



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 13th, 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

- 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

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



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. Bronaugh, 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

Julie A. Su, Deputy Secretary
Department of Labor

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

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

An iterative approach to implementation

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
NEW Project: Piloting a benefits bundle approach for families navigating supports				
				In progress. HRSA/Healthy Start Pilot sites:
NEW Project: Piloting text message notifications for critical updates				
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 checked="" type="checkbox"/>	FY23 Q2	HHS Office of the Assistant Secretary for Public Affairs (ASPA), GSA Technology Transformation Services (TTS)	Established and developed agencies' authorities to send text messages for critical updates such as deadlines and program information
	<input type="checkbox"/>	FY23 Q3	HHS (ASPA), HHS Administration for Children and Families (ACF), GSA (TTS)	Partner with up to three benefits programs to send the first pilot messages via the notification service
	<input type="checkbox"/>	FY23 Q4	HHS (ASPA), GSA (TTS)	Assess the success of the pilots and provide a deliverable of lessons learned
Demonstrate the benefits bundle proof of concept and build the foundation for impact evaluations	<input type="checkbox"/>	FY23 Q4	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="checkbox"/>	FY23 Q4		
Build a model for future federal approaches to benefits bundle supports	<input type="checkbox"/>	FY23 Q4		
Facing a Financial Shock				
NEW Project: Improve federal data services for benefits delivery				
NEW Project: Piloting a newborn supply kit at the time of birth				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
Announce pilot partners and jurisdictions	<input type="checkbox"/>	FY23 Q2	HHS (CMS)	In progress. HHS has evaluated possible data sharing scenarios and use cases which are permissible under the Fair Credit Reporting Act (FCRA).
Build the newborn supply kit prototype and launch it in three jurisdictions	<input type="checkbox"/>	FY23 Q3	HHS (CMS)	In progress. The project team convened a summit with 30 state leaders in health and human services, and has identified priority state needs.
Conduct an implementation evaluation, including case studies and best practices	<input type="checkbox"/>	FY23 Q4	HHS (CMS)	Test a prototype to offer multiple income verification data sources to agencies and states
NEW Project: Piloting text message notifications for critical updates				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="checkbox"/>	FY23 Q4	HHS (CMS)	Propose improved guidance on permissible reuse of income data across programs, including a proof of concept to improve income verifications

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

 <p>Department of Agriculture</p> <ul style="list-style-type: none"> 1 Farm Services Agency 2 Forest Service 3 Food and Nutrition Service 4 Natural Resource Conservation Service 5 Rural Development 	 <p>Department of Health and Human Services</p> <ul style="list-style-type: none"> 10 Centers for Medicaid and Medicare Services 	 <p>Agency for International Development</p> <ul style="list-style-type: none"> 20 Agency for International Development 	 <p>Social Security Administration</p> <ul style="list-style-type: none"> 28 Social Security Administration 	 <p>Department of Veterans Affairs</p> <ul style="list-style-type: none"> 33 Veterans Benefits Administration 34 Veterans Health Administration
 <p>Department of Commerce</p> <ul style="list-style-type: none"> 6 Census 7 United States Patents and Trademarks Office 	 <p>Department of Homeland Security</p> <ul style="list-style-type: none"> 11 Citizenship and Immigration Services 12 Customs and Border Protection 13 Federal Emergency Management Agency 14 Transportation Security Administration 	 <p>Department of Labor</p> <ul style="list-style-type: none"> 21 Employment and Training Administration 22 Employee Benefits Security Administration 23 Occupational Safety and Health Administration 24 Office of Workers' Compensation Programs 	 <p>Department of State</p> <ul style="list-style-type: none"> 29 Passport Services 	 <p>Cross-Agency Coordination</p> <ul style="list-style-type: none"> 35 Recreation.gov
 <p>Department of Education</p> <ul style="list-style-type: none"> 8 Federal Student Aid 	 <p>Department of Housing & Urban Development</p> <ul style="list-style-type: none"> 15 Housing and Urban Development 	 <p>Office of Personnel Management</p> <ul style="list-style-type: none"> 25 Federal Employment Services 26 Retirement Services 	 <p>Department of Transportation</p> <ul style="list-style-type: none"> 30 Build America Bureau 	<p>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.</p>
 <p>General Services Administration</p> <ul style="list-style-type: none"> 9 USA.gov 	 <p>Department of the Interior</p> <ul style="list-style-type: none"> 16 Bureau of Indian Affairs 17 Bureau of Trust Fund Administration 18 Fish and Wildlife Service 19 National Park Service 	 <p>Small Business Administration</p> <ul style="list-style-type: none"> 27 Small Business Administration 	 <p>Department of the Treasury</p> <ul style="list-style-type: none"> 31 Treasury Department 32 Internal Revenue Service 	<p>https://performance.gov/cx/</p> <p>US BY THE PEOPLE FOR THE PEOPLE WITH THE PEOPLE</p>

