

Evaluation Submission assignment

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Ron Charest, Meghan Cipperly, & Stephen Monroe

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Benefits Education for Transitioning Service Members

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Problem Statement

United States service members frequently transition out of service and into civilian life. When in this stage, they are called Transitioning Service Members (TSMs). During this time, they shift their concerns toward the future for themselves and their families. In order to receive benefits earned during their time of service, TSMs must apply for each specific benefit they desire. However, evidence suggests there are several problems that confound TSMs: the VA benefits system is dishearteningly complex; information about benefits (available benefits and specifics about each benefit) is overwhelming and confusing; and current efforts to educate TSMs about their benefits don't adequately prepare TSMs to confidently and successfully apply for benefits.

These factors result in stress, confusion, extra work, missed application deadlines, or inappropriately filing for benefits. The DoD and VA created a mandatory VA Transition Course to help them understand how to successfully transition out of the military and apply for benefits. However, issues persist despite this mandatory education.

To address these issues, we aim to improve the mandatory VA Benefits Course for TSMs.

Learner Analysis

Research Findings From Subject Matter Experts - Learner's Analysis

Our learners are transitioning service members (TSMs) of all ages, backgrounds, and ranks, and locations at military bases across the world (other attributes such as gender and ethnicity are considered irrelevant to this analysis). "TSM" is used interchangeably with "Learner" in this document. From SMEs, we know the following about our learners and the assumptions the current VA Benefits Course makes about these learners:

- **Entry Behaviors:** Basic reading and writing abilities; basic knowledge of how to follow processes and procedures; basic knowledge of general concepts including healthcare, retirement, medical insurance, and home ownership; basic ability to navigate the internet.
- **Prior Knowledge of the Topic Area:** Learners are not assumed to have prior knowledge of the topic area beyond the existence of concepts covered. Some learners may have only a shoddy understanding of some concepts, and other learners may have thoroughly explored concepts by attending college, purchasing a home, etc.
- **Attitudes Toward Content and Potential Delivery System:** Many learners believe the current delivery system (classroom style instruction) is fine. However, the content is viewed as overwhelming and not entirely relevant to each individual learner in the classroom.
- **Academic Motivation:** While some learners may be highly academically motivated, the course does not assume any great level of academic motivation. Learners are often motivated by the availability of benefits and their need to take advantage of these benefits.
- **Educational and Ability Levels:** The current course is built for low educational and ability levels. However, learners often struggle to cope with an overwhelming amount of information, and they struggle to understand complex VA processes.
- **General Learning Preferences:** From their time in the armed forces, learners will be familiar with the Department of Defense's course and classroom delivery styles.
- **Attitudes Toward Training Organization:** Some learners are not aware of the existence of the Transition Office before they begin the transition process. Attitudes of the organization are mixed depending on their personal experience with the Transition Office and the military in general.
- **Group Characteristics:** Learners can be broadly categorized into two categories: low-experience learners (who are often in a lower salary band and do not have as much life experience with managing their own healthcare or education, purchasing a home, etc.), and high-experience learners (who are often in a higher salary band and have more life experience with those concepts).

To learn more about TSM needs and their attitudes toward the current VA Benefits Course, we conducted one survey with TSMs (n=10) and one round of interviews with TSMs (n=5). We also conducted one round of interviews with current VA Benefits Course instructors (SMEs; n=2). See each section below (TSMs and SMEs) for more information about our research efforts.

Research Findings from TSMs - Existing Course Issues

We [surveyed TSMs](#) (n=10; mix of ranks and number of years of service) to better quantify their feelings about the mandatory VA Benefits Course. We conducted in-person interviews with TSMs (n=5; a mix of ages and ranks) to gather qualitative information about their feelings of the current course.

