THE FIELD GUIDE TO VETERANS SERVICE REPRESENTATIVE (VSR) TRAINING: A WEB BASED TRAINING CASE STUDY

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ABSTRACT

With budget and manpower cutbacks, trends toward case management, team focus, and customer service, it is common for two or more jobs to be combined into one consolidated job. Consolidated jobs require extensive cross-training for the additional tasks, which are often comprised of diverse knowledge, skills, and perspectives not associated with the previous, unconsolidated jobs. For instance, an organization may combine one customer interface-type job with an analysis-type job. This results in a considerable training challenge, as the knowledge and skills required are quite different. Often, the need for client service and immediate work activities continues through the reorganization, limiting training time. These needs are exacerbated when new employees are hired along with the requirement for cross-training of current employees. When this type of job merger occurs, there usually is not sufficient time for the structured analysis and design required for training development.

This situation arose in the Veterans Benefits Administration's need for Veterans Service Representative (VSR) training. There was an immediate need to cross train approximately 4,000 employees at 58 regional offices in the knowledge and skills required for the consolidated VSR job. Also, new employees were to be immediately hired. A short-term approach, using selected ISD principles was taken to support immediate training for the VSR while a structured ISD approach is being taken for the long-term. Web-based training was selected as the delivery medium for the short-term solution.

This paper will address the lessons learned in the development of the short-term approach: *The VSR Field Guide Web site*. Over 1,000 learning outcomes were identified and organized into a taxonomy, curriculum outline, lesson plans, and resource library. This approach allowed for rapid deployment of a solution for the VSR training problem. Initial reaction to the Field Guide has been positive. We believe that the development process and the "lessons learned" from this project can be beneficial to others in both government and commercial industries, whenever training analysis has to be streamlined to meet impending deadlines.

ABOUT THE AUTHORS

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BACKGROUND

The Problem

It is becoming commonplace in government for the responsibilities of two or more jobs to be combined into one consolidated job. Due to automation, recent downsizing and an increased emphasis on customer service, a new Veterans Service Representation (VSR) job was established. The VSR combined the two major job responsibilities of the Veterans Benefits Counselor (VBC) and Veterans Claims Examiner (VCE) positions, along with various clerical activities. The VBC provided information and guidance for veterans. The VBC had to have excellent communication and human relations skills to avoid misunderstandings and confrontational situations while working directly with individuals with diverse backgrounds and temperaments. The VCE position was a highly analytical job with minimal client interface. VCE duties required an extensive knowledge of medical issues, human body issues, laws and procedures which were pertinent in the evaluation of claims for veterans benefits. Figure 1 identifies the major job duties of the new VSR position with responsibilities consolidated from approximately nine jobs.

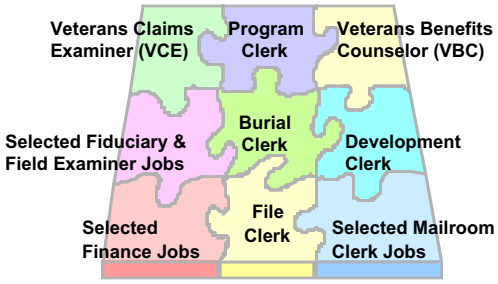


Figure 1: Major duties of VSR Position

The Challenge

The new VSR job resulted in a considerable training challenge since the knowledge and skills of the combined positions were quite different. In this case, the challenge was exacerbated by the following factors:

- A significant number of new employees at 58 regional offices had to be trained, as well as current employees who were skilled as a VBC or in other benefit jobs, i.e., insurance or loan guaranty.
- Veterans claims had to be serviced in a timely manner as continuing workload had to be considered. Time spent in training was seen as penalizing client service time, and efforts were made to keep time spent away from the job to a minimum.
- Current training practices combined classroom lectures with extensive on-the-job training. Training coordinators in each regional office had to create their own training materials and classroom curricula.
- Classroom training was supplemented by mentoring, which was generally time consuming and not standardized.
- Most regional office training practices assumed that it would take two years to adequately train a VSR.

