



**US** BY THE PEOPLE  
FOR THE PEOPLE  
WITH THE PEOPLE

Government Engagement Session

*July 12, 2023*

# Transforming Government Service Delivery

*“We have to prove democracy still works, that our government still works and can deliver for our people.”*

*President Biden  
April 28, 2021, in his first joint address to Congress*

*“You shouldn’t have to know how to  
know.”*

*President Biden  
December 13<sup>th</sup>, 2021*

*When the American public interacts with their government, they should get a simple, seamless, and secure customer experience that's on par with top consumer experiences*

# Building on previous efforts

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- Bush (I) Administration: [Customer Service Week](#) (1992)
- Clinton Administration: “Reinventing Government” (run by VP) had “Customer Service” as a core pillar; [Customer Service Standards EO](#) (1993)
- Bush (II) Administration: Creation of “[Office of Citizen Services and Communications \(OCSC\)](#)” (now FCSF) at GSA (2002)
- Obama Administration: Creation of PIF (2010), [Streamlining Service Delivery EO](#) (2011), [PMA CAP goal on Customer Service](#) (2012), USDS (2014), [Core Federal Services Council](#) (2016)
- Trump Administration: [CAP goal on Customer Experience](#) (2018), A-11 Section 280 (2018), [25 High Impact Service Providers](#), Pilot Life Experiences (2018-2020)
- Biden Administration: 35 High Impact Service Providers, PMA Priority Area (1 of 3), Customer Experience Executive Order (2021), 5 Designated Life Experiences (2022), CX Team at OMB (2022), Life Experience Projects (2023)

*Implement the Executive Order on  
Transforming Federal Customer  
Experience and Service Delivery to  
Rebuild Trust in Government.*

*Commitment 1*

# E.O. 14058: Primary Components with Deliverables

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## **SECTION 4: Specific Agency Actions**

Near term, concrete commitments for how agencies are acting to improve services, including:

- New online passport renewal experience
- Testing use of WIC benefits for online purchasing
- Veterans Affairs mobile app

## **SECTION 5: Government-wide Actions**

New frameworks for tackling integrated experiences, including:

- Organize interagency teams around life experiences, selected by PMC and EOP, and report biannually to Chief of Staff to the President
- OMB Director as resolution path for interagency data sharing or agency responsibility debates
- Simplify and streamline processes for data sharing and information collections related to experience improvements

## **SECTION 6: Ongoing Accountability**

Reinforces much of A-11 Section 280, including:

- OMB designating HISPs
- HISPs following OMB guidance on service designation, assessment, action planning, collecting feedback
- OMB establishing a cross-functional team to coordinate

## **SECTION 7: Additional Actions**

Efforts that ALL agencies can take to embed a customer-focused approach:

- Integrate CX into strategic plans, agency performance plans, and SES performance plans
- Improving digital CX by modernizing agency websites, using HCD methodologies
- Utilize flexibilities to increase user testing and customer research

# 2022 Cycle Designated Life Experiences

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2022 CYCLE

## Approaching retirement

Social Security benefits and Medicare are two of the bedrock federal programs in the United States, almost universally enrolled. Yet, irrespective of income, education level, and race, navigating retirement claiming timing and Medicare enrollment processes are time consuming, confusing, complex, and often require back-and-forth with these two programs.

[Learn more](#)



2022 CYCLE

## Facing a financial shock

Because of complex and burdensome application and payment systems, millions of American families miss out on help getting food, health insurance, and other supports to build better lives for themselves and their children when facing a financial shock like an unexpected medical bill, the loss of income, raise in rent or loans coming out of deferment.

[Learn more](#)

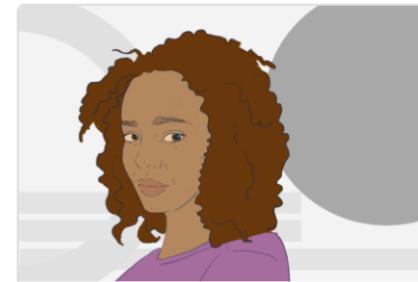


2022 CYCLE

## Recovering from a disaster

Those who have lived through a natural disaster are facing one of the most difficult experiences they've ever encountered: attending to their families' most basic needs while experiencing trauma, stress, and multiple bureaucratic processes. In these most vulnerable moments, survivors expect the government to step up.

[Learn more](#)



2022 CYCLE

## Having a child and early childhood for low-income families

There were 3,605,201 births in the United States in 2020. 42 percent of these were covered by Medicaid. With almost a quarter of all workers having a child under five, this life experience impacts millions of Americans.

[Learn more](#)



2022 CYCLE

## Navigating transition to civilian life

Separating service members face reorienting their civilian lives around key domains, including: education, employment, health, finance, housing and social relationships, but quantitative and qualitative data suggests that around half of all recently separated Veterans may not connect with available resources, benefits, services and tools for several years.

[Learn more](#)

More: <https://www.performance.gov/cx/projects/>

## Example charter: Having a child and early childhood

# Life Experience Designation Charter

## Having a child and early childhood for low-income parents and children

On December 13th, 2021, President Biden signed E.O. 14058, *Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government*, which charges members of the President's Management Council (PMC) to form interagency teams, coordinated by OMB, to designate and assess cross-agency customer life experiences, work to develop measurable improvements for such customer life experiences that involve multiple agencies, develop prospective plans to rigorously test what works, and share lessons learned across the Federal Government.

This charter establishes the PMC's cross-government effort and interagency team, as envisioned in E.O. 14058, to tackle the designated life experience of **having a child and early childhood for low-income parents and children**.

### Where we are now

Most families making less than 200% of the poverty level do not have the combination of supports that they need to thrive, including access to health care, finances, food, housing, and childcare.

For parents of all income levels, carrying and delivering a child will be one of the most significant experiences of their life — but the stresses and burdens are greater for low-income families.

