

BVS POC REPORT - BENEFITS

1. **Date of Report:** June 22, 2023
2. **BVS POC(s):** Carl Bedell, Jamie Inman, Carlton Kent
3. **Service Area/Program:** Benefits
4. **DVS Director/Program Manager:** Michele Watson Crone
5. **Mission of service area/program (i.e. what does it do?):** Advocate for Virginia veterans and their families by connecting them to the benefits and services they have earned by providing accurate, timely and ethical education and assistance. Primarily develop claims to be submitted to the Department of Veteran Affairs.
6. **Who does the service area/program serve (i.e. who are the customers)?** Virginia Veterans and their family members who are seeking federal, state, and local benefits and services.
7. **What are the service line's primary objectives?**
 - a. For FY24 we are retaining our objective to increase veteran population served with a target increase of 10% over FY23 totals. This targets an additional 1299 veterans over FY23 projected totals.
 - b. For FY24 we are retaining an objective for 100% Transition Assistance Program (TAP) participation on all Military Installations (Veteran Service Representatives and V3 team)- Provide service to transitioning service members by 2025.
 - c. For FY24 we are retaining our objective to increase Compensation and Pension Claims to the VA, with a target increase of 10% over last year's production. This targets an additional 2,223 claims over FY23 projected totals.
8. **What are the key results that support the objective(s)?**
 - a. For FY24, to make contact with 1362 new Veterans per month.
 - b. For FY24, to obtain access to 2 new installation TAP programs this year.
 - c. For FY24, to submit 2,039 C&P claims on a monthly basis (supporting 24,460 per year).
 - d. For FY24, to achieve over 300 hours of outreach per month.
 - e. For FY24, to submit 217 BDD claims per month (2604 per year).
 - f. For FY24, to screen 100% of new clients for suicide prevention.
 - g. For FY24, to establish a virtual customer contact center (to improve efficiency in customer contacts).
 - h. For FY24, to use and modify the VESA interface to enable lower traffic offices to virtually assist higher traffic offices via Teams/Zoom and to digitally refer clients across service lines utilizing the Gold Standard Digital Hub interface.
9. **What specific objectives (end of FY2022, end of FY2025) has the service line established and what progress has the service line/program made toward achieving the objective(s).**
 - a. For FY23 our goal was increasing the veteran population served by 20%. As of June 1, 2023, Benefits served 13,613 new veterans, and we are forecasting a total of 14,851 for the FY, which is an increase of 11% over FY22. We fell short of the objective and the monthly key result for new veteran numbers. The 20% target was set subjectively in FY23 without any baseline data (this was the first time tracking new client data). Given this year's data,

we have refined the objective for FY24 to an additional 10% which we think is achievable yet challenging. Other than the new client numbers themselves, we achieved 100% of our other key results in this area: creating 4 regional Facebook pages with weekly posts; establishing 4 new offsite locations serving veterans; establishing 10 new VSO partnerships; and, codifying the process for tracking of new veteran contacts and outreach hours within our claims software. Additionally, we had a target of 2000 Before Date of Discharge claims in order to gain new customers by targeting separating/transitioning service members. For FY23, as of June 1, 2023 we filed 2,201 BDD claims, and are forecasting 2400 for the FY, exceeding the 2000 target number. For FY24, we have extended that goal to increase by 10%. For suicide prevention, we screened 94.4% of all veteran clients in FY23 as of June 1, 2023.

- b. For FY23, we had an objective to work towards 100% TAP program participation by 2025. At the beginning of FY23, we were regularly briefing at 3 of 9 locations offering TAP classes (Quantico, Dahlgren, Ft Greg Adams). We gained irregular access to one additional location (Ft Eustis) and are in the process of adding a second (Norfolk). We were unsuccessful in engaging DoD leadership for TAP access and have found that access to the TAP programs are relationally based/personality driven, depending on the program manager and base Commander. We are having some success in gaining access to set up tables around the TAP briefings (catching traffic during lunch/breaks) but are very limited in our ability to get on the formal TAP briefing schedule due congressionally mandated TAP content guidelines. FY24 goals will seek to add 2 new locations where we are able to brief/connect with transitioning service members during TAP.
- c. For FY23, we had an objective to increase claims submitted to the VA by 10% over the prior year. As of June 1, 2023 total claims submitted was 20,384, and we are forecasting to hit 22,237 total for the FY – an increase of 13%, exceeding the goal. For FY24, we have set a new goal to again increase claims by 10%.

