

VA



U.S. Department
of Veterans Affairs

Generative Portfolio Level User Research (VES)

6 Week Research Effort Results and Next Steps

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Agenda

- Overview (5 mins)
- Research Findings (25 mins)
- Next Steps (20 mins)
- Extended PoP Options (5 mins)
- Questions (5 min)

Overview

Project Goal

Mission

Understand the high to mid-level challenges in VA customer and employee experience, beginning with Veterans, with the experience of eligibility and enrollment.

What We Accomplished

Task	Deliverable
Explore how Veterans determine eligibility and enroll in VA benefits	<ul style="list-style-type: none">- Collection/summary of existing E&E research
Understand Veteran pain points in the eligibility and enrollment process	<ul style="list-style-type: none">- Research plan for Veteran interviews- Conversation guide for Veteran interviews- User Journey & Affinity Diagram- Research report
Suggest future research projects based on initial high-level findings	<ul style="list-style-type: none">- Roadmap/backlog for future additional research
Identify an intake process and prioritization for subsequent work	<ul style="list-style-type: none">- Prioritization framework
Develop long-term strategy/scaling model to extend research after 10/21	<ul style="list-style-type: none">- Vision/plan for a VES Portfolio-level research practice

Research Methodology

Methodology

- 16 interviews:
 - 15 Veterans
 - 1 family member
- Interviews conducted remotely between September 12th and 16th, 2022
- Our team asked open ended questions to encourage participants to share their stories

Participant Demographics

15 Veterans Interviewed

Dates of Separation

- 1970s (1)
- 1980s (1)
- 1990s (3)
- 2000s (1)
- 2010s (8)
- 2020s (1)

Benefits Used

- Healthcare and Disability (15)
- Education Benefits (8)
- VRE Program (3)
- Home Loan Program (3)

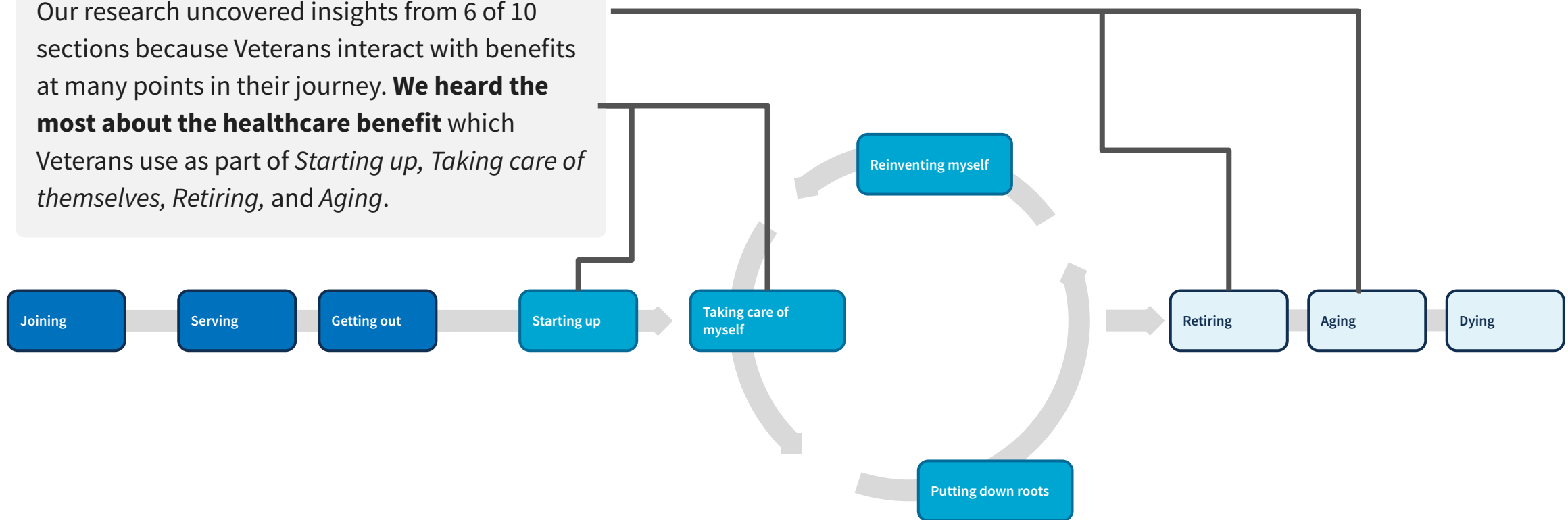
Branches Represented

- Army (8)
- Air Force (4)
- Marine Corps (2)
- Navy (2)

Research Findings

How this research maps to the Veteran journey

Our research uncovered insights from 6 of 10 sections because Veterans interact with benefits at many points in their journey. **We heard the most about the healthcare benefit** which Veterans use as part of *Starting up*, *Taking care of themselves*, *Retiring*, and *Aging*.