**Low-income families struggle to make ends meet.** There were 3,605,201 births in the United States in 2020. 42 percent of these were covered by Medicaid. Across all age groups, those most likely to live in poverty are young children. Having a young child is associated with a \$14,850 drop in income for households with two adults, and \$16,610 for single women. While families may have the lowest incomes during a child's first five years of life, and also have the highest expenses, as they have grown their family. Mothers often bear the most of this economic burden, with their paid (and unpaid) labor crucial to their family's stability.

**Economic insecurity contributes to poor health outcomes.** In part because of our lack of a social safety net, with a focus on healthcare coverage the U.S. has one of the worst maternal mortality rates of any developed nation, more than double that of most other high-income countries. Leading causes of pregnancy-related deaths in the U.S. include

cardiovascular issues and hypertension (and in the postpartum period, during which more than half of U.S. pregnancy-related deaths occur, mental health issues become a leading cause). These high-risk conditions, which disproportionately impact women of color and low-income women, can be improved by access to medical care and proper nutrition, among other interventions in a typical treatment plan.

**Lack of family support impacts economic productivity — especially for mothers.** Furthermore, due in part to lack of access to care supports, women's labor force participation in the United States has stalled. Finding, securing, and paying for child care is out of reach for as many families. Only 15% of those eligible for child care subsidies receive them, indicating that families are forced to pay out of pocket for child care they cannot afford. An analysis from the Economic Policy Institute demonstrates that if child care was affordable and accessible, the United States would see a gross domestic product (GDP) gain equal to \$210.2 billion.

### Where we want to be

We have ample evidence that new families need access to health care services and coverage, and wraparound supports — particularly low-income families and families of color. Medicaid, as the payer of almost half of U.S. births, is an ideal "front door" for low-income families to access not only health care services but also other social services and benefits that they may be eligible for, and existing labor standards that protect them. Access to social benefits such as SNAP and WIC, and access to FMLA and break time for nursing can support a healthier pregnancy and postpartum period for mothers, and have long-term positive benefits for children. This can form the basis for other Federal opportunities for improving maternal health, educational, and other outcomes for families of all income levels.

Our north star is the idea that **every family with a child under 5 should have access to: health care, food, employment security and financial stability, housing, and child care, with a focus on optimizing parents' health and well-being, as well as their babies.**

This project centers on using federal levers to unblock uptake and usage across programs serving the same families and scale models that are working to help parents and families thrive in one state or community to others using existing federal authorities and funding.

### Where we will start

Through the discovery period (Summer 2022), our team will run a discovery sprint with the goal of conducting research and diligence on this holistic model of care for women and the outcomes for infants on Medicaid. We will conduct two phases of qualitative research, focusing on subject matter experts and care delivery professionals, and on individuals and families. We will map the journey of an individual from pregnancy through to the child's entrance into public school, identifying specific points at which various factors (rural, income level, race, LGBTQ+) may create inequitable "drop off points," as well as pain points for birthing parent of a variety of perspectives.

We plan to identify up to 3 tactical projects that the Federal Government can pursue to improve the family experience for families with children under the age of 5. We will prioritize projects that are in the control of Federal Government levers of change and can be supported by increased interagency cooperation and coordination.

### Collaborating Agencies

Unlike near-term improvements from agency-specific actions, the work and output from the cross-agency life experiences will take months and years to achieve. This work is a transformation in how the Federal Government delivers services. To succeed will require a combination of ongoing leadership from the Executive Office of the President and President's Management Council members, as well as dedicated project teams to drive the work forward.

We, the undersigned, commit to providing talent, expertise, and relevant supports from our agencies, as allowable, to better serve the American public through this integrated, human-centered approach. We will remain oriented around the lived experience of members of the public irrespective of governmental structural silos, involve representatives from organizations across the delivery system (including Federal agencies, State, local, Tribal, and Territorial governments, social and private sector entities), and will engage members of the public (particularly those from underserved communities), to shape our path forward.

Dr. Jewel H. Brionaugh, Deputy Secretary  
Department of Agriculture

Cindy Marten, Deputy Secretary  
Deputy Secretary, Department of Education

Robin Carnahan, Administrator  
General Services Administration

Andrea Palm, Deputy Secretary  
Department of Health and Human Services

Adrienne Todman, Deputy Secretary  
Department of Housing and Urban Development

Jason Miller, Deputy Director for Management  
Office of Management and Budget

Julie A. Su, Deputy Secretary  
Department of Labor

More: <https://www.performance.gov/cx/projects/>

# An iterative approach to implementation

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The life experience concept requires a new model of the Federal delivery system working together—across levels, within agencies, across agencies, and within OMB—driven by customer (human-centered design) research (both quantitative and qualitative), to ***identify specific areas for action rather than rely on pre-decided priorities.***

## ***Phase 1: Designation***

*(Dec - March)*

Source ideas, refine and scope final project charters; PMC members sign project charters; Public announcement of life experiences selected for focus

## ***Phase 2: Discovery***

*(April – September)*

Form teams; develop research plans; interview Subject Matter Experts; field research with the public; synthesis; review of implementation and evaluation options

## ***Phase 3: Develop***

*(October - January)*

Public share-out of findings; design implementation project plan and ongoing project governance structure; stand-up of individual project teams and determine resourcing

## ***Phase 4: Design***

*(February - December)*

Teams begin co-design with agency collaborators and customers; select sites, find partners, pilot first phase of interventions; conduct implementation evaluations; identify components to scale; embed impact evaluation and feedback approach

## **Approach**

- Multi-disciplinary teams: designers, evaluation experts, SMEs, state and Federal program staff
- Minimum bi-weekly readouts of project findings – **ITERATION!**
- Involvement of civil servants in the HCD work
- Interviews with people who have lived this experience
- Non-response bias checks
- Accessible visual artifacts
- Priorities grounded in what the public says are pain points
- Generate templates and processes that can help next time