10. What are some operational highlights from the past year?

- a. For FY23 as of June 1, 2023 there were 43,103 total submittals to VA.
- b. For FY23 as of June 1, 2023 ‘In-person’ contacts in the 34 offices totaled 41,032, and are forecasted to be 44,762, an increase of 8,323 in person contacts over FY22.
- c. Benefits service line developed a statewide veteran online appointment tool “Veteran Engagement and Scheduling Application (VESA), which allows customers the ability to book an appointment online across any of our 35 locations. The agency moved from concept to testing to full fielding in 35 offices in 4 months - a process that industry takes 6 months to a year to build and implement. Part of this new software was a new "Landing Page" which has become the centerpiece for the Governor's Gold Standard Digital Hub initiative.
- d. Benefits service line weathered the publishing of the Federal PACT Act in August 2023, which opened the door for a large number of additional veteran disability claims. During this time, Benefits experienced our highest turnover and vacancy rate in 7 years, and endured changing out 100% of our software-based tools (new claims management system, new email system, new leave/pay system, new online customer contact system). Despite these obstacles, our benefits staff produced 12% more claims and 22% more in person contacts than FY22.

11. What type of outreach did the service line conduct and what are the results?

- a. Benefits established 4 new regional Facebook pages and maintained posts weekly.
- b. Benefits established new VSO/Veteran support Partnerships with:
 - a. Virginia Tech Student Veteran Caucus (Wytheville Office)

- b. Piedmont Area Veterans Council, Farmville (Lynchburg Office)
 - c. Garner North Carolina Veterans Service Center (Danville Office)
 - d. City of Hopewell (Petersburg Office)
 - e. Henrico Community Based Outpatient Clinic (Henrico Office)
 - f. Arlington American Legion (North Region)
 - g. Virginia Military Institute Chief of Staff (Staunton Office)
 - h. Hampton Roads Council of Veteran Organizations (Williamsburg Office)
 - i. JB Langley-Eustice (Hampton Office)
 - j. Norfolk Naval station Regional TAP Office (Hampton Office)
 - k. Legal Aid Society of Eastern Virginia (Appeals Section – Williamsburg)
- c. Benefits established new offsite work locations at
- a. Patrick County Workforce Center (Danville Office)
 - b. Farmville AL (Lynchburg Office)
 - c. City of Hopewell (Petersburg)
 - d. Arlington American Legion (new office)
 - e. Henrico CBOC (Petersburg Office)
 - f. Fort Eustis (Hampton Office)
 - g. Langley AFB (Hampton Office)
- d. Benefits Director served as the Petersburg Community Resource Center Executive Director, standing up the center as part of a Governor’s initiative. In this capacity she shared responsibility for Benefits leadership while coordinating all aspects of the center’s development, partnerships, logistics, and agreements to ensure success of the center, which provides numerous services to help veterans and citizens in the Petersburg area to Work and Thrive in Virginia.

12. What, if any, new initiatives / innovative solutions were launched during the past year?

- a. Technology: Drawing on the best from industry and other governmental services, the Benefits service line developed a statewide veteran online appointment tool *Veteran Engagement and Scheduling Application (VESA)*, which allows customers the ability to book an appointment online across any of our 35 locations. The agency moved from concept to testing to full fielding in 35 offices in 4 months - a process that industry takes 6 months to a year to build and implement.
- b. Technology: Part of this new software is a new "Landing Page", or central location on our website used to access DVS services. This has become the centerpiece for the growth and implementation of the Governor's Gold Standard Digital Hub initiative.
- c. Technology: Benefits is in the process of upgrading internet services at all field offices to be placed on the COV network with an expected completion date of August 2023. This upgrade both meets security requirements, reducing the risk to cyber threats, but also increases internet speeds at many of our more rural offices providing better access to our increasing use of virtual and technology-based tools.
- d. Transition to Appointment Centric services. With the fielding of the new VESA software this year, we were able to take an innovative look at how we provide services to our veterans. Previously, many offices suffered from long wait times for walk-in services, and lack of appointment availability during certain times of the day. The limited access to services for veterans who were still working or only available during certain times of the day. This also presented us with employee overload and having to turn away many veterans during illnesses or other absences where the waiting room remained full, despite short

staffing. The planning, oversight and management capability of the software along with the ability to shift or cover appointments during absences provided a solution to each of these issues simultaneously.

