

**AMERICAN FEDERATION OF GOVERNMENT EMPLOYEES, AFL-CIO**

**BEFORE**

**THE U.S. HOUSE OF REPRESENTATIVES**

**COMMITTEE ON VETERANS' AFFAIRS**

**SUBCOMMITTEE ON DISABILITY ASSISTANCE AND MEMORIAL AFFAIRS**

**MARCH 16, 2006**

The American Federation of Government Employees, AFL-CIO, which represents more than 600,000 federal employees who serve the American people across the nation and around the world, including roughly 150,000 employees in the Department of Veterans Affairs (VA), is honored to submit a statement regarding the training and staffing of employees providing telephone assistance (“Public Contact”) at Veterans Benefits Administration (VBA) Regional Offices (ROs).

AFGE shares the Subcommittee’s goal of providing accurate benefit information to veterans and their family members in a prompt and courteous manner. At both the national and local levels, AFGE is committed to working with the House Veterans’ Affairs Committee to move closer to that goal. We also urge VA management to include AFGE and front line employees in future discussions regarding VBA effectiveness.

In order to provide the Subcommittee with helpful feedback, AFGE consulted Veterans Services Representatives (VSRs) working in ROs covering a range of locations, size and internal structures. Public Contact is currently handled almost exclusively by VSRs.

Several consistent themes emerged from these consultations. VSRs are deeply committed to helping veterans navigate the VA and receive the benefits they need. They face many challenges in their jobs, including a growing number of complex claims, staff attrition, and intense productivity pressures including the

“three minute rule”. (VSRs are instructed to comply with both a three minute limit for length of call and a three minute limit on length of time how long caller waits in the queue.) Although phone inquiries are typically not very case specific, the responses often last more a few minutes, especially if corrective action is needed or specialized information needs to be retrieved. Call records are rarely kept because VSRs do not consistently get case numbers due to the nature and pace of the calls.

This commitment is evident in the time and effort they devote to mastering their jobs. On any lunch hour, one can find VSRs meeting in study groups that they have formed with co-workers to expand their benefits knowledge. VSRs regularly bring handbooks and other materials home to keep abreast of new developments. These impressive self-study efforts are an excellent complement to – but not a replacement for – on-the-job training involving actual cases and computer help aids.

The other common theme that emerged is that management typically views VBA telephone service as a low priority, i.e. as an afterthought not worthy of adequate staffing, training, and orientation on computer help aids. The old model of specializing in Public Contact has been largely replaced by one where VSRs answer phones part-time, or only rotate into the unit during peak hours. Even more troubling, some VSRs must split their time between the phones and the more in-depth task on developing a single case with a limited number of issues. VSRs find it very hard to “switch gears” and alternate between these two very different job duties. VSRs assigned to both teams get no ASPEN

productivity points for phone time and have less time to meet case development quotas.

In the words of one VBA employee, management considers telephone service to be a “no brainer”. As this study showed, Public Contact is *far* from a “no-brainer.” Veterans deserve better. They deserve top quality assistance when they call VBA. AFGE provides the following recommendations for achieving that goal.

#### THE MYSTERY CALLER STUDY

AFGE would like to be included in future efforts to measure and improve VBA effectiveness. We only learned about this study after it was completed. AFGE and front line VSRs have valuable expertise to share in this regard. We have some concerns about the questions and measures used. For example, the “willingness to help” measure seems particularly subjective: an employee answering a spina bifida question was graded as “showing an unwillingness to help” even though he or she offered to have the caller speak to a specialist, checked the specialist’s availability and then offered to leave a message with the specialist to call the veteran’s relative back. The question about education benefits for a surviving spouse reveals confusion within VA policy about when referrals should be made. Our members are strongly advised to consult others with more expertise or refer callers to 800 numbers for specialized areas such as vocational rehabilitation, loan guaranty and educational benefits. Yet this study

assigned a higher grade to an employee who chose *not* to refer a question about widows' educational benefits.

*Accuracy:* AFGE is pleased that the Mystery Caller study revealed some significant improvements in VBA phone service between 2002 and 2004. Accuracy (measured by mostly correct and completely correct) increased by 20 percentage points — a 233% increase. AFGE agrees that the 22% incidence of completely incorrect answers is unacceptable and avoidable with adequate training, staffing, supervision and technical support.