Information Category	Data Sources	Learner Characteristics
TSM attitudes of course usefulness	Survey; Interviews	<p>Most surveyed TSMs (80%) were neutral toward the course, or felt that it was some degree of not useful.</p> <p>Interviewed TSMs echoed this sentiment, saying that they felt underprepared to pursue benefits and navigate the complicated benefits space. Interviewed TSMs reported a mix of issues: problems getting their required documents to the right place; issues feeling prepared to file for benefits; and issues navigating the complex benefits space (seeking information and applying for benefits). Interviewed TSMs who did feel prepared reported that they had access to information and support through friends or support groups.</p>
Benefits confusion after course	Surveys; Interviews	<p>100% of surveyed TSMs were moderately or extremely confused about their benefits after the course.</p> <p>Interviewed TSMs reported feeling overwhelmed and underprepared.</p>
Benefits Missed	Survey; Interviews	<p>20% of surveyed TSMs reported missing out on benefits, and 80% reported not being sure if they had missed out on benefits.</p> <p>Some interviewed TSMs said they had missed benefits.</p>
Time spent researching benefits	Survey	<p>50% of surveyed TSMs reported spending more than 10 hours outside of the course researching their benefits. 30% reported spending between 4 and 10 hours researching outside of the course.</p>
Satisfaction with course elements	Survey	<p>At least 60% of surveyed TSMs felt somewhat or highly dissatisfied with: education on available benefits and qualification criteria; education on the processes for filing for benefits; help available during the course for filing for benefits; help pursuing filing processes to completion; course engagement; learning technology used in the course; and the length of the course (most believed it was <i>too short</i>).</p> <p>Some course elements produced less severe dissatisfaction: At least 40% of TSMs surveyed felt somewhat or highly dissatisfied with: the amount of work required outside the course (though TSMs spent much time researching benefits, they were not dissatisfied with this); and the resources offered as part of the course.</p>

Importance of Improvement	Survey	At least 80% of TSMs reported that it was Moderately Important or more important to improve all of the course elements listed above (in the previous row)
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Task Analysis: VA Transition Course

Summary

We conducted a Task Analysis to analyze the instruction currently offered by the VA Benefits Course. This Task Analysis was conducted to create a list of essential topics, and to spot specific areas of improvement in the current VA Benefits Course.

- **Subject:** The 6-hour VA Benefits Course created by the VA and DoD
- **Analysis Method:** Primarily Topic Analysis, with some elements of Procedural Analysis and Cognitive Analysis for relevant sections.
 - The highest-priority information focuses on communicating facts about benefits and application processes, a task well-suited to Topic Analysis.
- **Data Collection Method:** Generative, iterative design activity conducted online (Google Docs) with one Subject Matter Expert (SME) over several days. The SME constructed a bullet point list of topics required for the course, and then was interviewed by project members to refine the list. After the interview, the SME further refined the list. This cycle repeated 3 times for 3 hours' total interview time. Results of this activity were confirmed with 2 other SMEs. SMEs contributed knowledge from professional experience teaching the VA Benefits Course, and from referencing existing VA Benefits Course materials including lesson plans and PowerPoint decks.
- **Essential Facts & Concepts:** TSMs must understand *facts* about benefits to understand the benefits and how they can be gotten, and understand *cognitive procedures* to help parse timelines and overlapping areas of eligibility. First and foremost, the current course must educate Transitioning Service Members (TSMs) about their benefits, eligibility criteria for each benefit, mandatory timelines/deadlines for each benefit that must be observed, and required personal documents and paperwork that the application for a specific benefit will require (and that they should seek some of these documents ASAP, as they can take time to acquire). Additionally, TSMs must understand that nobody else can or will apply for benefits on their behalf.
- **Essential Attitudes and Dispositions:** To facilitate the pursuit of VA benefits, TSMs should adopt *attitudes* that will facilitate useful behaviors for pursuing benefits, and develop *cognitive skills* that will help them discern credible sources of benefits information about benefits. Useful attitudes and dispositions include: alertness and readiness to learn and take notes while attending the course; optimism and confidence that benefits can be understood and that benefits system can be successfully navigated; care for precision and attention to detail when gathering necessary information and applying for benefits; and a sense of ownership that they alone are ultimately responsible for pursuing their desired benefits and checking on the status of their benefits.
- **Themes:** To smoothly navigate the complex world of benefits, veterans must: *understand their role* in applying for and receiving benefits; understand that *preparation* will help them take action on benefits; learn how to *identify credible sources* of benefits information; *understand facts about each specific benefit*; and understand *how to apply* for benefits they desire.