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/>

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

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.

OMB Circular A-11 Section 280

SECTION 280—MANAGING CUSTOMER EXPERIENCE AND IMPROVING SERVICE DELIVERY

SECTION 280 – MANAGING CUSTOMER EXPERIENCE AND IMPROVING SERVICE DELIVERY

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280.2	Who is a Federal Government customer?
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280.4	What is Federal Government service delivery?
280.5	What is the purpose of implementing this guidance?
280.6	How should agencies manage customer experience?
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280.8	How should customer experience be reflected in the agency's Annual Performance Plan?
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280.10	What additional steps should HISPs take to manage customer experience?
280.11	What shall the data dashboards submitted to OMB include?
280.12	When are the data dashboards due?
280.13	What shall HISP CX Action Plans include?

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

What drives each of our HISP service experiences?

Trust and Experience Drivers	Driver Sub-Categories
Service Performance + Reliability + Consistency	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.
	Transparency I was treated fairly / I understand what was being asked of me throughout the process.
	Employee Interaction / Warmth / Helpfulness / Competence Employees I interacted with were helpful. / The Call Center Representative was committed to solving my problem.
Equity	
Humanity	



How are we sharing HISP Feedback Data?

1

KEY QUESTION

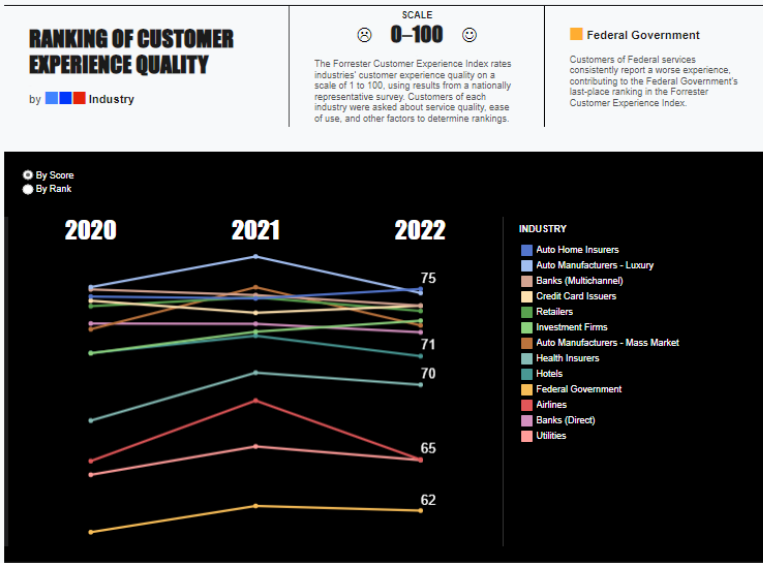
How does the quality of customer experience provided by the Federal Government compare to that of other industries?