*Customer Satisfaction:* The 11 point gain in promptness was positive, and most likely, a direct result of increased emphasis on the three minute rule. VA's current priority is to get as many calls answered as possible. VSRs are credited with .125 point for every phone call they take. Most stations have a set production quota of at least 8.0 points, others a 9 or 10 point quota. That means that VSRs must answer a minimum of 64 calls per day. In the words of one VSR, this pace produces a "factory-like" mentality.

The inverse relationship between promptness and customer satisfaction is not unique to VBA. In any venue, an employee facing strict time limits and a long queue of calls is likely to make a customer feel rushed. Additional training and scripted responses will only yield marginal increases in callers' perceptions of courtesy, professionalism and willingness to help.

Veterans have complicated questions about important aspects of their lives; many have limited educations or are elderly or disabled and therefore less able to present inquiries and receive responses in an efficient manner.

Furthermore, some questions need more than three minutes. Some questions require that the VSR consult with someone in a specialized unit such as vocational rehabilitation. Our members report that veterans *appreciate* hearing back from the VSR with the additional information.

In the words of an employee who handles phone inquiries and case development at the same time: “It is my opinion that when an employee has their career, or their pay scale in jeopardy because they are not cranking out production, quality is one of the first things to suffer.”

## HOW THE PUBLIC CONTACT FUNCTION IS STRUCTURED AND STAFFED

### *The Phone Room Era*

Prior to implementation of the Claims Processing Improvement (CPI) model several years ago, Public Contact (called the “phone room” at that time) was a specialized function. Employees providing phone assistance were called Veterans Benefits Counselors and they typically worked only in that unit. They handled the phones full-time and most brought significant VBA experience and knowledge to the position. Many preferred phone duty over other assignments. According to one VSR, these Veterans Benefits Counselors were “the best of the best”. In 1999, the Veterans Benefits Counselor and the Adjudicator positions merged. Several years later, the CPI model was implemented.

### *Implementation of CPI*

The quality of VBA phone assistance has declined under the CPI model. The requirement that new employees be rotated through all teams prior to

servicing in Public Contact was never fully implemented. Therefore, employees assigned to Public Contact often lack key skills. In addition, specialized training for each team was very uneven. As a result, it is likely that employees with only a few years of experience who are assigned to Public Contact lack phone training altogether.

Reports from our members about current Public Contact operations have one consistent theme: no consistency. A handful of ROs retain the old “phone room” model of specializing in Public Contact with excellent results; they call it their “best kept secret.” VSRs answering phone inquiries in those ROs average 15 to 20 years of experience in benefits and customer service and they *want* to be there. Senior VSRs in several ROs report that they received far more extensive training in their early years than is offered today.

Other ROs have taken a more haphazard approach to Public Contact since the CPI model was instituted. Smaller ROs are at a particular disadvantage; they lack the staff to devote any VSRs to full-time Public Contact. Rather, they must perform both phone duty and case development simultaneously, or rotate into Public Contact for short periods of time.

In larger ROs, full-time assignments are more the norm. Full-time exposure to the job is not enough, however. Training, supervision, and aptitude also are essential. Public Contact assignments are not always based on the best criteria. Employees are sometimes assigned to phone duty because of spikes in demand or staffing shortages, even though they lack experience and training. Others end up in Public Contact because they failed to production goals

elsewhere. Too often, both front line VSRs and their supervisors lack experience.

This type of staffing is a great disservice to veterans. Handling phone inquiries competently requires subject area expertise and excellent communication skills tailored to the audience. Public Contact is not a one-size-fits-all job. Public contact is a demanding job that involves specialized skills, e.g. retrieving and explaining technical information in a short period of time, and communicating complex concepts in a manner that is accessible to the caller. Employees should be assigned to Public Contact because they have the appropriate skills, training and aptitude for that position. Experienced supervisors should be assigned to the Public Contact to help raise skill levels of underperforming employees.

The demands of the Public Contact position are often underestimated. In addition to handling a constant stream of calls, VSRs have other time-consuming duties, such as tracking down files, taking corrective action, or consulting with a supervisor or the VSR developing the claim. In contrast to staff at Pension Maintenance Centers, VSRs in the Public Contact unit have almost no “down time” for phone follow up

All VSRs should go through rotations in other teams before answering inquiries covering every possible benefit area. In addition, VSRs with fewer than five years of experience will not be facile enough to achieve high levels of accuracy and customer service, and need ongoing training and intense supervision.