More: <https://www.performance.gov/cx/projects/>

# Progress on Life Experience Projects

Milestone	Status	Timing	Owner	Notes
<b>NEW Project: Piloting a benefits bundle approach for families navigating supports</b>				
In progress. HRSA/Healthy Start Pilot sites:				
Co-design and pilot a benefits bundle intervention in communities through six pilots with the Department of Health and Human Services (HHS) Healthy Start grantees	<input type="radio"/>	FY23 Q3	<input checked="" type="checkbox"/> HHS (ASPA), GSA Technology Transformation Services (TTS)	Established and developed agencies' authorities to send text messages for critical updates such as deadlines and program information
Partner with up to three benefits programs to send the first pilot messages via the notification service	<input type="radio"/>	FY23 Q3	HHS (ASPA), HHS Administration for Children and Families (ACF), GSA (TTS)	In progress.
Assess the success of the pilots and provide a deliverable of lessons learned	<input type="radio"/>	FY23 Q4	HHS (ASPA), GSA (TTS)	Not started. Following assessment, pilot partners will share their experiences and broader learnings with other government entities.
Demonstrate the benefits bundle proof of concept and build the foundation for impact evaluations	<input type="radio"/>	FY23 Q4	<input type="radio"/> HHS (ASPA), GSA (TTS)	Expand product features to help scale the impact of the notification service
Disseminate best practices and lessons learned among Healthy Start grantees or others interested in creating a benefits bundle in their communities, which will include a benefits bundle playbook and training module	<input type="radio"/>	FY23 Q4		Not started.
Build a model for future federal approaches to benefit bundle supports	<input type="radio"/>	FY23 Q4		
<b>NEW Project: Improve federal data services for benefits delivery</b>				
<b>Facing a Financial Shock</b>				
Announce pilot partners and jurisdictions	<input type="radio"/>	FY23 Q2	<input type="radio"/> HHS (CMS)	Examine legal authority for the Centers for Medicare and Medicaid Services (CMS) of HHS to reuse income data from health and human services programs while upholding privacy protections for individuals, consistent with applicable law
Build the newborn supply kit prototype and launch it in three jurisdictions	<input type="radio"/>	FY23 Q3	<input type="radio"/> HHS (CMS)	Produce a baseline report with state needs and opportunities
Conduct an implementation evaluation, including case studies and best practices	<input type="radio"/>	FY23 Q4	<input type="radio"/> HHS (CMS)	Test a prototype to offer multiple income verification data sources to agencies and states
<b>NEW Project: Piloting a newborn supply kit at the time of birth</b>				
Review agency and program use data of existing services to support development of the business model for the design and expansion of the service	<input type="radio"/>	FY23 Q4	HHS (CMS)	In progress.
Propose improved guidance on permissible reuse of income data across programs, including a proof of concept to improve income verifications	<input type="radio"/>	FY23 Q4	HHS (CMS)	Not started.
<b>NEW Project: Piloting text message notifications for critical updates</b>				

More: <https://www.performance.gov/pma/cx/strategy/2/>

*Improve the Service Delivery of High Impact Service Providers and Ensure Ongoing Accountability*

*Commitment 2*

# High Impact Service Providers

 Department of Agriculture	1 Farm Services Agency 2 Forest Service 3 Food and Nutrition Service 4 Natural Resource Conservation Service 5 Rural Development	 Department of Health and Human Services	10 Centers for Medicaid and Medicare Services	 Agency for International Development	20 Agency for International Development	 Social Security Administration	28 Social Security Administration	 Department of Veterans Affairs	33 Veterans Benefits Administration 34 Veterans Health Administration
 Department of Commerce	6 Census 7 United States Patents and Trademarks Office	 Department of Homeland Security	11 Citizenship and Immigration Services 12 Customs and Border Protection 13 Federal Emergency Management Agency 14 Transportation Security Administration	 Department of Labor	21 Employment and Training Administration 22 Employee Benefits Security Administration 23 Occupational Safety and Health Administration 24 Office of Workers' Compensation Programs	 Department of State	29 Passport Services	 Cross-Agency Coordination	35 Recreation.gov
 Department of Education	8 Federal Student Aid	 Department of Housing & Urban Development	15 Housing and Urban Development	 Office of Personnel Management	25 Federal Employment Services 26 Retirement Services	 Department of Transportation	30 Build America Bureau		
 General Services Administration	9 USA.gov	 Department of the Interior	16 Bureau of Indian Affairs 17 Bureau of Trust Fund Administration 18 Fish and Wildlife Service 19 National Park Service	 Small Business Administration	27 Small Business Administration	 Department of the Treasury	31 Treasury Department 32 Internal Revenue Service		

The included entities are identified as High Impact Service Providers (HISPs) and are subject to OMB Circular A-11 Section 280 activities including an annual enterprise-wide CX capacity assessment and action planning, designation of at least two high impact services, improved performance management for designated services, customer feedback collection and public reporting.

<https://performance.gov/cx/>



More: <https://www.performance.gov/cx/hisps/>

# Progress on Service Improvements

## Progress on Agency Commitments in EO 14058

Click on an agency to read more about the progress they've made on individual commitments directed in the Executive Order as of March 2023.