All these factors contributed to a considerable amount of pressure when the training team was told they had three months to develop the technical training for a VBA recruitment initiative, the Opportunity 1999 Program.

There were significant procedural and organizational problems requiring a systematic approach to meet this new training need. The VSR training team was faced

with a lack of standardization in the work processes because of differences in the level and mix of work at each regional office. VBA management wanted to use the new training to standardize work processing and eliminate many of the problems stated above. In addition, detailed software applications and software tools were being introduced as part of the new VSR job. Adding to the complexity of the job were difficult and infrequent tasks, which were often performed incorrectly leading to "rework."

Previously, training given in Regional Offices was informal with most of the instruction taking place between a trainee and a mentor, the senior adjudicator. While this one-on-one method of instruction is invaluable, it does not guarantee that standard learning objectives are met. To compound this situation, trainees may be rotated between seniors as part of the normal employee rotation within the Service Center, leading to increased inconsistency of work processes. With this lack of uniform training comes a lack of uniform claims processing. Since the level of training given directly affects timeliness, productivity and quality within the Service Center, this situation was too complex to fix with a training program which had a three month ready for training date. Therefore, it was decided that an interim solution was needed, and that a long-term solution would follow.

SOLUTION

The overall strategy was to combine both a short-term and a long-term approach to address the entire problem. The short-term approach was to provide immediate aid for the instructor. The long-term approach was to provide an instructional system addressing all VSR job needs.

Short-term: *The Field Guide to VSR Training*

The development team's first inclination was to create an electronic "library of sorts" for all training materials that were currently available for the positions. That entailed taking all documented lesson plans, handouts, PowerPoint slide shows, etc., and storing them on a server that could be accessed through a "Training Materials Home Page." However, it was soon realized that the training coordinators and instructors in the field would require much more support than an electronic version of materials to which they already had access.

Rather than simply provide a one-stop location for training materials, the training team provided information on how to use the materials. *The Field Guide to VSR Training* was developed as a web-based, training job-aid and training materials repository for Instructors/Training Coordinators. *The Field Guide to VSR Training* was to be used to organize day-to-day instruction of new and current employees as well as for long range training plans. The intent was to develop a standardized curriculum, standardized training activities and reduced instructor preparation time, and as a first step towards the standardization of work procedures. *The Field Guide to VSR Training provides:*

- The VSR Job Model
- The VSR Learning Matrix
- A Course Map for the New-Hire VSR
- A detailed Syllabus
- Training Package and Lesson Plans for the VSR Position
- Training Materials for computer applications used on the job
- Links to reference materials, such as manuals and regulations

The *Field Guide* was implemented on the VBA Intranet to promote accessibility and maintain security. Given the various time zones and independent training schedules at each of the regional offices, it made sense to provide this access on demand. Web delivery met these requirements.

Long-term: A Structured ISD Approach

It was evident that a structured instructional systems development program was needed to change both infrastructure and performance problems. A thorough Job Analysis and Task Analysis with work flow diagrams was necessary to define standard job procedures. The training team knew that a systematic and structured process was necessary to ensure that gaps in performance and training practices could be remedied. There were obvious needs for the development of performance objectives, appropriate training strategies, job aids, criterion referenced performance evaluation, effective formative and summative evaluation, and life cycle revisions and updating. Currently such a program is underway.

However, it was hoped that the short-term products could be used as a framework for the job and task

analysis. It is probable that the current VSR Job Model will be slightly modified by the job analysis. But it was hoped that the work flow diagrams would naturally fit under the categories of the VSR model, and that the Learning Matrix, Course Maps, and detailed Syllabi would retain their existing formats. Table 1 indicates our concept for short-term and long-term products. The following sections in this paper address the approach used to develop our short-term products.