Details %

BOTTOM LINE UP FRONT

Over the past year, the Forrester CX Index for most industries decreased, while the CX Index for the Federal Government stayed the same in a statistically significant way. Within these rankings, some agencies performed above the average for the Federal Government, including: the National Parks Service, the Bureau of Consular Affairs, Tricare, Medicare, Medicaid, and the US Postal Service.

Target outcome
Move from last into top 10 of Forrester industry customer experience ranking



Data current as of FY23 Q2

Target outcome

Achieve 75 percent or higher post-transaction trust in High Impact Service Providers

MEASURING TRUST AND CONFIDENCE

in High Impact Services Providers after individual service transactions

RATING SCALE
1-5

OMB Circular A-11 Section 280 requires High Impact Service Providers (HISPs) to gather feedback from customers after they have completed a transaction. Customers are asked to rate aspects of their experience on a 5-point scale, where 1 represents a very negative rating; 3 represents a neutral rating; and 5 represents a very positive rating.

% POSITIVE
0-100

% positive refers to the proportion of sampled customers who provided a rating of 4 or 5 when asked about their trust or confidence after completing a transaction. Providers were instructed to adapt the following prompts when asking customers to rate trust or confidence:

- This interaction increased my trust in [Program/Service name].
- I trust [Agency/Program/Service name] to fulfill our country's commitment to [relevant population].

% POSITIVE BY SERVICE PROVIDER

% POSITIVE BY TRANSACTION POINT

NOTES

% of customers who gave a positive rating when asked about trust or confidence

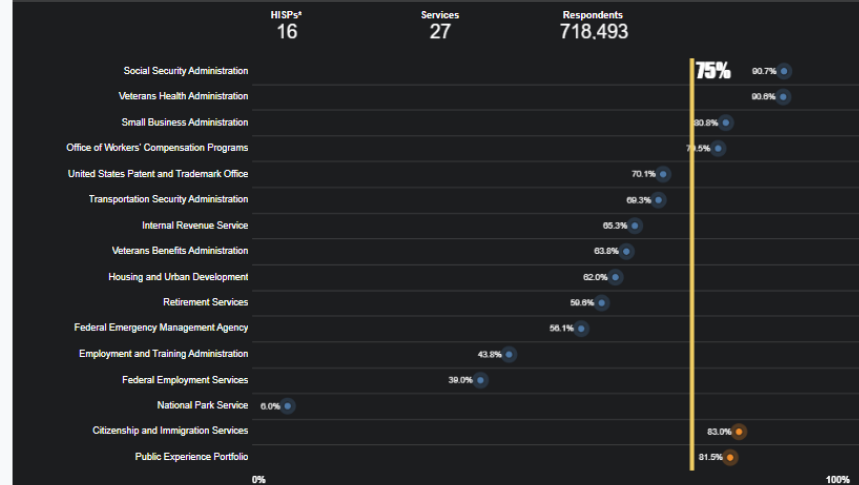
- 75% positive target
- At least one survey by this provider meets 90% or more of the criteria for data confidence
- All surveys by this provider fall short of meeting at least 60% of the criteria for data confidence

Filter by Survey Type

- Asking about trust OR confidence
- Asking about trust
- Asking about confidence

Quarter

2



* OSHA, Rural Development, BITFA, and Fish and Wildlife Service submitted post-transaction feedback survey data but they did not achieve a significant volume of response. Other HISPs such as CMS, FSA, and Passport Services reported data but did not ask a Trust or Confidence question.

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

Other Findings: Mobile web or apps outperformed desktop web in every instance.

Data on 9 call center services.

AGENCY	HSP	CHANNEL	UNIVERSE	OFFERED	RESPONSES	SATISFIED	TRUST	EFFECTIVE	EASY	EFFICIENT	EQUITY	EMPLOYEE
OPM	USAJOBS	Mobile *	13,116,846	4,939	1,775	4.28	4.14	4.11	4.14	4.04	4.40	4.24
		Desktop *	16,235,775	6,774,659	95,781	3.85	3.75	3.68	3.68	3.69	4.02	3.78
* after 3 pages												
Education	Federal Student Aid	App	83,000	83,000	2,200	4.59	4.73	4.36	4.58	4.53	4.49	4.41
		Web	6,400,000	185,000	2,600	4.36	4.65	4.21	4.40	4.16	4.23	4.41

The FSA app only accounts for 1% of users but has higher scores across the board, especially efficiency.