DEPARTMENT OF STATE

+

DEPARTMENT OF THE TREASURY

+

DEPARTMENT OF THE INTERIOR

+

DEPARTMENT OF AGRICULTURE

DEPARTMENT OF LABOR

DEPARTMENT OF HEALTH AND HUMAN SERVICES

DEPARTMENT OF EDUCATION

DEPARTMENT OF VETERANS AFFAIRS

DEPARTMENT OF HOMELAND SECURITY

SMALL BUSINESS ADMINISTRATION

SOCIAL SECURITY ADMINISTRATION

GENERAL SERVICES ADMINISTRATION

UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT

JOINT AGENCY ACTIONS

DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

More: <https://www.performance.gov/cx/executive-order/>

## DEPARTMENT OF STATE

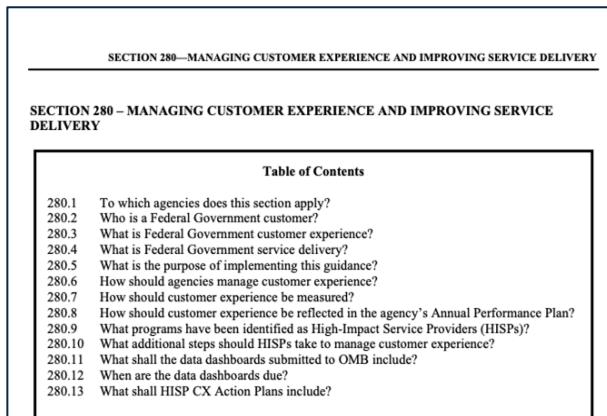
THE SECRETARY OF STATE SHALL:

- “ Design and deliver a new online passport renewal experience that does not require any physical documents to be mailed
  - With an initial goal of reaching 25,000 pilot users from a target audience of Federal employees and contractors in Spring 2022, the Bureau of Consular Affairs (CA) has expanded to a limited public release for continued piloting and improvement of the [Online Passport Renewal](#). As of January 2023, the State Department has processed 169,559 online passport renewals. The limited public release will continue until the full public launch expected later in 2023.
  - CA expanded Online Passport Renewal technical support to customers to include phone support in addition to email from 8am to 8pm Eastern on Mondays through Fridays.
  - The Department of State gathered customer satisfaction data from customers that piloted the use of Online Passport Renewal. To date, more than 12,000 customers have completed a survey during the limited monthly release with 99% of respondents indicating they were very likely to use the online renewal system in the future. Furthermore, 96% of respondents reported that completion of the application was very easy or somewhat easy.

Throughout the first year, we provided updates at 3-month, 6-month, and 9-month mark

# OMB Circular A-11 Section 280

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**Office of Management and Budget  
Circular A-11 Section 280**



Conduct an **annual self-assessment** against CX maturity model



**Designate at least two (2) services** for focused assessment



Develop **action plans** in line with annual agency strategy and budget efforts to improve customer experience maturity and measures



Collect **customer feedback** and submit quarterly for identified moments that matter **along designated service journeys** to be shared on public-facing dashboards

More: [https://www.performance.gov/cx/assets/files/a11\\_2021-FY22.pdf](https://www.performance.gov/cx/assets/files/a11_2021-FY22.pdf)

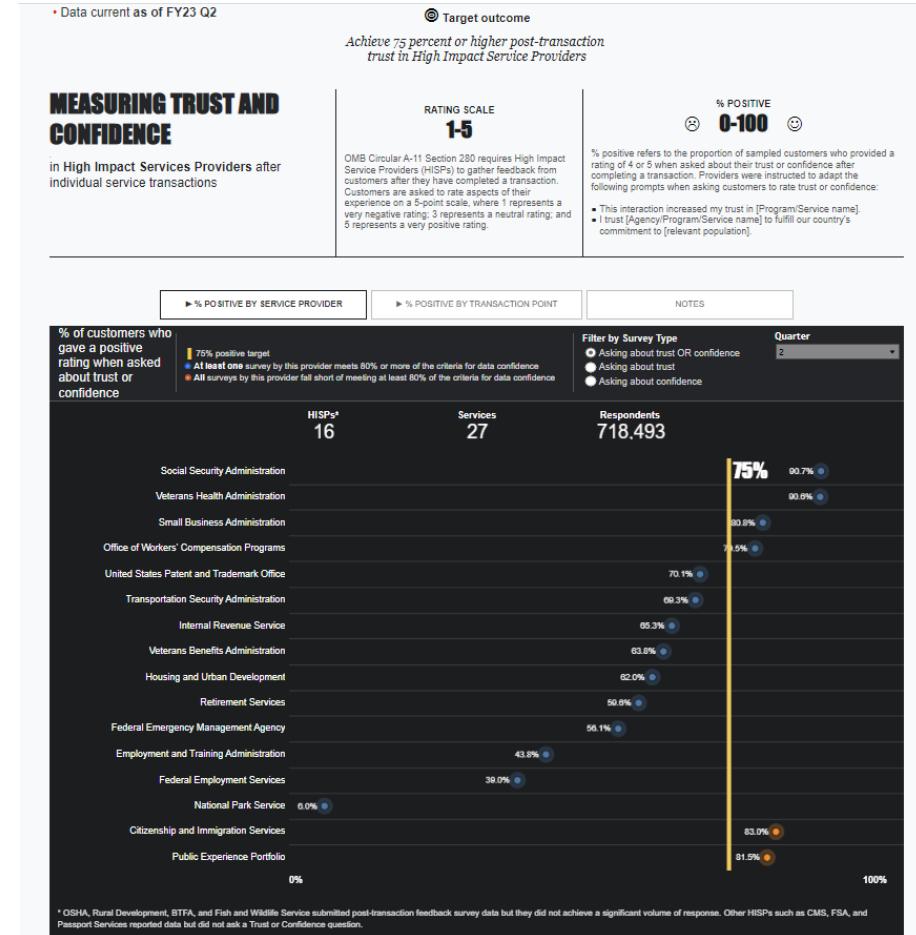
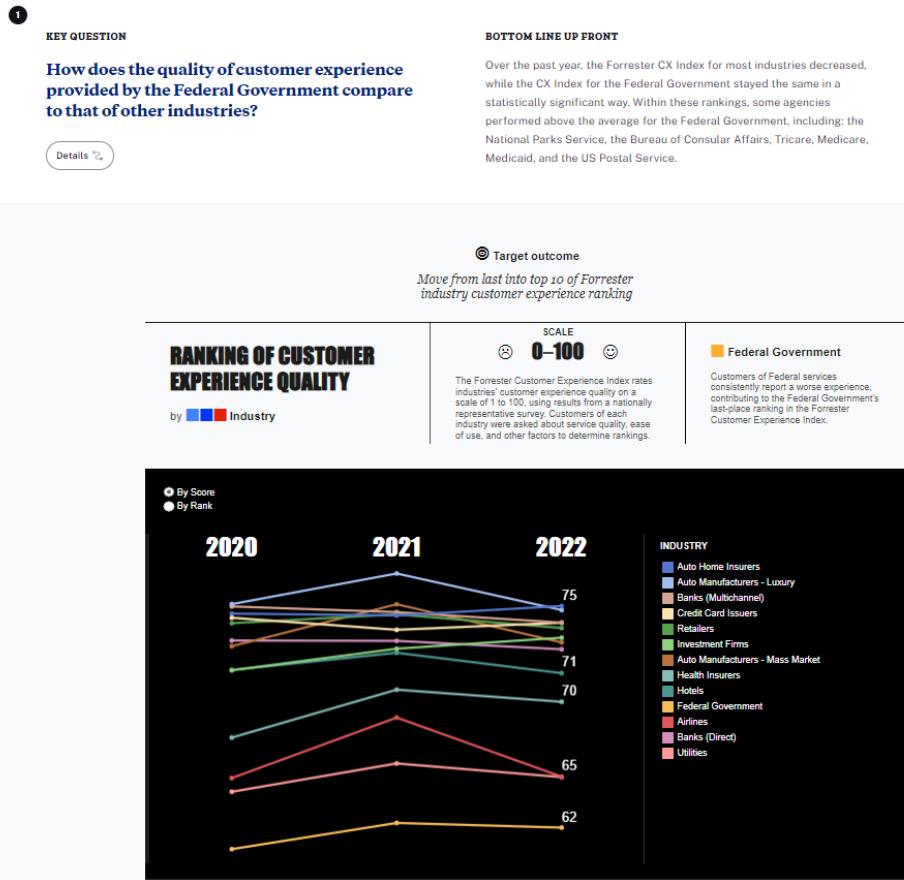
# What drives each of our HISP service experiences?