NOTE: This task analysis is presented as a series of sections. Each section features a number of core concepts. Individual components in the task analysis are grouped under these various concepts. These concepts are prioritized according to their importance in the *current* curriculum.

Task Analysis: Understanding Benefits

Benefits are at the core of the mandatory VA Benefits Course. Currently, conveying facts about benefits is considered the highest priority of the course. TSMs must broadly understand the benefits, identify whether or not they desire the benefit, understand whether they are eligible for the benefit, and understand how to apply for the benefit.

CONCEPT: Disability and related benefits [Facts, Procedures]

ATTITUDES/DISPOSITIONS: Confidence that the course will teach them about all benefits they can apply for; confidence that they can understand benefits and applications processes; a sense of ownership to seek out documents necessary for their applications; care for precision and attention to detail when gathering necessary information and applying for benefits.

Current Priority: HIGH

- I. Disability definition
- II. Disability Rating
 - A. Definitions: what is a disability rating
- III. The establishing qualities of a VA recognized Disability
 - A. Direct
 1. Examples of conditions included
 - B. Aggravated
 1. Examples of conditions included
 - C. Presumptive
 1. Examples of conditions included
 2. Update on status of “burn pit Registry”
 3. Exploration of VA website on where to research conditions
 - D. Secondary
 1. Examples of conditions included
- IV. Payment Scales and rating information
 - A. 10-100 scales
 - B. Explanation of “overall” rating vs. Individual rating
 - C. Additional compensation at the 30% plus level
- V. What TSMs need in order to file a claim
 - A. Medical Records
 1. Dental health records
 2. Mental health records
 - B. Self File options
 1. Exploration of online application form located on “ebenefits
 2. Screenshots and information needed
 - C. VSO -Veteran Service Organizations
 1. Explanation of qualifying organizations, where to find them
 - a) Website navigation of searchable list from “e benefits” website
- VI. Claims process options

- A. BDD-Benefits Delivery at Discharge-
 - 1. 180 to 90 days TIMELINE
 - B. Fully Developed claims and Traditional claims
 - 1. 90 days remaining and unlimited time to file
 - C. Filing date explanation and backdated claims explanation
- VII. Next steps and process
- A. 8 phases of VA process
 - B. Compensation and Pension (C&P) exams
 - C. Decision in mail and next steps explanation
- VIII. Troubleshoot: conflict with Retirement pay explained (CRDP-Concurrent receipt of Retirement Pay) rating and payment tables
- A. 10-40 percent rating tax option
 - B. 50-100 percent rating pay option
 - C. Follow up contact and website exploration via DFAS (Defense finance and Accounting Service Site)
- IX. Additional Benefits (Ancillary Benefits) available for veterans rated with a service connected disability
- A. Home Modification
 - B. Vehicle Modifications
 - C. Service Animals

CONCEPT: Retirement, life insurance, and related benefits [Facts, Procedures]

ATTITUDES / DISPOSITIONS: Confidence that they can understand benefits and application processes; alertness and active participation by asking questions and taking notes; care for precision and attention to detail when gathering necessary information and applying for benefits.