Some might conclude they should try to push users to the app. Instead, we would advocate for making the web experience more app-like, a progressive web app (PWA), and sunset the native app(s).

AGENCY	HSP	SERVICE	CHANNEL	RESPONSES	RATE	SATISFIED	TRUST	EFFECTIVE	EASY	EFFICIENT	EQUITY	EMPLOYEE
CMS	Medicare	Support	IVR	327,877	7.25%	4.57		4.54	4.65	4.10		4.68
CMS	Exchange Marketplace	Support	IVR	214,601	5.08%	4.54						4.59
State	Passport Services	Pending Application	IVR	2,988	4.27%	4.50	4.45	4.50	4.40			4.55
Commerce	USPTO	Trademark Application	Emailed	1,384	60.89%	4.48	4.52	4.34	4.52	4.34	4.63	4.51
DHS	FEMA	Individual Assistance	IVR	3,614	28.57%	4.46	3.68	4.10	4.26	4.42	4.51	4.16
Commerce	USPTO	Patent Application	Emailed	998	6.64%	4.40	4.46	4.46	4.42	4.22	4.73	4.55
Treasury	Internal Revenue Service	Support	IVR	3,822	5.99%	4.20	4.17	4.20	4.20	3.97	4.47	4.33
VA	Benefits (VBA)	Support	Emailed	6,934	7.89%	4.03	3.86	4.17	4.27	3.74	3.96	4.51
DHS	Citizenship & Immigration	Undefined	IVR	1,800	22.06%	3.81	3.94	3.73	3.65	3.49	4.09	3.99
						4.26	4.06	4.19	4.21	3.98	4.33	4.37
					weighted	4.50	4.50	4.52	4.62	4.06	4.37	4.63

Data on 11 web services.

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)

Surveying at multiple points along the journey can identify areas of opportunity.

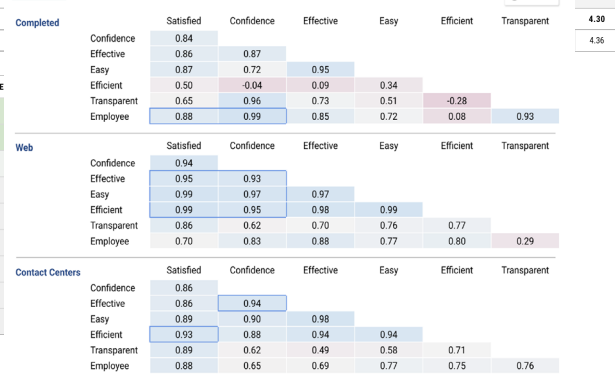
AGENCY	HSP	SERVICE	CHANNEL	RESPONSES	RATE	SATISFIED	TRUST	EFFECTIVE	EASY	EFFICIENT	EQUITY	EMPLOYEE
DHS	FEMA	Individual Assistance Program	IVR									
		- After Contacting FEMA Helpline or Online		1,526	40.03%	4.50	3.92	4.35	4.47	4.64	4.47	
		- After Registering with FEMA Rep or Online		975	33.76%	4.75	4.48	4.42	4.53	4.82		
		- After Receiving Assistance		1,113	18.71%	4.12	3.68	3.90	4.00	4.27	4.05	3.86
State	Passport Services	Information and forms *	Web	2,804	3.26%	4.48	4.48	4.15	4.35			
		Pending Applications *	IVR	2,988	4.27%	4.50	4.45	4.50	4.40			4.55
		After passport received *	Emailed	1,063	3.42%	4.40	4.40	4.35	4.35	3.80	4.50	4.55
* ACSJ data converted to 5-pt scale												

