102,658.02
2026	\$ 47,895.46	\$ 55,857.81	\$ 103,753.27
5-Year Total	\$ 508,026.51		
2027	\$ 47,895.46	\$ 56,974.96	\$ 104,870.43
2028	\$ 47,895.46	\$ 58,114.46	\$ 106,009.93
2029	\$ 47,895.46	\$ 59,276.75	\$ 107,172.22
2030	\$ 47,895.46	\$ 60,462.29	\$ 108,357.75
2031	\$ 47,895.46	\$ 61,671.53	\$ 109,567.00
10-Year Total	\$1,044,003.82		

**Costs listed are reimbursable budget projections – details under methodology.*

To fulfill its mission, VEO delivers unique capabilities of CX data, tools, technology and engagement that together enable the Department to identify customer needs and pain

points, design service delivery improvements around the customer and deploy tangible and implementable solutions in partnership with Administrations and Staff Offices. In this regard, VEO supports VA's modernization efforts by hardwiring CX into VA strategy and decision-making. Some examples of transformational initiatives led or supported by VEO include real-time CX measurement through the Veterans Signals (VSignals) platform, patient experience program, contact center modernization, digital modernization, service recovery and other programs in close collaboration with the Administrations and Staff Offices.

DATA: VEO's CX data capability brings industry best practices to VA by employing human-centered design techniques and direct interviews with Service members, Veterans, their family, caregivers and survivors to gather and analyze qualitative data to drive improved service delivery based on the voice of the Veteran. This capability enables the Department to validate pain points and areas for improvement with Veterans before applying resources to address these issues. This qualitative data also creates a consistent shared understanding about VA's customers and how they feel about their interactions with VA. VEO thus brings the voice of the Veteran to the forefront.

In addition, this capability provides quantitative data about the Veteran's interactions with VA by capturing and analyzing CX input in real time using an industry best in class framework and a modern, web-based platform used by leading customer service companies in the private sector. This allows the Department to view VA's performance from the Veteran's perspective and holds VA accountable to Veterans. Modeling after industry, VEO gathers multiple tiers of CX input to drive improved service delivery based on customer input:

- VA Enterprise Trends: a snapshot of VA performance overall across all service lines, measuring ease, effectiveness, emotion and trust, and used to monitor VA's progress towards increasing Veterans' trust
- Service-Level Patterns: tracking and analyzing CX by service line in real time to improve VA performance and provide transparency in service areas in need of improvement; consists of an online survey pushed to customers after service delivery

Since VEO's creation in 2015, VEO deployed surveys for 14 lines of business, sent over 23 million surveys, receiving over 4.4 million survey responses and 1.7 million free-text responses from Veterans. Through this data, VEO worked with stakeholders to identify opportunities in service recovery and systems improvement that dramatically shifted Veteran trust in VA. VA-wide trust is currently at 80 percent, increasing by 25 percentage points between FY 2016 and Q2 FY 2020. VEO also deployed algorithms to detect free-text responses from Veterans at risk for suicide and homelessness. As a result, over 1,400 suicide alerts have been routed to the Veterans Crisis Line and over 450 homelessness alerts sent to the National Call Center for Homeless Veterans.

TOOLS: VEO's tools and implementation arm deploys VA-wide CX initiatives to include a VA-wide Patient Experience Program. Learning from industry leaders in healthcare, such as the UCLA Medical Center, Mayo Clinic, Cleveland Clinic and Beryl Institute, VEO continues to enhance and deploy this comprehensive program, which infuses CX best practices into the day-to-day culture and operations at VHA facilities nationwide. This VEO program provides cost savings to the Department, as in-house VEO projects are approximately 10 times less expensive when compared to similar contracted projects.