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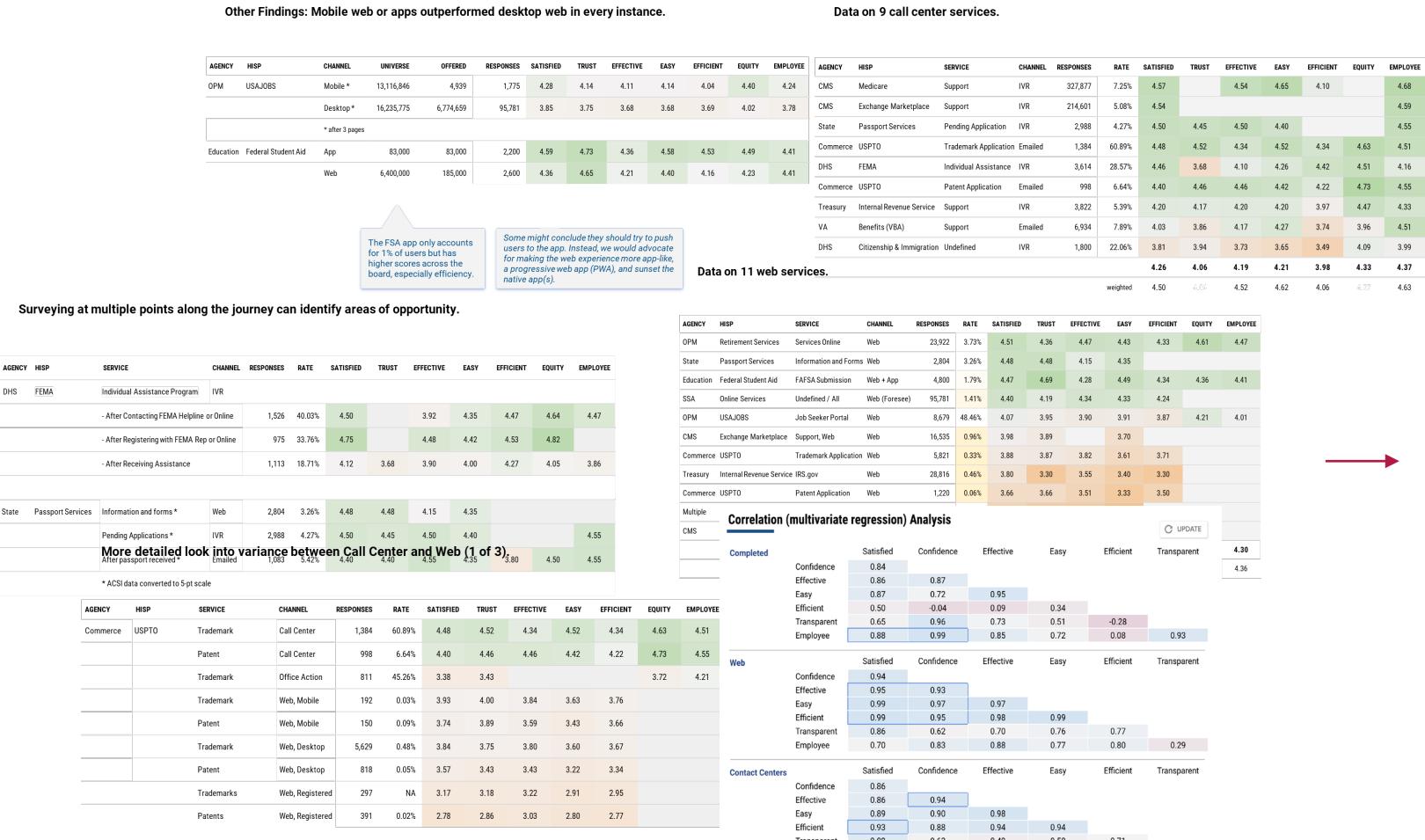
Trust and Experience Drivers	Driver Sub-Categories
<b>Service Performance + Reliability + Consistency</b>	Effectiveness / Value My need was addressed / My issue was resolved. / I found what I needed. / My question was answered.
	Ease / Simplicity It was easy to complete what I needed to do. / It was easy to find what I needed.
	Efficiency / Speed It took a reasonable amount of time to do what I needed to do. / I found what I needed on the site quickly.
<b>Equity</b>	Transparency I was treated fairly / I understand what was being asked of me throughout the process.
<b>Humanity</b>	Employee Interaction / Warmth / Helpfulness / Competence Employees I interacted with were helpful. / The Call Center Representative was committed to solving my problem.