Current Priority: LOW

- I. VA Life Insurance
 - A. Servicemembers Group Life Insurance (SGLI) that all members currently have---expiration at 120 Days.
 - 1. Explanation of continued coverage for 120 days after service for no further cost, no action necessary
 - B. Veterans Group Life Insurance (VGLI) --a replacement coverage for SGLI explained.
 - 1. Explore website application and web navigation on ebenefits
 - 2. Display costs chart for decision selection information
 - 3. Detail 1 year plus 120 day deadline to apply for VGLI
- II. VA Burial Benefits
 - A. Describe what is offered if VA cemetery burial is chosen
 - 1. Headstone, Personalized marker, medallion, headstone, burial flag, closing of casket and perpetual care
 - 2. Describe pre-need authorization and paperwork required
 - a) Eligibility requirements
 - b) Website exploration and use of VA cemetery locator tool
- III. VA Pension
 - A. Description of Pension payments and service member eligibility requirements

- B. Description of transfer options for family members
- C. Website navigation for help applying and needed documents and income tables

CONCEPT: VA healthcare and related benefits [Facts, Procedures]

ATTITUDES / DISPOSITIONS: Confidence that they can understand benefits and application processes; readiness and active participation by asking questions and taking notes; care for precision and attention to detail when gathering necessary information and applying for benefits.

Current Priority: MEDIUM

- I. VA Healthcare
 - A. Description of VA healthcare services available to all service members, including VA Mental Health care
 - 1. Additional information about counseling and outreach through VET Center that are located independent of VA healthcare centers
 - 2. Description of Women-specific care offerings in VA healthcare
 - B. Description of priority tables 1 through 8 and what each of these offer in terms of healthcare
 - C. Interactive tool exploration to determine possible healthcare plans available for different eligibility criteria including service-disabled, presumptive condition screenings, war 3 years eligibility after post-9/11 service and income influences.
 - D. Use ebenefits health locator tool to find VA health centers, Vet Centers, and outpatient care clinics

CONCEPT: Home benefits [Facts, Procedures]

ATTITUDES / DISPOSITIONS: Confidence that they can understand benefits and application processes; readiness and active participation by asking questions and taking notes; care for precision and attention to detail when gathering necessary information and applying for benefits.

Current Priority: LOW

- I. VA Home Loan Guarantee
 - A. Explanation of VA Guarantee program
 - B. Discussion of down payment, no PMI, and VA funding fee
 - 1. Highlight disability payment influence of VA funding fee waiver
 - C. Website navigation exploring to VA Loan limits by zip code
 - D. Exploration on ebenefits portal of how to apply for Certificate of Eligibility for VA home loan guarantee
 - E. Demonstration of regional loan center contact information available online at ebenefits

CONCEPT: Education benefits [Facts, Procedures]

ATTITUDES / DISPOSITIONS: Confidence that they can understand benefits and application processes; readiness and active participation by asking questions and taking notes.

Current Priority: MEDIUM

- II. VA Education Benefits
 - A. Determination of various eligibility markers for various education benefits
 - 1. Legacy benefit Montgomery GI Bill criteria, payment rates
 - 2. Description Post 9/11 GI bill service requirement and description of payment options
 - a) Tuition and Fees payment rates for in state and private schools
 - b) Basic Allowance for Housing (BAH) description

- (1) Levels of payment based on course load
 - (2) Level of payment based on online vs in person attendance options
 - c) Transfer option for some service members to family members
 - (1) Description of service requirement and separate application deadlines and use deadlines for dependent children.
 - (2) Explanation of best practices of transfer of benefits to family members before leaving service.
- B. Website navigation of GI Bill Comparison Tool on va.gov to determine payment rates and improve decision making processes of TSM based on individual education choices and varying options.
- C. How to navigate and manipulate GI Bill Comparison Tool to provide date points on education and school choices.
- D. Scenario presentation exercise. Participants should be able to verbalize and discuss possible choices and consequences of choosing one benefit over the other. Results and dialogue will be shared in class and monitored by instructor.
- E. Explore ebenefits.va.gov website in class
 - 1. Self-navigate privately to ebenefits and locate application and selection
- F. TSM's will execute successful transfer of education (at least 1 month) to dependents and add deadline information to their personal action plan.
- G. How to follow up about the benefit if their home changes or circumstances change (ex: if they drop out of a class or don't complete a class, they're required to pay the money back to the VA).

Task Analysis: Ownership & Responsibilities

TSMs must take ownership over their pursuit of benefits. It is the TSMs responsibility to initiate any processes, applications, or queries for information. Generally, help is not offered unless the TSM seeks it.