Foundational patient experience tools consist of CX training for leaders and employees and improvements to navigation services by phone and in person. In addition to modeling after industry best practices, this framework was designed around Patient Experience Journey Maps, a human-centered design assessment that identifies the critical moments of a Veteran's interactions with VA. Through that identification, VEO created tools (Own the Moment Training, the Red Coat Ambassador Program and WECARE Leadership Rounding) to improve the patient experience. Since its establishment in 2017, Own the Moment Training, which encourages the delivery of positive customer experiences by connecting emotionally, has reached more than 95,000 VHA full-time employees. The Red Coat Ambassador Program, launched November 2017, has been adopted by 147 VHA facilities. This program outfits volunteers and employees with red coats or vests to greet and assist Veterans, their family and caregivers with wayfinding and information and provide a common information tool for visitors to different medical facilities.

These tools have been instrumental to the increase of Veteran's trust in VA. VHA outpatient trust has increased by 4 percentage points (85 percent in FY 2017 to 89 percent in FY 2020) and VHA is currently improving in patient experience twice as fast as the private sector according to a patient satisfaction survey required by the Centers for Medicare and Medicaid Services for Inpatient Care.

VEO also applies these tools and develops others using its CX framework in support of VBA, NCA, the Board of Veterans' Appeals and other staff offices. In 2018, VEO published the VA Welcome Kit with accompanying quick start guides on key topics such as: how to apply for VA health care, get started with mental health services, apply for disability rating, apply for education benefits, get started with caregiver benefits, apply for survivor benefits. These guides are navigation aides to assist Veterans, their families, caregivers and survivors in accessing VA benefits and services. In FY 2019, VEO published more than 107,000 copies of the VA Welcome Kit, with an additional 341,000 digital downloads.

TECHNOLOGY: VEO's multi-channel technology capability drives Veteran-centric technology solutions by integrating data systems and delivering user-centric capabilities through multiple channels. VEO sponsors VA-wide, integrated technology solutions for Veterans and their families to make their online and telephonic interactions with VA easier and on par with industry. This capability seeks

to create a unified customer experience and unified view of the customer for VA employees through integrated technology platforms, including VA.gov and across contact centers. These improvements are designed using industry best practices and to be easily understandable and accessible to all Veterans, their family, caregivers and survivors so they may seamlessly navigate VA and non-VA services.

One project of delivering user-centric capabilities was VEO's collaborative work in consolidating VA websites and the relaunch of VA.gov as a customer-focused homepage. The results and impact of VEO are showing. As noted, Veteran trust in VA has increased by 25 percent since 2016. In the last year, Veteran satisfaction with the redesigned VA.gov website has increased by 9 percent using Veteran feedback to improve the site. The redesign also earned VA an "A" grade for writing quality in the 2019 Federal Report Card from the Centers for Plain Language (<https://centerforplainlanguage.org/reports/federal-report-card/2019-report-card/>), one of only two agencies to receive an "A" grade.

Additionally, VA Profile is another VEO project assisting with creating a unified customer experience. VA Profile is a data management initiative that synchronizes Veteran data across VA's systems, thereby creating a comprehensive Veteran customer profile. From their first interaction with VA, Veterans are "known" because of VA Profile. VA Profile has made more than 5.7 million contact information updates. VEO also collaborated with the Office of Information Technology and U.S. Digital Service so Veterans have the option to update their profile on VA.gov, where they can also find VA locations, request records and apply for or manage their benefits. This self-service option already facilitated almost 10,000 updates to Veterans' profiles.

ENGAGEMENT: VEO's community engagement capability connects with neighboring establishments and partners to improve the coordination of organizations, governmental and non-governmental, serving Veterans and their families where they live and work. VEO assists in connecting Veterans with local resources through the development of Community Veteran Engagement Boards (CVEBs), Veteran-Friendly Communities and other strategic relationships. This initiative encourages area partnerships focused on the role communities play in a Veteran's quality of life and provides a formal avenue to highlight practices that best strengthen the Veteran partnership. These recommended practices are shared with other communities seeking to build and improve similar Veteran advocacy networks. These efforts directly impact Veterans by providing connections to resources specific to a local environment. There are currently 160 CVEBs positioned across the United States. VEO is also working with the community, VHA and VBA to coordinate Veterans Experience Action Centers (VEACs). VEACs are large-scale, comprehensive Veteran resource events coordinated in collaboration with local VA facilities and local communities to provide Veterans, their families, caregivers and survivors access to VA services. In FY 2019, seven VEACs were completed, resulting in more than 5,600 attendees, with over 4,000 of those attendees receiving