# How are we sharing HISP Feedback Data?



# Some of what we've learned: HISP Feedback Data Analysis



**What have we learned (from a specific data set)?**

Per quarter, we have over 2M survey responses from 210M interactions:

- Trust and satisfaction are average—government thinks 3 or 4 is ok
- We don't have full picture journeys
- We need to humanize our web
- Ease and Efficiency are the highest correlated drivers Satisfaction is higher behind a login screen
- Mobile-first sites and apps have highest online satisfaction rates
- Free text analysis of comments is critical (building this capability now)

# What's next?

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**Federal Student Aid**

1. Having completed the Free Application for Federal Student Aid (FAFSA), I trust FSA to deliver on their mission for the American public.

2. What contributed to your response? Select all that apply.

 My need was addressed   
 It was easy   
 Took the time I expected   
 Instructions were clear

3. Tell us about your experience.

**Internal Revenue Service**

1. Based on my experience calling the IRS, I trust IRS to deliver on their mission for the American public.

2. What contributed to your response? Select all that apply.

My need was not addressed.  
 It was difficult to find what I needed.  
 It took too long to do what I needed to do.  
 I did not understand what was being asked of me throughout the call.  
 I did not understand what was being asked of me throughout the call.  
 The representative was not committed to resolving my issue.

3. Tell us about your experience.

DRAFT

# *Develop and Implement Agency Equity Action Plans*

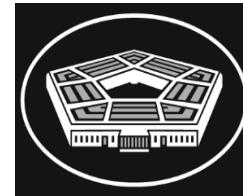
*Commitment 4*

# Progress Made: Delivering on Equity, Access, and Opportunity for the American People

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DOT launched the **Thriving Communities Network**, a multi-agency program to help underserved communities plan for and deliver transformative infrastructure projects.



DOD helped strengthen the **economic security and stability** of service members and their families, including by improving access to quality childcare and enhancing employment opportunities for military spouses.



GSA established **dedicated contracting pools** to facilitate the participation of underserved small businesses in the growing federal marketplace for IT services.



HUD launched a new interactive **housing counseling tool** that includes the option to speak to a customer service representative in over 200 languages during business hours.



DOJ awarded almost \$57M to support **criminal justice reform** and advance racial equity in the criminal justice system at the State, territory, local, and Tribal levels.



HHS approved 35 states and D.C. to extend continuous postpartum coverage through Medicaid and the Children's Health Insurance Program to **improve maternal health**.

# How does the President's Budget for FY24 Advance Equity?

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It makes historic investments to support underserved communities and combat disparities across the Nation, including in health, education, and economic opportunity. For example, it:

- Provides funding to **expand free community college**, and invests \$300M+ in Registered Apprenticeship to **provide debt-free pathways** to careers in in-demand industries.
- Includes \$32M to **expand the Rural Partners Network (RPN)**, an all-of-government program that partners with rural and Tribal communities to help them access resources and funding to support long-term economic stability on their own terms.
- Provides \$4B+ to **advance efforts to upgrade drinking water and wastewater infrastructure**, with a focus on decreasing health disparities in underserved communities.
- Invests \$250M+ to **reinvigorate Federal civil rights enforcement**.
- Provides \$3B for competitive grants to promote and solidify State and local efforts to **reform eviction policies** by providing access to legal counsel, emergency rental assistance, and other rent relief.

# Building on Executive Order 13985: Executive Order 14091

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“Advancing equity is not a one-year project. It’s a generational commitment.”

President Biden  
April 14<sup>th</sup>, 2022



To strengthen the Federal Government's ability to address the barriers that underserved communities continue to face, President Biden signed the new Executive Order (EO) 14091 on **February 16, 2023**.

This second EO reaffirms the Administration's commitment to deliver equity and build an America in which **all can participate, prosper, and reach their full potential**.

# Key Components of the New Executive Order

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1. Launches a new annual process to strengthen racial equity and support for underserved communities
2. Empowers Federal equity leaders
3. Strengthens community partnerships and engagement
4. Invests in underserved communities
5. Improves economic opportunity in rural and urban communities
6. Addresses emerging civil rights risks
7. Promotes data equity and transparency

*Pilot New Forms of Public  
Engagement to Inform Policy and  
Program Implementation*

*Commitment 5*

## *Pilot New Forms of Public Engagement to Inform Policy and Program Implementation*

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Stories of possibility can provide opportunities to express emerging challenges and opportunities through creative and engaging narrative. At their best, stories can inform our collective imagination and create inclusive space for meaningful conversations — and then drive action to choose new possibilities.

The General Services Administration will work with civil society and experts in scenario planning and speculative fiction to develop a challenge and prize competition that will engage diverse and inclusive public participation to better define and imagine emerging challenges, opportunities, and possibilities for our shared future.