ISD Products	Short Term Approach	Long Term Approach
Planning		
Plan of Action & Milestones	X	
Training Program Development & Management Plan		X
Analysis		
Comparative Analysis	X	
Needs Analysis Brainstorming Sessions	X	
Needs Analysis/Training Situation Analysis		X
Learning Analysis Report		X
Job Analysis		X
Task Analysis/Flow Diagrams		X
Content Analysis		X
Design		
Instructional Media Design Report		X
Learning Outcomes	X	
Performance Objectives		X
Curriculum Outline/Learning Matrix	X	
Lesson Specification		X
Course Map & Syllabus	X	
Development		
Job Aids	X	X
Electronic Performance Support System		X
Instructional Materials		X
Instructor Guides		X
User/Lesson Guides	X	X
Tests		X
Lessons via various media		X
Implementation		
Training System Implementation Plan		X
Train-The-Trainer Training	X	X
Evaluation		
Evaluation Study	X	
Training Evaluation and Validation Report		X

Table 1. VSR Short Term and Long Term Products

ANALYSIS, DESIGN & DEVELOPMENT

Methodology

The training team had to quickly develop products for VSR training. Since a systematic ISD based training program could take a year or more to develop, the team decided to adopt a quick needs analysis. The quick analysis formed a training task list based on the opinions of experts. (A full job and task analysis is based upon observation and debriefing actual job performers. Job and task analysis will reveal more tasks and subtasks, and will capture information on such items as cues, problems, and cognitive process.) The intent of the training team was to develop a curriculum guide and job aids as quickly as possible as an interim solution. The team's intent was to customize the ISD process to meet the team's product deadline with the understanding that the long-term approach would take a thorough structured analytical approach. The team customized the stages of Dick & Carey s model (1978) presented in Figure 2 to fit the team's schedule and needs. The following activities were completed:

Identify Instructional Goals. A group of VBA instructors, SMEs, and instructional designers conducted a quick needs analysis. Short-term requirements were to develop products for new hire and cross training, for formal instruction at each of the 58 regional offices, and for informal OJT where possible. Other needs were to promote standardization, to reduce instructor preparation time, and to utilize existing training materials where possible. Outputs of the needs analysis were a formal statement of work for the project team and a plan of action and milestones.

Conduct Instructional Analysis. There was no time for job or task analysis. So a comparative analysis of all the past job analyses was conducted. The analysis resulted in the interim VSR Job Model. The model defines the boundaries of the new VSR job with a preliminary identification of job and task categories with associated knowledge, skills, and attitudes (KSAs).

Identify Entry Behaviors and Learner Characteristics. Next entry behaviors and learning characteristics had to be estimated based on both information on past hires and predictions on the demographic characteristics of the new hires. An important assumption made was that all students would at least have some familiarization with the use of computers. The VSR program would not train students how to use computers. It would have been helpful to have more data on student characteristics given the mix of knowledge, skills, and attitudes required.

Write Performance Objectives. Over 1000 learning outcomes (versus performance objectives with conditions and standards) had to be organized, combined, and rewritten. The learning outcomes were classified in domains based on *Gagne s Taxonomy for Cognitive Learning and Krawthwol s Taxonomy for Affective Learning.* Existing learning outcomes from past training programs tended to ignore learning levels (e.g., subdomains.) The problem encountered was that the past training analysis identified knowledge and performance level outcomes only. There were no other learning levels identified to guide the training. So new learning outcomes were developed for all appropriate subdomains or learning levels. Templates of action verbs based on Gagne s and Krawthwol s Taxonomies were developed as a job aid for the development of outcomes for all appropriate learning levels.

Develop Criterion Referenced Test Items. New criterion referenced test items were not developed. New performance objectives and criterion referenced test items will be developed in the follow-on training analysis. The short-term approach relies on existing training materials and test items.

Develop Instructional Strategy. No new instructional strategies were developed. However, successful past training strategies were incorporated in a learning matrix. The VSR learning matrix was developed as a curriculum guide for both the student and teacher. Teaching strategies are listed per topic. A Course Map and more detailed Course Syllabus were also developed.

Develop Instructional Materials. The Field Guide to VSR training was created as a web-based, training job aid. Current training materials were reviewed and revised as necessary before including them in the web site. The Learning Matrix was also created specifically for use by Training Coordinators and Instructors in the field. Training on how to use the Field Guide was provided to all trainers in the field via satellite broadcast. A user guide for web navigation was also provided.