CONCEPT: Roles involved in pursuing benefits [Facts, Attitudes]

ATTITUDES / DISPOSITIONS: Ownership over actively participating by asking questions and taking notes; ownership over pursuing desired benefits; readiness to seek assistance as necessary; care for precision and attention to detail when gathering necessary information and applying for benefits.

Current Priority: HIGH

- I. The VA offers benefits for veterans
- II. The VA and DoD mandate this Required Benefits Course to help veterans understand and apply for benefits
- III. The veteran must accurately understand and correctly apply for benefits
- IV. Veterans may be denied benefits for which they have applied (for example, due to incorrectly filling out application forms, missing application deadlines, or applying for benefits for which they are ineligible)

CONCEPT: TSM responsibilities when pursuing benefits [Facts, Rules]

ATTITUDES / DISPOSITIONS: Ownership over actively participating by asking questions and taking notes; ownership over pursuing desired benefits; readiness to seek assistance as necessary.

Current Priority: HIGH

- I. Identify appropriate benefits for which to apply

- II. Understand all requirements / eligibility criteria for desired benefits
 - A. Seek additional information about benefits from credible websites and texts, credible individuals, etc.
- III. Understand and adhere to application timelines and due dates
- IV. Apply using the appropriate methods and processes
- V. Track the status of their application using the appropriate method (ebenefits.va.com)
- VI. Follow up regarding their benefits, as necessary

CONCEPT: Long-term ownership of benefits [Facts]

ATTITUDES / DISPOSITIONS: Ownership over pursuing desired benefits; willingness to keep informed about benefits and monitor changing benefits statuses.

Current Priority: LOW

- I. Benefit statuses can change over time. New benefits may be added.
 - A. Keep informed of issues regarding your conditions that could eventually be recognized in veteran benefits (ex: burn pit registry; Agent Orange poisoning)

CONCEPT: Active participation in VA Benefits course [Facts, Procedures]

ATTITUDES / DISPOSITIONS: Ownership over their benefits by active participation in the course; Readiness to actively participate and to ask questions if needed.

Current Priority: LOW

- I. TSMs should actively participate by noting the benefits they want, and noting any information that will help them get those benefits
- II. Final Summary of skills and objectives
 - A. Servicemembers should take all information in the course and synthesize it into a personally tailored list of benefits to apply for, with application timeline crafted, as well as decision making points on how to apply, where to gather additional information and seek help.
 - B. TSMs will be reminded of search database on ebenefits to seek additional help from local VSO's as well as reach out to VA regional staff and their Benefits Advisor (the instructor of the course).
- III. Make use of the provided Course Guidebook
 - A. Mark useful information
 - B. Make crucial notes about desired benefits, timelines

Task Analysis: Preparation & Information-Seeking Attitude

TSMs should begin transition procedures, prepare necessary materials, and be ready and willing to proactively seek any information they need about VA benefits.

CONCEPT: Transition procedures / resources to finish ASAP [Facts, Procedures]

ATTITUDES / DISPOSITIONS: Willingness to prepare by seeking required materials; eagerness to “get ahead” of the process by beginning preparations as early as possible.

Current Priority: MEDIUM

- I. Preparing by seeking information and getting necessary documents/resources will help the process go much smoother.
- II. Start retirement or separation counseling process with their branch of service. Make contact via phone or email with military separation counselor that will advise you on the next steps.
- III. Watch online pre-separation online module to prepare expectations
 - A. The video module will introduce how to register for the Veteran’s website and how it useful and crucial to being prepared for class. It will also talk about the types of paperwork and personal information that Transitioning Service Members (TSM’s) should begin organizing to be successful in the course.
- IV. Register-get password for VA site called “ebenefits” (ebenefits.va.gov)
- V. Request a copy of medical records with assigned military (DoD) medical provider. (this could take 30 days to receive fully electronic copy or other paper records from non-military providers)** If medical records are not in TSM possession at start of course, they may and should still attend scheduled class.
 - A. Request Dental records separately
 - B. Request Mental Health records be included if you wish

CONCEPT: Readiness to seek information from credible sources of VA benefits information [Facts, Attitudes, Cognitive Procedures]

ATTITUDES / DISPOSITIONS: Willingness to seek additional information; desire to locate high-quality information.