## *Roadmap (tentative)*

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August 2023 - Engagement session to discuss proposal for the design of the challenge. Details will be available at <https://open.usa.gov>

Fall 2023 – Challenge is announced with initial engagement sessions to help prompt and shape ideas for narrative development

Early 2024 – Submission period for final stories

Spring 2024 – Finalists announced

*Prioritize Administrative Burden  
Reductions through the Paperwork  
Reduction Act*

*Commitment 3*

July 2023



# Tackling the Time Tax

How the Federal Government is Reducing Burdens to Accessing Critical Benefits and Services



THE HOUSE  
OF REPRESENTATIVES

SECTION

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ARTICLE

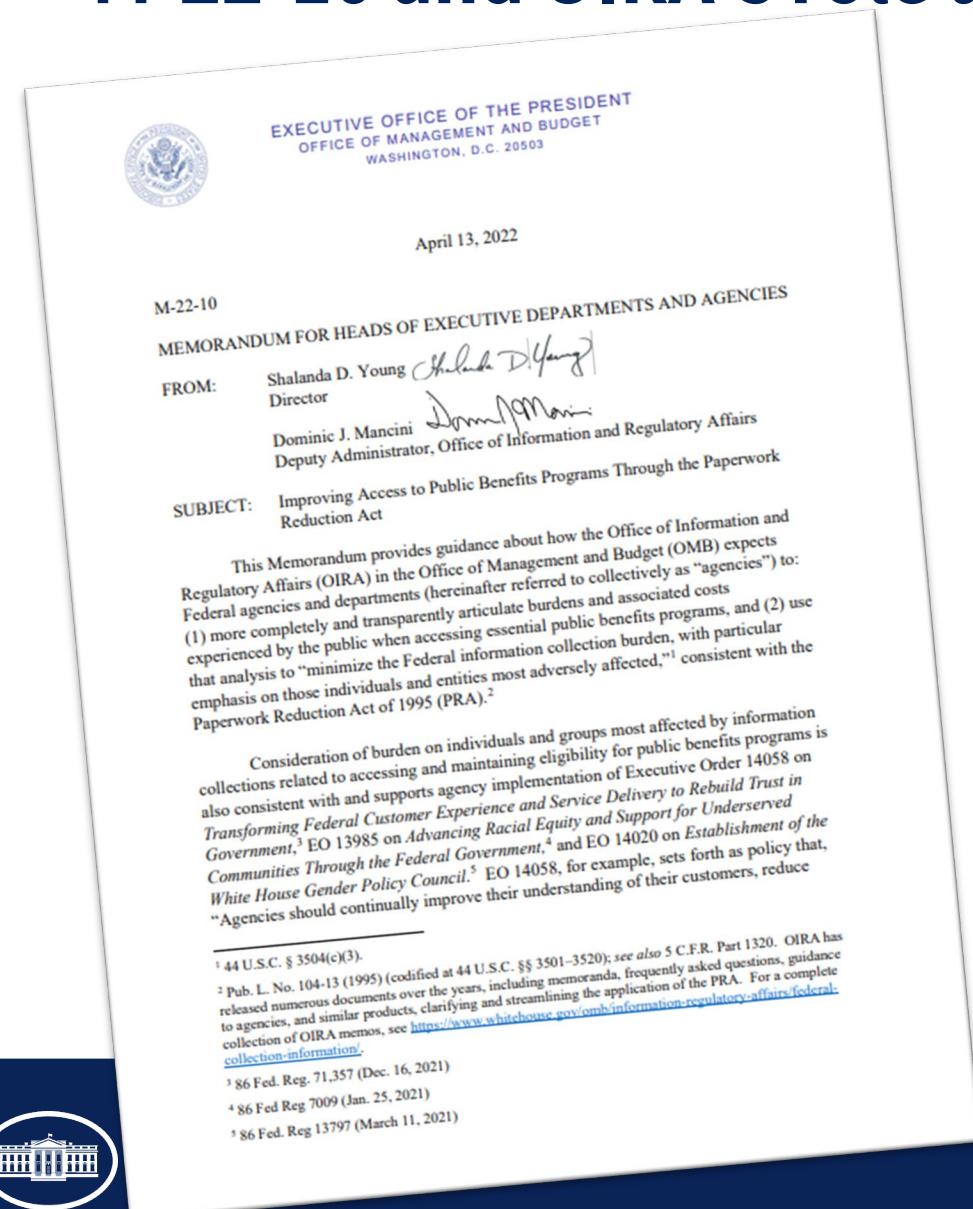
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SECTION

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# M-22-10 and OIRA's role under the Paperwork Reduction Act



- In April 2022, OMB released Memorandum M-22-10, which builds on OIRA's role administering the Paperwork Reduction Act and reviewing Information Collection Requests.
- M-22-10 calls on agencies to:
  - **More comprehensively assess** the beginning-to-end process of completing a form, including applying a more expansive definition of burden; and
  - Take steps to **systematically reduce burdens**, including through form, regulation, and process changes.
- M-22-10 also provides a number of strategies that agencies can use to achieve those goals.