Web Design and Development Considerations

In designing for the web, we had hardware, software and audience restrictions. The major limitations were:

- Limited bandwidth
- Americans with Disabilities Act (ADA) compliance requirements
- Microsoft Internet Explorer 4.0 - browser
- Microsoft Word 6.0
- An audience with
  - —limited or no access to the Intra/Internet due to restrictions placed on a local level
  - —limited trainin g/familiarity with Intranet and Internet use
  - — limited training time available
  - —limited or no pedagogical backgrounds for selection of appropriate training materials, methods and curriculum

Navigation would have to be simple as well as redundant. We chose the course numbering system of the Learning Matrix as the main navigation vehicle for finding both the topic and its related training materials.

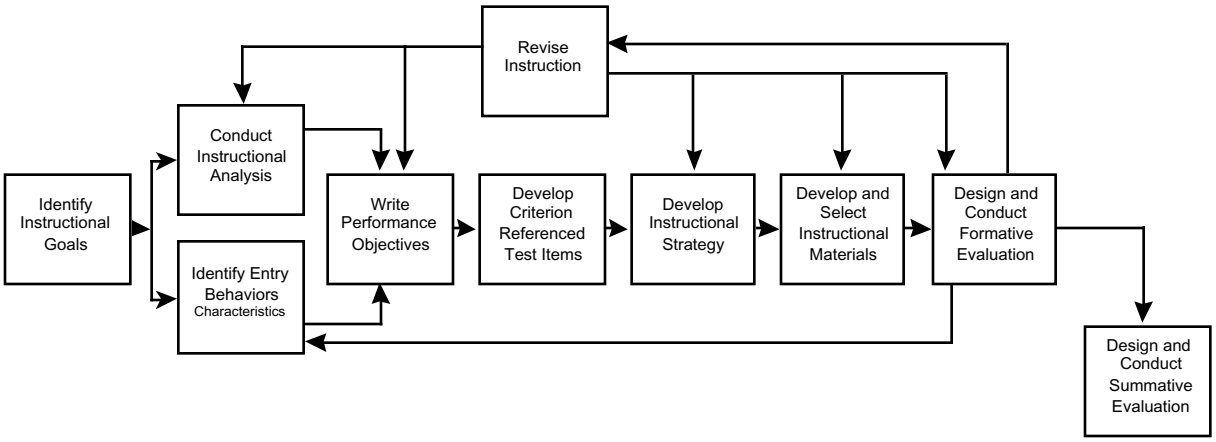


Figure 2: A Systems Approach Model for Designing Instruction (Dick & Carey, 1978, 1985, 1990)

By doing so, we expected to be reinforcing patterns of relating topics and materials on the user.