Current Priority: MEDIUM

- I. TSMs will likely have questions, and will need to proactively seek information.
- II. Identify authoritative sources of information to learn about benefits in general, seek specific information for specific benefits, and to solicit help if they need assistance in understanding or applying for benefits.
 - A. VA.gov and .mil sources
 - B. Recognized VSO website
- III. Summary of interpersonal skills/techniques for soliciting help from benefits SMEs.

CONCEPT: Applying for benefits [Facts, Cognitive Procedures]

ATTITUDES / DISPOSITIONS: A sense of “grit” to stick through the application process; willingness to seek help if necessary.

Current Priority: HIGH

- I. eBenefits to file claims yourself
 - A. Can do online
- II. Applying with a Veterans’ Service Organization
 - A. Provides extra help / explanation to help navigate complexity

Gap Analysis

The findings below were synthesized from the research activities detailed earlier in this report: TSM survey (n=10); TSM interviews (n=5); and SME interviews (n=2). For more information about our data from SMEs, see the [Appendix](#). The below findings were validated with two SMEs.

Current State	Desired State	Root Cause	Evidence for Root Cause	Strategies to Address
TSMs are not fully engaged with the course.	TSMs are highly engaged throughout the course.	The course doesn't always focus on the benefits a TSM wants or needs. Also, this course comes at the very end of Transition Week -- TSMs are burnt out at this point.	TSM survey and interviews; SME interviews.	Tailor the course to TSMs to offer just-in-time learning based on their individual benefit interests. Separate the VA Benefits Course from the Transition Week to avoid burnout.
TSMs are not receiving the desired level of information about benefits.	TSMs receive comprehensive information about benefits and how to apply for each benefit.	"One size fits all" nature of the course requires that the course move quickly to cover all benefits in one session.	TSM survey and interviews; SME interviews	Break the course into separate "niche" courses.
During the course, TSMs are not getting the desired level of help filing for benefits.	TSMs are able to receive help and apply for benefits during the course, with an instructor present to help.	Spotty internet access across learning locations; though the course is long, each part is too short to allow much time to apply for benefits.	TSM survey and interviews; SME interviews	Break the course into separate "niche" courses; create communities of practice to help TSMs support one another (and centralize people who need support).
Many TSMs are not sure if they have missed out on benefits.	TSMs should know whether or not they have missed out on benefits, and how this can be remedied.	Overwhelming amount of information in the course, coupled with very complex (and confusing) application processes for benefits.	TSM survey and interviews	Integrate benefits courses with JKO (Joint Knowledge Online; a military online knowledge and learning portal) to create a quick reference index. Create communities of practice.
TSMs do not feel well-prepared to navigate the complex landscape of VA benefits after attending the course.	TSMs feel confident that they can pursue benefits, and have a clear action plan to obtain benefits.	Currently, there's an overwhelming amount of information across many benefits in the course.	TSM survey and interviews.	Break the course into separate niche courses; build a system that allows people to pick their desired benefits to receive a custom "roadmap" for applying for benefits.
TSMs are surprised by the complexity and opacity of the VA benefits system when they apply for benefits.	TSMs fully understand the system's complexities, and how to cope.	The current course does not spend much time talking about the benefits landscape, and does not give TSMs an accurate idea	TSM survey and interviews.	Include more information about the complexity of the benefits landscape.