More detailed look into variance between Call Center and Web (1 of 3)

AGENCY	HSP	SERVICE	CHANNEL	RESPONSES	RATE	SATISFIED	TRUST	EFFECTIVE	EASY	EFFICIENT	EQUITY	EMPLOYEE
Commerce	USPTO	Trademark	Call Center	1,384	60.89%	4.48	4.52	4.34	4.52	4.34	4.63	4.51
		Patent	Call Center	998	6.64%	4.40	4.46	4.46	4.42	4.22	4.73	4.55
		Trademark	Office Action	811	45.26%	3.38	3.43				3.72	4.21
		Trademark	Web, Mobile	192	0.03%	3.93	4.00	3.84	3.63	3.76		
		Patent	Web, Mobile	150	0.09%	3.74	3.89	3.59	3.43	3.66		
		Trademark	Web, Desktop	5,629	0.48%	3.84	3.75	3.80	3.60	3.67		
		Patent	Web, Desktop	818	0.05%	3.57	3.43	3.43	3.22	3.34		
		Trademarks	Web, Registered	297	NA	3.17	3.18	3.22	2.91	2.95		
		Patents	Web, Registered	391	0.02%	2.78	2.86	3.03	2.80	2.77		

AGENCY	HSP	SERVICE	CHANNEL	RESPONSES	RATE	SATISFIED	TRUST	EFFECTIVE	EASY	EFFICIENT	EQUITY	EMPLOYEE
OPM	Retirement Services	Services Online	Web	23,922	3.73%	4.51	4.36	4.47	4.43	4.33	4.61	4.47
State	Passport Services	Information and Forms	Web	2,804	3.26%	4.48	4.48	4.15	4.35			
Education	Federal Student Aid	FAFSA Submission	Web + App	4,800	1.79%	4.47	4.69	4.28	4.49	4.34	4.36	4.41
SSA	Online Services	Undefined / All	Web (Foresee)	95,781	1.41%	4.40	4.19	4.34	4.33	4.24		
OPM	USAJOBS	Job Seeker Portal	Web	8,679	48.46%	4.07	3.95	3.90	3.91	3.87	4.21	4.01
CMS	Exchange Marketplace	Support, Web	Web	16,535	0.96%	3.98	3.89		3.70			
Commerce	USPTO	Trademark Application	Web	5,821	0.33%	3.88	3.87	3.82	3.61	3.71		
Treasury	Internal Revenue Service	IRS.gov	Web	28,816	0.46%	3.80	3.30	3.55	3.40	3.30		
Commerce	USPTO	Patent Application	Web	1,220	0.06%	3.66	3.66	3.51	3.33	3.50		



Correlation (multivariate regression) Analysis







What's next?

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 <input type="checkbox"/>	 It was easy <input type="checkbox"/>	 Took the time I expected <input type="checkbox"/>	 Instructions were clear <input checked="" type="checkbox"/>
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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

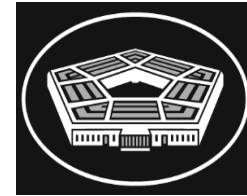
Develop and Implement Agency Equity Action Plans

Commitment 4

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



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?

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

“Advancing equity is not a one-year project. It’s a generational commitment.”
President Biden
April 14th, 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

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

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)