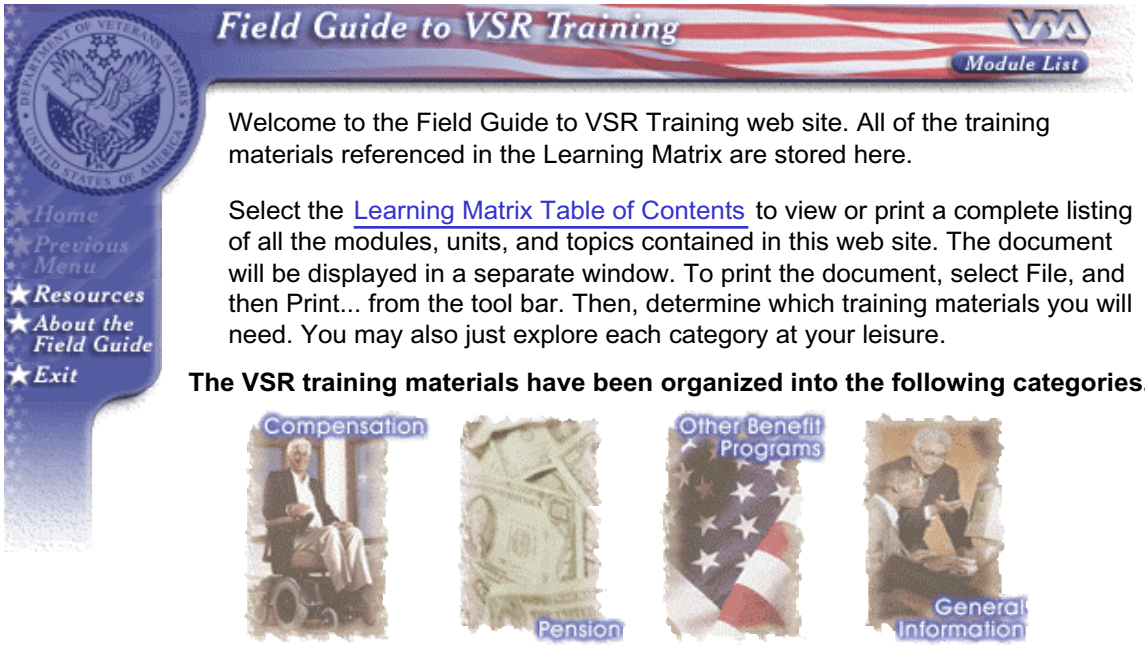
The training team grouped the 16 modules of the Learning Matrix into four general categories: Compensation, Pension, Other Benefit Programs, and General Information (See Figure 3). The team assigned each category a picture, using that picture consistently through the navigation as a visual reference. From these categories the team linked to the 16 modules, their units (114), and then topics (516). At the topic level, links were placed to the Word 6.0 document which is the basis of the Learning Matrix. Java Script boxes offered links to the lesson plan material for each topic. The team also offered a shorter navigation through the Learning Matrix s table of contents directly to any topic and through the Resources page to any lesson plan or student material. In addition to the four pictured categories, two buttons appear on every page. The *Resources* button links to the Resources page where all VSR training materials are stored (alphabetically by title). The *About the Field Guide* button opens an index to the user s guide to the Field Guide for VSR Training.

Products

The VSR Model

A major product of this endeavor was the VSR Model. The purpose of the model was to provide the instructor with some flexibility in administering the curriculum. The model was the result of the VSR comparative analysis and job modeling. A three axis model emerged that was dependent on the benefit (and other) programs to be taught, the categories within each program, and the skill strands that ran through each program. Fourteen of the Learning Matrix s modules are shown in Figure 4 as large dots. The remaining 2 of the 16 modules are shown in the center (Computer Systems and VA Overview). These remaining two modules were placed in the center since a VSR must be taught portions of these modules before progressing into any program or category study.

Figure 3. The *Home Page of the Field Guide to VSR Training*



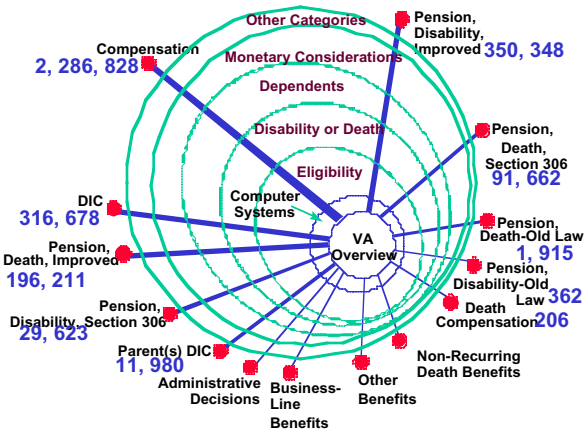


Figure 4. VSR Model

The strand connecting the program dots to the center of the model represents the interwoven skill strands consisting of: information sharing, research & application, notification, client s rights, and computer processing. The strands are shown in different weights to represent which programs require the most emphasis based on number of individuals receiving that benefit (data is from May 1999).

The numbers next to the categories (Compensation: 2,286,828 cases; Improved Pension: 350,358 cases, etc., reflect this weighting precisely.

The instructor is allowed to train by program (module) or by category. Categories are represented by the circles: eligibility, disability/death, dependents, monetary considerations and other. If the instructor chooses to train by program (module), the recommended course is from the center out as each category builds a logical progression of entitlement for a recipient.