# Current OIRA burden reduction activities

- OIRA staff review of regulations and forms
  - We have incorporated the burden reduction focus into the **regular OIRA review of regulations and forms**, supporting OIRA staff through internal training and resources, and collaborating closely with the OMB CX team on relevant reviews.
- Agency support through tools and interagency working group
  - In addition to M-22-10, we released a memo to agencies **describing evidence-based strategies for burden reduction**.
  - We are convening a **regular working group** of agencies to share lessons, best practices, and tools for burden reduction.
- Burden reduction initiative data call (under Paperwork Reduction Act)
  - We issued a **data call** to agencies to collect ongoing burden reduction efforts and info on implementation of M-22-10. **This data call informs the report we are releasing this week, with over 100 initiatives from 20 agencies.**



# OIRA's Burden Reduction Report

- The report summarizes lessons from the data call, and features in-depth case studies from **DOL, USDA, SSA, ED, HUD, and DHS**, as well as shorter descriptions of ten other efforts.
- Key strategies used by agencies:



- Automatically making individuals or families eligible for one program based on those individuals' or families' eligibility for a related program;
- Reducing the need for individuals to produce additional documentation or paperwork to continue receiving benefits or services;
- Simplifying forms, including by using plain language, eliminating unnecessary questions, and allowing online form submission;
- Using data agencies may already have on file to reduce the amount of information requested of individuals or families, including by sharing data among different government agencies, as appropriate;
- Partnering with community-based organizations to provide information or assistance about how to apply for benefits and services; and
- Providing government services and benefits in more languages tailored to local community needs.



# Appendix

# What is “Federal Customer Experience”?

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- (a) The term “**customer**” means any individual, business, or organization (such as a grantee or State, local, or Tribal entity) that interacts with an agency or program, either directly or through a federally-funded program administered by a contractor, nonprofit, or other Federal entity.
- (b) The term “**customer experience**” means the public’s perceptions of and overall satisfaction with interactions with an agency, product, or service.
- (c) The term “**customer life experience**” means each important point in a person’s life at which that person interacts with one or more entities of Government.
- (e) The term “**High Impact Service Provider**” (HISP) means a Federal entity, as designated by the Director of the Office of Management and Budget (OMB), that provides or funds customer-facing services, including Federal services administered at the State or local level, that have a high impact on the public, whether because of a large customer base or a critical effect on those served.
- (f) The term “**human-centered design**” means an interdisciplinary methodology of putting people, including those who will use or be impacted by what one creates, at the center of any process to solve challenging problems.
- (g) The term “**service delivery**” means actions by the Federal Government related to providing a benefit or service to a customer of a Federal Government entity. Such actions pertain to all points of the Government-to-customer delivery process, including when a customer applies for a benefit or loan, receives a service such as health care or small business counseling, requests a document such as a passport or Social Security card, files taxes or declares goods, uses resources such as a park or historical site, or seeks information such as notices about public health or consumer protection.

More: <https://www.performance.gov/cx/hcd/>

# More new lingo for Government

## Occasion

**(the why)** A customer\* situation and goal. Can be written as a story describing their intent or a life event. Include information on the scale of the demand or impact of the problem and characteristics of the person.

\* = 'customers' can be individuals or companies seeking to be served by your agency

## High-Impact Service

**(verb)** the process a customer goes through - and the sum of the help provided by an agency and its partners throughout - to obtain or make use of the offering.

*The service is made up of...*

## Offering or Objective

**(noun)** Product, good, or value received / task completed, e.g., passport, flu shot, loan, tax payment, progress through a border checkpoint

### Channels

**(places)** Where to access or interact with the service, e.g., communication letters, websites, contact centers

### Roles + Operations

**(people)** Tasks to perform and who does do them, e.g., concierge, county office employee, auditor, chat bot

### Tools + Technologies

**(things)** Foundational building blocks for delivering services, e.g., systems, tools, physical capital

More: <https://www.performance.gov/cx/assets/files/Federal-Service-Worksheet.pptx>

# Federal “Service Delivery”

Occasion	Offering	Service	Service Type
<i>April 15</i>	Tax Payment	Individual Online filing	<b>Compliance:</b> Completing required actions such as filing taxes, submitting information for or engaging with an auditor, environmental reporting, or completing a survey mandated by law
<i>I'm traveling internationally</i>	Passport	Passport Application / Renewal	<b>Administrative:</b> Requesting or renewing items that do not require an extensive eligibility determination or multi-stage review processes such as getting a license, passport, or social security card.
<i>I'm taking over my grandparents' farm</i>	Access to Financing	Microloan Program	<b>Benefits:</b> Applying for or progressing through more complex government processes to determine eligibility and degree of benefit such as immigration, Medicare, Veterans' Health services, or a small business loan.
<i>I want to take my kids on a vacation</i>	Parks Pass	Vacation Planner (recreation.gov)	<b>Recreation:</b> Utilizing a public space such as national parks, historical sites, or visiting museums
<i>I had a child</i>	Vaccine Recommendations	CDC Vaccine Schedule App	<b>Informational:</b> Providing authoritative knowledge-based resources to the public such as designing labels, releasing warnings, requiring disclosures, or providing health recommendations.
<i>I'm planning my company's growth strategy</i>	American Housing Survey Data	Census Data Release	<b>Data and Research:</b> Conducting or funding research, maintaining and preserving artifacts, collecting, analyzing, reporting, and sharing data
<i>I have unexplained fees on my credit card statement</i>	Legal recourse	Financial product complaint reporting	<b>Regulatory:</b> Providing clear guidance to support commerce, transportation, employment rules, workplace safety, public safety (e.g., ensuring clean water, safe medicines); enabling reporting of grievances (e.g., consumer protection)

# Additional Links

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- Life Experience Project Announcement: <https://www.whitehouse.gov/omb/briefing-room/2023/03/03/fact-sheet-biden-harris-administration-launches-nine-life-experience-projects-to-streamline-service-delivery-for-the-american-people/>
- American Rescue Plan Guidance: <https://www.whitehouse.gov/wp-content/uploads/2021/04/M-21-24.pdf>
- OMB M-22-10, Improving Access to Public Benefits Through the Paperwork Reduction Act: <https://www.whitehouse.gov/wp-content/uploads/2022/04/M-22-10.pdf>
- Strategies for Reducing Administrative Burden in Public Benefit and Service Programs: <https://www.whitehouse.gov/omb/information-regulatory-affairs/federal-collection-information/>