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

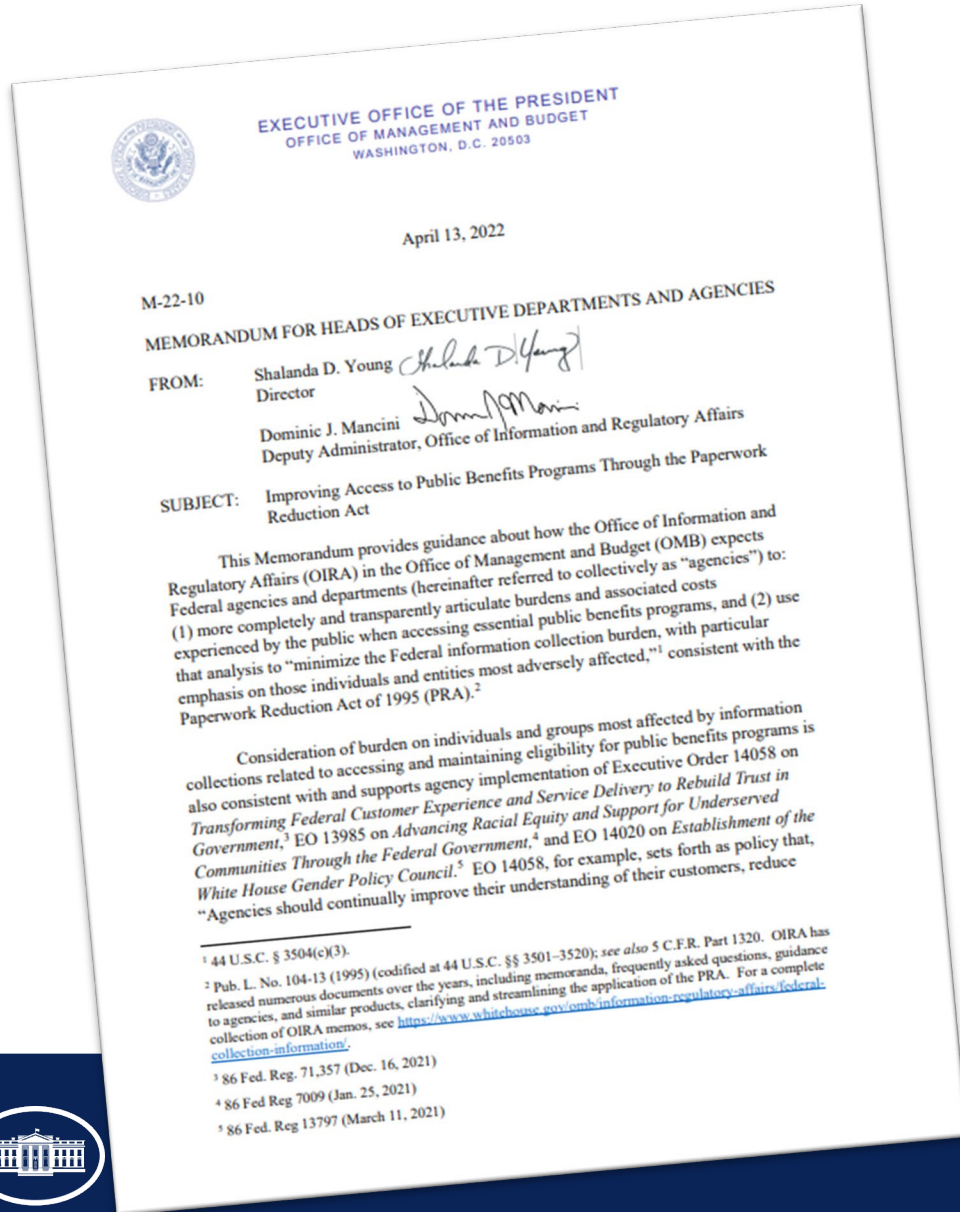
How the Federal Government is Reducing Burdens to Accessing Critical Benefits and Services



- Across social programs in the United States, many otherwise eligible individuals do not receive benefits.
- One important reason for low take-up rates is *administrative burden* – the barriers that individuals face in applying for, accessing, and using benefits.
- These burdens are also imposed on those who claim benefits, often at great personal cost for members of already-underserved communities.
- **The Office of Information and Regulatory Affairs (OIRA) is tackling these burdens and time taxes by changing forms, regulations, and more.**



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”?

- (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



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	Compliance: 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	Administrative: 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	Benefits: 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)	Recreation: 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	Informational: 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	Data and Research: 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	Regulatory: 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

- 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/>