For a fully detailed Veteran journey, go to
<https://github.com/departement-of-veterans-affairs/va.gov-team/blob/master/platform/design/va-product-journey-maps/Veteran%20Journey%20Map.pdf>

Top Level Findings Summary

1. Veterans' experiences with enrollment **vary by benefit**
2. Veterans get the majority of benefit information from **non-VA resources**
3. Veterans who separated **more recently** receive more benefits information from the VA
4. Veterans **do not** recognize eligibility and enrollment as separate processes



INSIGHT

The theme of **support** is the thread that runs through all of our findings.

Veterans' experiences with enrollment vary by benefit

Veterans had a much more positive experience with VA home loan and education benefit programs

- Less complexity and increased support lead to a lower administrative burden and a better experience

Veterans struggled with the process of obtaining disability and healthcare benefits

- With a more complex eligibility and enrollment process, the administrative burden was very high unless the Veteran worked with a VSO for increased support

“

"I don't have negative things to say about the education enrollment and benefits acquisition process."

-Participant 19

“Health stuff . . . like a new claim that I believe to be service connected I will always go to a VSO and I will always . . . advise others to go to a VSO too.”

-Participant 19

Top Level Finding 2

Veterans get the majority of benefit information from non-VA resources

73%

Mentioned other Veterans (in person or online)

66%

Worked with a VSO

Veterans who separated more recently receive more benefits information from the VA

- Veterans who had separated from the military more recently were more likely to cite the VA or the separation process as a source of benefit information
 - These didn't replace other sources of information; Veterans who had separated more recently reported getting benefit information from more sources
- Veterans who separated more recently enrolled in healthcare benefits much closer to the time of their separation
 - The Veterans that we spoke to who separated between 1970 and 1999 took an average of about 25 years to enroll in healthcare; for Veterans who separated between 2000 and 2022 the average was less than 1 year
 - We would need more research to learn about the causes of the shorter timeline

Top Level Finding 3

Veterans who separated more recently receive more benefits information from the VA

- Veterans had widely varying experiences with the separation process, a key moment in their relationship with the VA
- Communication about benefits seems to have improved over time, but still has a ways to go.



“Back then it wasn't that much; it was a talk to you and go – compared to what I hear they do today.”

-Participant 22, separated in the 1980s, describing his separation experience

"Useful as a screen door in a spaceship."

-Participant 4, separated in 2018, describing her TAPs class experience

“Make sure that they go to TAP twice and try to get into an in-person one. Because the Zoom ones, you don't get the information out of it.”

-Veteran participant in VEO Transition Project Research

Veterans do not recognize eligibility and enrollment as separate processes

- Veterans describe their primary challenges as Awareness and Enrollment, and mention Eligibility infrequently.
- We recommend doing further research on this topic because our study happened to have a very large percentage of participants with a high disability rating, which simplifies eligibility. We hypothesize that Veterans with lower ratings, or without a rating, will have a more difficult time determining which benefits apply to them.