## RECOMMENDATIONS FOR IMPROVING ACCURACY OF RESPONSE

### *Seniority:*

Experience is the number one ingredient for boosting accuracy. Every year, Congress expands or amends veterans' benefits, adding to an already enormous knowledge base that must be mastered by the VSR. Veterans call in with questions ranging from how to get a flag to whether they are entitled to benefits under Paragraph L. Sometimes thousands of dollars per month are at stake. In addition, VSRs must comply with medical privacy requirements that have greatly expanded in recent years. The increased emphasis on a seamless transition from DOD to VA presents additional challenges.

The well documented problem of significant VBA workforce attrition through retirement wields a double blow to efforts to increase accuracy: the VBA workforce is shrinking, and it is losing its most expert employees, mentors and supervisors.

New training initiatives will only be effective if supervisors and instructors are sufficiently experienced. Seniority also is the best cure for "VBA-ese". The more mastery someone has over a subject, the less he or she needs to rely on technical jargon such as the "1151 claim" and "Paragraph 29".

*Training:*

Our members expressed very positive views on the new centralized training initiative and other changes announced in VBA Letter 20-06-04 such as uniform training curriculum; mandatory participation, more uniform and accessible written and online tools, and stringent quality control. VBA's ability to conduct silent monitoring will be limited by the amount of time that a supervisor can devote to observing one employee at a time.

To maximize the effectiveness of any training program, full rotation through the entire claims process *and* completion of all training modules are essential. Training is often treated as an optional activity that can be squeezed in by "15 minutes here or 90 minutes there." Some VSRs report that they have never been shown the training videos referenced in VBA Letter 20-06-04. The primary document relied on for training, "Federal Benefits for Veterans and Dependents", is a public education booklet, not an employee manual. Customized training materials are needed if Public Contact personnel are to achieve professional standards.

Weekly VSR meetings in the Public Contact unit are helpful for learning about new legislation and ways to handle certain types of calls. These should be held consistently and for all Public Contact staff.

Again, it takes many years for a VSR to learn and effectively explain so many benefits concepts. New VSRs should only be assigned to Public Contact after full rotation to other teams, completion of training and with an experienced supervisor.

### *Computer Help Aids*

Current computer-based training and help aids need to be updated. VSRs complain of “programs that don’t talk to each other” and “computer systems that are unreliable.” Tools such as BDN, Map-D and COVERS help answer questions but sometimes lack needed details. They also feel that too much emphasis is placed on learning systems that track claim status rather than substantive knowledge such as specific benefits and the process for making service-connected disability determinations.

AFGE is pleased to see that the ADVISOR program is slated for a long overdue revision. Another suggestion that applies beyond the Public Contact unit would be to move ADVISOR from the intranet to the internet so that VSRs could cut and paste important language.

Even the best computer help aids will not yield professional results if VSRs are not properly informed or and trained on all the necessary screens. VBA needs to insure that all VSRs have quick access to and facility with all computer help aids.

In addition, a modest software change would help VSRs determine the stage of a veteran’s claim more accurately and quickly. Currently, only the name of the VSR handling the claim is available. VSRs also need to know which unit the case is currently assigned to, e.g. pre-determination or post-determination.

## CONCLUSION

The keys to effective training and quality improvement in the Public Contact unit are adequate staffing, experienced managers and sufficient training in subject matter; customer service and computer help aids. The “force of quotas”, in one VSR's words, will continue to take its toll. Therefore, gains in accuracy are more likely to be achieved than gains in customer service, especially if the three minute rule remains in force without additional staffing.

Many VSRs feel that there is much to be learned from the old, more specialized Public Contact model. A number of front-line supervisors have expressed interest in returning to that unit. VSR positions in a separate Public Contact unit should be classified out at the same level as Service Center VSRs; Equal pay and prestige will ensure recruitment of experienced and top notch employees for the challenging Public Contact position.

AFGE and its VBA employees urge the Subcommittee to ensure that we have opportunities to weigh in on efforts to improve quality of VBA services, including the June 2006 Public Contact Team Workshop being held in Nashville.

AFGE greatly appreciates the opportunity to submit our views and recommendations to the Subcommittee on Disability Assistance and Memorial Affairs. We look forward to working with Chairman Miller and Ranking Member Berkley to ensure adequate employee training and staffing for the handling of telephone inquiries at VA regional offices.