If the instructor chooses to train by category, they will be comparing program rules within a category, i.e., the differences between dependent eligibility for disability compensation and disability pension.

Choices for the instructor to create individualized training plans was necessary based on the various mixes of work within any of the 58 offices. However, a recommended VSR Course Map is included in the user s guide.

The Learning Matrix

The Learning Matrix was designed to aid the unskilled or untrained instructor in determining not only the training objectives, but in research of references and resources, what should be trained, how long it will take and how to reach the desired goals. It can readily convert to the beginning page of a lesson plan, should the instructor have the skill or time to produce one. And when skill or time are missing, it readily substitutes where nothing existed before. (See Figure 5.)

Figure 5. Learning Matrix

120000 Non-Recurring Death Benefits Module

120300 Accrued Unit

120331 Monetary ConsiderationsTopic

STUDENT CENTERED				TEACHER CENTERED	
Topic + Learner Outcomes	**Reference**	**Product**	**Time**	**Teaching Points/Hints**	**Demonstrate Learning Exercise**
The student will: Æ List the regulations and manual citations regarding payment of benefits under checks not negotiated prior to death. Æ Indicate the time limit for filing a claim for checks not negotiated prior to death. Æ List the precedence of title to preferred beneficiaries. Æ Explain the procedures for claims of checks not negotiated prior to death, which cannot be distributed under payment based on relationship or reimbursement due to last illness or burial expense. Æ Prepare a memorandum statement for Finance to request submission of the claim to the General Accounting Office. Æ Process an award for accrued benefits via BDN 407 screen. Æ Process a denial of accrued benefits via BDN 407 screen.	**Reference:** 38 CFR /3.1003 M21-1 Æ Part IV, Chapter 27 Æ Part V, Chapter 8 **Resource:** VSR 2B	**The student will have an understanding of:** Æ Accrued benefits. Æ Relationship versus reimbursement. **The student will have the ability to:** Æ Develop for accrued information by letter, telephone or in-person. Æ Calculate the accrued amount. Æ Issue or deny a reimbursement for accrued benefits. Æ Issue or deny an accrued payment based on relationship. Æ Notify the claimant of the action and of their rights. **Course Codes:** 010451, 010461, 160461, 160911, 161001	**Class:** 4 hours **Practice:** 16 hours	**Review and Discuss:** Æ Payment of accrued benefits. Æ Checks not negotiated prior to death. Æ Time limit for filing a claim. Æ Denials. Æ Processing a grant. **What the student should know:** Æ Issues impacting monetary considerations. **What the student should do:** Æ Practice processing monetary considerations.	Give a Lecture & Demonstration followed by Guided Student Practice at Computer Terminals. Group students in two's or three's. Email Topic and Teaching Points to students a few days before the instruction. Suggest appropriate folders be selected and used for student training.

Five hundred and sixteen Topic Matrixes were created. Conversion of these Microsoft Word 6.0 documents to HTML pages has just begun. When complete, the instructor or student will be able to have every element required for that block of training, one mouse click away.

Formative Evaluation

During the development of the web site, formative evaluation was completed in a number of ways. Even though the short development timeframe (three months) limited the amount of formal evaluation that could be completed, experts were asked to provide input to the development process in the following ways:

- All lesson plans were reviewed for accuracy by field experts before being added to the web site. Over 40 lesson plans were scrutinized by more than 15 subject matter experts. This effort was completed with contractor support.
- The prototype of the learning matrix was viewed by more than 50 training coordinators, and focus groups were conducted to determine areas for improvement.
- The curriculum and jobs aids were reviewed by central office personnel and employees in the field.
- Comments were also received via the implementation broadcasts and through a web based feedback page.
- As soon as the web site became available on the Intranet, but before rollout, specific training coordinators in the field were asked to review and comment on the content, layout and design.

Since no new training materials were developed, no formal study reviewing student performance was conducted. This will be part of the follow-on structured ISD project.