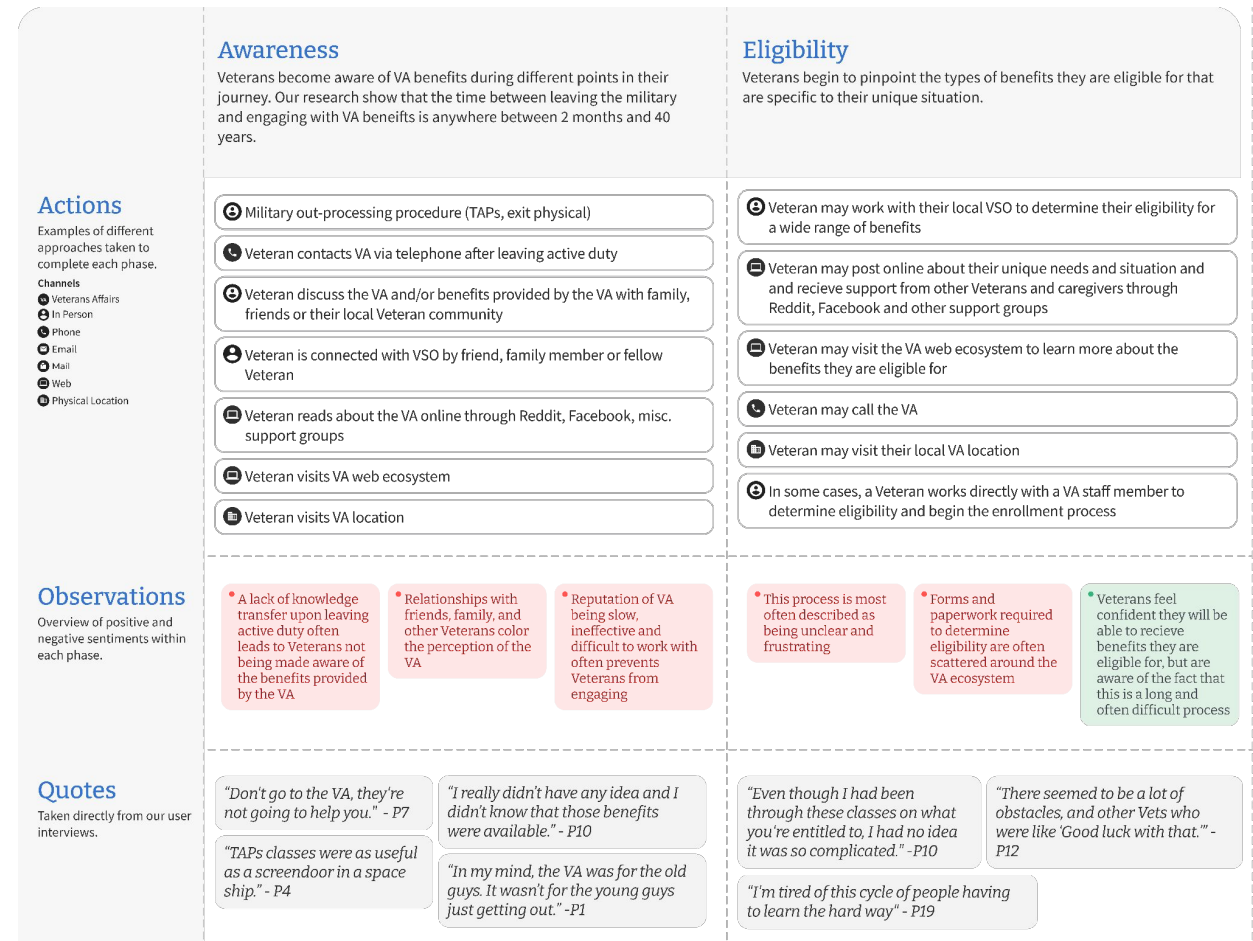
Affinity Diagram



Eligibility & Enrollment Veteran Journey

We've also provided an end-to-end User Journey that helps see some of the nuances Veterans encounter.

This artifact looks into the four stages a Veteran goes through during the enrollment & eligibility process – **awareness, eligibility, enrollment and coverage** – we can observe the different actions and possible routes to complete each stage, accompanied by general observations and supporting quotes from our interviews.



Next Steps

Future Strategies

Investing in strategies and processes will lead to a mature portfolio level research practice that connects research insights to product prioritization.

How we will get there:

- Research roadmap and backlog
 - Roadmap gives broad overview of future research needs and general priority
 - Backlog includes tactical plans about hypotheses, additional research questions, research methods, and timelines
- Research prioritization framework
- Portfolio level research practice

Working hypotheses and our results

There were several working hypotheses posed at the beginning of this research:

- Eligibility and enrollment should be pulled apart into two functions
- Showing Veterans everything they are eligible for would be valuable and is technically feasible
- Universal enrollment for all benefits across the VA would be valuable
- There's enough traction/need for research at the portfolio level

Our research showed:

- There are early signals that could support some of these hypotheses, but more exploration is needed
- Our roadmap addresses the gaps for further validation:
 - Additional research for Veterans that have lower disability ratings
 - Portfolio research practice ecosystem research