- e. TAP Integration: Norfolk TAP integration with transitioning service members was successful from a staffing and VA perspective. The Civilian Navy Regional TAP Staff embraced DVS participation as well as the VA Site Leads. The curriculum set forth is tightly controlled and DVS has been unable to be included in the actual brief. We have integrated at lunch time briefs and a table set up in the vendor area on the VA day. We have integrated DVS service lines of VVFS and VETE to make sure we are all encompassing in addressing possible needs of the transitioning service members.

13. What are the biggest challenges facing the service area / program at present?

- a. Codifying the transition to Appointment Centric Services:

Challenge: The transition to Appointment Centric services is challenging from multiple standpoints. Initial results are favorable, but remains a challenge to alter the expectations of our customers who are used to years of walk-ins. Additionally, each encounter and claim with a veteran is unique whereby the same type of claim may take 30 minutes with one customer but an hour and half with another. Such flexibility does not easily fit into a rigid, preplanned appointment schedule. Our challenge is to grow smarter on time management, refine our planning methodology, update the system for flexibility as able, and manage veteran/client expectations.

- b. Change Management—As DVS moves forward with more advanced technology (GSDH), the challenge for leadership is to engage the field in its development, glean their knowledge and experience while providing clear intent and boundaries to achieve the goal. Benefits remains a large service line that is geographically separated and very busy. Proactive, frequent, flattened, 2 way communication is critical to ensuring both the leadership intent is met, and that the process works at the front line for both customer and employee.

14. How does delivering the service/program help Virginia's veterans?

Financially, emotionally and full service access to all DVS service lines.

15. By helping the veteran, how does it help the Commonwealth?

Benefits assists Virginia's veterans and transitioning service members in applying for compensation, pension and other benefits claims with the Federal VA. Approval of a claim results in monetary monthly payments, which translates to more dollars spent in the economy as well as more sales tax revenue for state a local government. The increased financial assistance through the granted claims directly contributes to a veteran's ability to "Thrive" in Virginia. Furthermore, with each new veteran or transitioning service member encounter, we screen for suicide risk and interview for referrals to all DVS service lines ensuring they have access to all the Benefits that Virginia has to offer – further enabling them to "Thrive" while also influencing their decision to "Stay". Finally, Virginia's Transitioning Service Members are also briefed, both formally and informally, during Transition Assistance Program session briefings, Benefits Delivery at Discharge claims briefings and events in and around military installations. In these formats, they learn valuable information about Virginia and the benefits offered. Working with them early and often increases the chance they will "Stay" in Virginia.

16. What strategic opportunities are there for the future?

The service line is seeking to better utilize technology to centralize and streamline customer access points to services, such that person-to-person interactions are conducted as efficiently and productively as possible. We are seeking implementation and integration of a Virtual Customer Service phone system with Virtual assistant and Artificial Intelligence technology to answer basic questions and provide basic information before a person is engaged. We want to utilize online forms and signature capabilities, digital veteran identification, digital referrals between service lines to be more efficient with time spent with our customers, and share workloads across our offices. Each of these improvements are intended to enable us to serve more veterans and provide better service, enabling them to Stay, Work and Thrive in the Commonwealth.

17. What else do you want the Board to know about this service area?

- a. The FY23/24 Budget Increase has been a tremendous help to increase VSRs and supporting staff to reach more veterans and provide much needed training. We have hired 13 new VSR positions across the state, 2 Appeals Attorneys and 3 VSA positions. The positive impact of these hirings can be seen in the increase in number of claims and contacts generated this year (ref question 10 above).
- b. This past FY has been one of the service line's worst in recent history for employee retention. The service line experienced a 14% vacancy rate this year (vs 5% historical) and turned over 1/3 of our total positions. Inflation, higher costs of living, increased pace of work following the PACT Act as well as much higher salaries and remote working opportunities offered by the Federal VA for comparable jobs have all played into this problem. Given that it takes upwards of 6-8 months to train a new Veteran Service Representative, the loss of each employee strains our remaining employees, exacerbating the problem. In response to this the service line implemented a number of new technologies and methodologies (e.g appointment centric services) which should help regulate workloads while offering better customer experience. The agency also utilized a recent salary study and took some budgetary risk using funds from an historical 5% vacancy rate to implement experienced-based raises with increases every 5 years in hopes of affecting retention – though we still fell short of the study's median (middle of the pack) recommended salaries. Additional budget increases have also been requested to assist with continuing this effort and offering future raises to make our positions even more competitive.
- c. The service line is exploring methods to rejuvenate employee environments and workloads to prevent burnout and excessive stress.