IMPLEMENTATION

The web site itself was developed within a month using contracted support. The contracted support allowed for professional graphics development and interface and navigational design. Also, it provided more time for development and collection of materials, since the site managers for C&P Service were also on the team creating this project. The training team was able to use their expertise for the content of the web site, rather than tying them up with actual programming of the web site.

Because of the limited amount of web experience among training coordinators and instructors in the field, it quickly became apparent that some type of training on how to use the web site would be required. A train-the-trainer course was developed to meet that need. The course was delivered using the Veterans Benefits Network (VBN), which is a one-way video/two-way audio satellite delivery network already in use by VBA. The course was designed to take advantage of keypad technology to increase interactivity among participants.

The course was designed with two major objectives:

- Training coordinators and instructors would learn about the features of the web site and be able to navigate through the web site.
- Training coordinators and instructors would be able to use the information contained in the web site in planning and conducting the training of new and cross-trained VSR s.

The course was given over two days, with a day in between for after class activities. The course was conducted twice, live in the morning for offices in the east and central United States, and live in the afternoon for west coast offices. Homework assignments were given to allow the students to access the web site, practice navigation, and download materials. Follow-up on homework and continued instruction were given on the second day of class.

EVALUATION AND REVISION

Currently, the training team is conducting a summative evaluation of the use of the VSR Field Guide Web site in an effort to determine if the site meets the needs of the employees who are using it. The Web site will be revised as necessary to match the requests of the performers.

This evaluation targets training coordinators, instructors, students and supervisors. Evaluation issues include use of the web site, use of provided materials, training provided in use of the web site, effectiveness of the curriculum, course map, learning matrix and lesson plans, and what

changes need to be made to meet the needs of the training coordinators, instructors and students.

CONCLUSION

The advantage of using the short-term approach was that it was systematic, fast, and product centered. Our job aids are currently supporting both instructors and students. We were able to respond to an immediate need with a short-term solution without compromising results required via a long-term approach.

It seems that the VSR Model, Learning Matrix, and Course Map/Syllabus may only be enhanced versus replaced after the ensuing task analysis and training development is completed.

Lessons Learned

Lessons which might apply to government, military and other training environments include:

Negotiate with your client but be careful what you promise. With the demands associated with the incorporation of advanced technology in the workplace, we can expect more and more demands for immediate training products to support pressing problems. From our VSR experience, it is evident that compromises can be made for quick turn around products as long as it is clear that long-term performance solutions require systematic ISD projects.

Try to address as many phases of the ISD process as possible with your short-term approach. For instance, don t start without a needs analysis. It is important to sort out problems before a plan of attack is developed. If you get a diverse group together for a quick needs analysis, you can be clear on what can be accomplished in the short-term and what promises should not be made under pressure. Often the total problem can not be solved without infrastructure changes, and these generally are not achievable in the short-term. Without a needs analysis, such training situation issues can t be clarified.

The quick analysis was sufficient to identify major tasks and develop interim training. However, expert opinion alone does not provide information about the actual tasks and subtasks. It does not provide the cues that lead a case worker to take one direction as opposed to another. Nor does it provide information about problems and the step-by-step cognitive processes the case worker goes through to resolve the problems. For this level of detail you must conduct a job and task analysis on the job.

Don t underestimate the impact of short-term products. Quick turn around products (job models, curriculum outlines, course maps, syllabi, etc.,) can provide a unifying direction and stability for overburdened instructors. Users were very thankful for the job aids developed for this project.

Use the web for your training products but be sure to have some form of train-the-trainer training. The web based implementation provided products on demand to fit the unique training schedules of each of 58 regional offices. The approach is working well. However, the broadcasts were essential to explain the job aids, to clarify issues and to clear up misunderstandings.

A clear Plan of Action for the life of the project is critical. Each step of the project must be clearly defined, with resources indicated. Decision makers must be kept informed as the work progresses, since there is no time to change direction or products. All resources, whether they be subject matter experts, reviewers for formative evaluation, computer specialists with system requirements, designers and contractors, must be available as prescribed in the Plan of Action and Milestones. Coordination and communication, as well as anticipating obstacles is essential to the process.

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