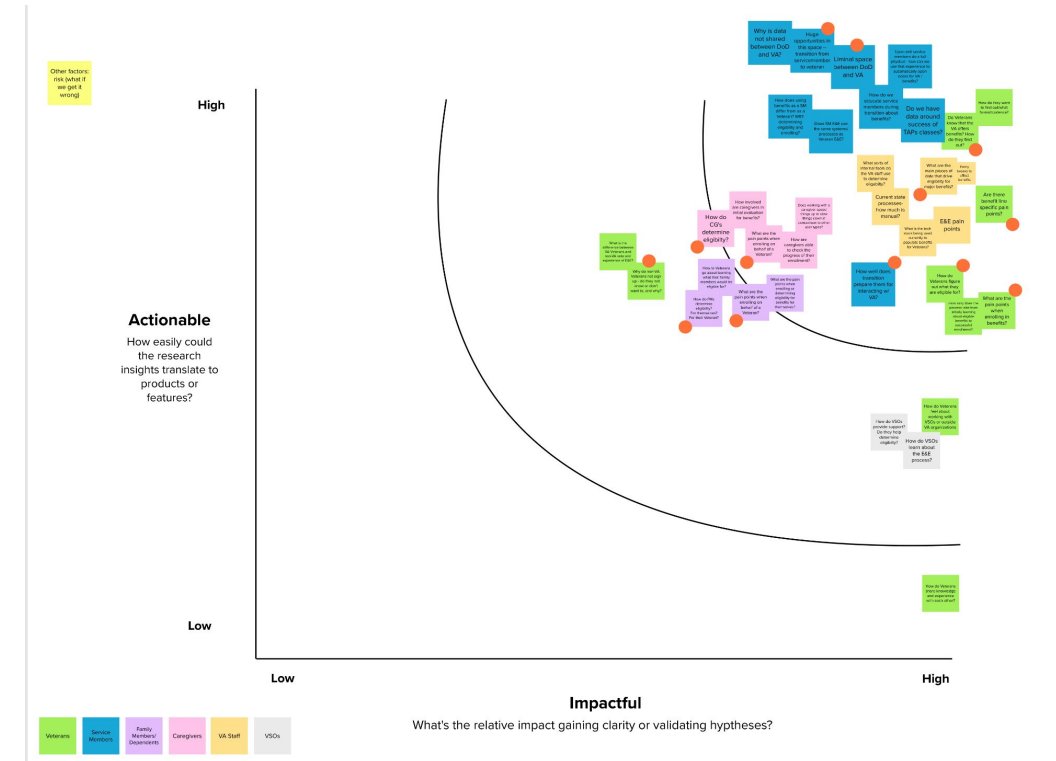
Research Roadmap

Now Phase 1 (July-Sept)	Next Phase 2 (Q4 2022)	Later Phase 3 (2023)
Veteran Eligibility and Enrollment Experience What are the pain points of determining e&e for Veterans?	Portfolio Practice Research How could a portfolio practice research team best work within the existing research structure at VA? Validate Veteran Findings What are the enrollment and eligibility pain points for Veterans with lower disability ratings?	Service Transition Preparation How might we increase visibility of VA benefits for transitioning service members? Why is there such a wide gap between end of service and enrolled in benefits between older and younger Veterans? Caregiver & Family Member Eligibility and Enrollment Experience What are the pain points of determining e&e on behalf of a Veteran and for themselves? Veteran Service Organizations How do VSOs provide support to Veterans during the e&e process? How do they help determine eligibility? Non-VA Veteran Motivations and Attitudes Why do Veterans not enroll in VA benefits? How might we increase visibility for Veteran who are not engaged?

Research Prioritization Framework

Research prioritization is a **collaborative process** that includes identifying and comparing research topics with the purpose of strategically prioritizing research needs.

- A continuous exercise completed on a regular cadence (quarterly to begin, adjust as needed)
- Involve key stakeholders to build connections vertically and horizontally
- Ensures team stays focused on the most impactful work that can be consumed by product teams