increased access to VA (healthcare enrollment, benefits claim and appeals decisions, wellness exams, appointment scheduling, mental health counseling, etc.).

COVID-19 RESPONSE: VEO is also able to utilize tools it has cultivated and created to quickly help VA customers and employees. In response to the COVID-19 pandemic, VEO added the COVID-19 information banner to the VA.gov landing page, allowing users to effortlessly access the latest information. VEO also organized its engagement arm to provide COVID-19 related updates via the VetResources Newsletter (10.7M subscribers) and VEText Messages (8M+ subscribers) seamlessly. Through VEO's call center support, VEO, in collaboration with VHA, modified the VA311 interactive voice response to include COVID-19 information and answers to the most frequently asked questions. VEO was also able to assist call centers for 15 overloaded VA Medical Centers by answering non-clinical COVID-19 questions. VEO's efforts alleviated the call volume for those VA Medical Centers so they could address more clinical calls.

Ensuring VEO is a permanent fixture in VA creates a cost-savings in many areas of VA because of VEO's proven capabilities, framework and ability to collaborate across VA to produce efficient enterprise-wide results with a team of subject matter experts.

Methodology: Programming years are based on VEO's current reimbursable authority and follows OM's guidance of assuming a 2 percent escalation in cost for non-pay items, while all other conditions are flatlined to sustain FY 2022-level services. VEO has used a reimbursable budget model since being formed in 2015. In FY 2022, VEO did request budget authority (14 percent of the reimbursement request) to cover VEO's corporate operations and both the Office of Client Relations and the Veterans Relationship Management Program, which were previously funded under budget authority before their realignment to VEO.

Legislative Text: Language below modeled after legislative text that established VHA's Office of Patient Advocacy

Create section 324 of title 38 by:

1. Inserting the following title after section 323 “§ 324. Veterans Experience Office.”
2. Inserting within section 324 subsection (a): “(a) ESTABLISHMENT.—There is established in the Department of Veterans Affairs (‘Department’) within the Office of the Secretary an office to be known as the Veterans Experience Office (in this section referred to as the ‘Office’).”
3. Inserting after subsection (a), subsection (b): “(b) HEAD.—
(1) The Chief Veterans Experience Officer shall be the head of the Office.

(2) The Chief Veterans Experience Officer shall be appointed by the President from among individuals qualified to perform the duties of the position.

(3) The Chief Veterans Experience Officer shall report directly to the Secretary.”

4. Inserting after subsection (b), subsection (c): “(c) FUNCTION.—The function of the Office is to carry out the key customer experience initiatives of the Department, including setting the customer experience strategy, framework, policy and other guidance for the Department, and may carry out such other customer experience responsibilities as the Secretary determines appropriate.”

5. Inserting after subsection (c), subsection (d): “(d) STAFF AND RESOURCES. — The Secretary shall ensure that the Office has such staff, resources, and access to customer experience information as may be necessary to carry out the functions of the Office.”

Contact:

- **Program Subject Matter Expert:**
Justin Madigan / Program Analyst, Veterans Experience Office / Justin.Madigan@va.gov / (202) 280-0329
- **OM Staffer who verified Costs and Methodology:**
Matt Hildebrandt / Director, Analysis & Evaluation Service / Matt.Hildebrandt@va.gov / (202) 461-5819
- **OGC Counsel who provide legal guidance and legislative text:**
Aaron Robison / Attorney, Personnel Law Group / Aaron.Robison@va.gov / (202) 714-8522