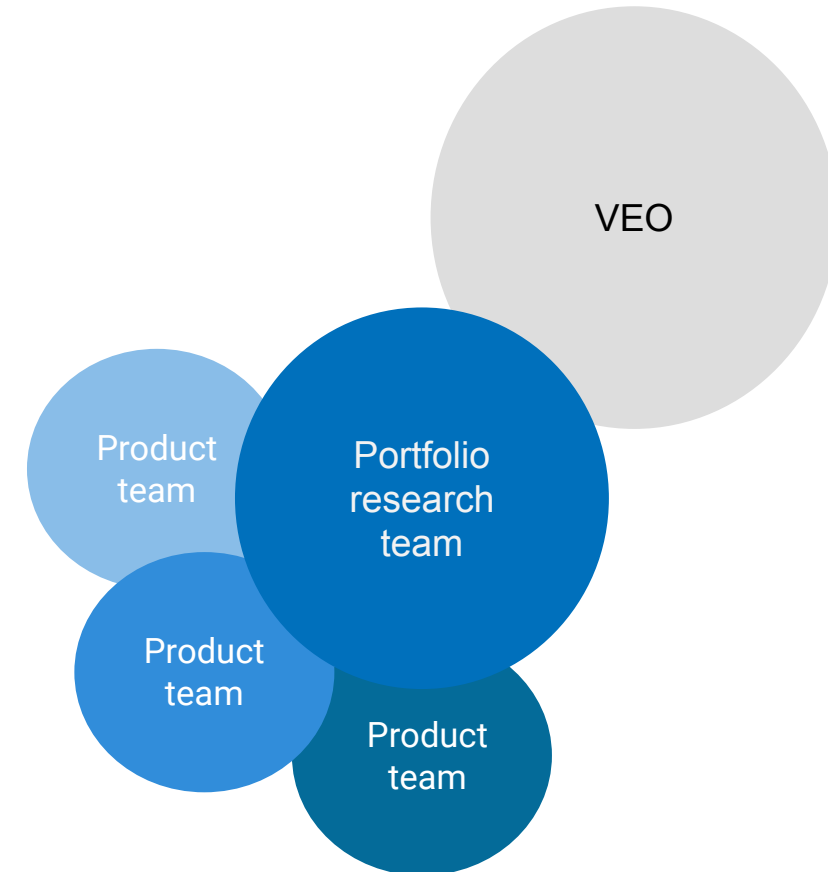
Portfolio Level Research Practice Needs

Current state

- Research happens at VEO level, and as needed at a product level
 - Limited connections = lower efficiency of knowledge sharing, duplicated efforts
- No strategic level research to identify product opportunities at the portfolio level
- Creates problems for long term planning and cohesiveness across the portfolio

To solve this, we propose our team will:

- Lead the development of a Veteran-centered, service design based research practice at the VES portfolio level
- Be the connective tissue that syncs across the portfolio research and product teams
- Create the channels needed to support knowledge sharing between verticals (VEO/portfolio/product) and horizontals (research and product teams within the portfolio)



Implementing a Portfolio Level Research Practice

- **Conduct ecosystem research**
 - What other product/research teams are there in the portfolio? How do they currently connect with each other?
 - When has VEO research successfully trickled down before? Leverage what worked, and improve on what didn't with past studies
 - *In backlog and ready to work on, see Research Roadmap*
- **Build knowledge sharing mechanisms**
 - Leverage existing syncs with other research teams
 - We are working in parallel and sharing research results with the ES modernization team
 - Develop new channels or meetings
 - E.g. slack channels, product+research syncs, portfolio-level research share-outs
- **Develop processes and best practices**
 - Based on ecosystem research, identify how to increase communication between the VEO research practice, the Product research teams, and the new Portfolio level research team
 - Develop agreements on how this team can proactively feed research insights into product prioritization

Extended PoP Options

Extended PoP Options

Recommendations:

- Begin ecosystem research for implementing a portfolio level research practice

10/21 Outcome: Initiate conversations with VEO and product level research groups

If extended past 10/21, outcomes would include:

Recommendations on how to collaborate with VEO and product level research groups; identify opportunities for knowledge sharing mechanisms and process and best practices development

- Build upon Veteran narratives into a Jobs To Be Done artifact



ADDITIONAL OPTIONS

- Begin scoping “Q4 2022” projects in research roadmap
Outcome: product outlines, research plans, and conversation guides
- Identify potential quantitative data resources (e.g. VSignals, Medallia, Google Analytics from VA.gov enrollment forms, ES and other backend system data)

Questions

Appendix

- [Veteran Enrollment & Eligibility User Journey](#)
- [Affinity Diagram](#)
- [Veteran Quotes](#)
- [E&E Qualitative Data](#)
- [Representative Research Tracker](#)
- [Research Prioritization Mural](#)
- [Summary of Legacy Research](#)
- [Research Report](#)
- [Research Backlog](#)