		for how much complexity they'll need to deal with.		
TSMs feel that the course does not provide specific help tailored to their situation.	TSMs get help that is tailored to their situation as TSM.	The current course is "one size fits all." There's not enough time to provide more information about each benefit under the current course structure.	TSM survey and interviews.	Break the course into multiple "niche" benefits courses.
TSMs spend large amounts of time researching benefits outside of the course, and often follow up with instructors after the course with questions and requests for help.	TSMs spend only a little time researching benefits and application processes; enough to answer quick factual questions.	The course does not give enough information about the application processes, and the overwhelming information makes it difficult to understand which documents and resources are needed.	TSM survey and interviews.	Provide a quick reference guide / resource that can quickly direct TSMs to specific resources and solutions for their questions. Increase course engagement by better tailoring content to TSMs.
Internet access is unreliable, which prevents TSMs from trialing the application process during the course.	The course and course materials are robust to lapses in internet access.	"Red tape" and lack of funding.	SME interviews.	Include recordings of the modules on JKO to mitigate the effects of internet outages. Include "how to apply" resources on JKO. Design Communities of Practice for each benefit with an Instructor who can help TSMs in the Community of Practice apply for benefits.

Gap Analysis, Synthesis

Given our findings, we believe the most viable way forward is to break the course into modules:

1. **Benefits 101 module:** Educates TSMs on important benefits concepts and what benefits are available (1 hour mandatory course). Based on their interests and needs, TSMs may attend a niche module after attending this Benefits 101 module.
2. **Niche benefits modules:** each module educates TSMs about one "family" of benefits in deep detail. Each module will cover the family of benefits in great depth, and leave enough time for exercises and questions. TSMs register to attend based on their interest in the benefits:
 - a. Disability Benefits
 - b. Healthcare Benefits
 - c. Education Benefits (1.5 hours)
 - d. Home & Life Care Benefits

Limitations and Constraints

1. **Time Limitations.** Due to time limitations, we will focus only on two of the modules shown in the Gap Analysis; Benefits 101 and Education Benefits. These two modules were selected because they offer a good cross-section of material and issues that best represent the overall course.
2. **Difficulty of Gathering Data.** The nature of this course is that TSMs who participate are in the process of transitioning out of the military and in most cases physically leaving the area. For this reason, capturing feedback from former students is difficult.
3. **Organizational structure of the course.** The existing course is funded by the Department of Defense (DoD), and largely conducted by personnel working for the Veterans Administration (VA). Various topics covered include material from both DoD and VA. This limits the ability of instructors to make substantial changes to the existing course material.
4. **Course time constraints.** The existing course requires a lot of material to be presented during the 40 hours of lessons. Due to several factors beyond control of the facilitators and instructional designers, extending the course duration is not possible. The instructional design team must remain within the constraints of the existing course duration.

Context Analysis

Orienting Context

Participants in this revised course structure should feel comfortable, competent, and confident when pursuing benefits and seeking information to help them pursue their benefits.

- **Motivation:** The motivation for TSMs to attend any and all of these modules include: to attend the mandatory module (Benefits 101 module); to learn how to effectively pursue benefits they may desire for themselves and their family; and to experience less stress and anxiety when pursuing benefits. By better tailoring modules to the needs and wants of attendees, we hope to motivate TSMs to stay engaged with the content.
- **Benefits:** Our research shows that the benefits system is confusing, and that TSMs aren't confident that they haven't missed out on benefits. Benefits for attending these modules include: easier pursuit of the benefits they want and need; confidence that they have not missed out on benefits; and confidence that they are supporting themselves and their families to the fullest extent allowed by the benefits system.
- **Managerial Support:** TSMs are currently mandated to attend the VA Benefits Course, and their supervisors must allow them to attend. Likewise, TSMs will be granted time to attend the mandatory Benefits 101 modules, plus additional modules for benefits they desire. Their current Transition Office will support them, and will also assist in advocating to attend the course if their supervisor is uncooperative.

Instructional Context

- **Structure:** *Benefits 101 module:* 1.5-hour, mandatory module held in an office provided by the base's Transition Office. *Education Benefits module:* 3-hour course optional module held in an office provided by the base's Transition office. Each module will be held frequently.
- **Location:** All modules will be held on military bases, in a classroom or conference room maintained by the base's Transition Office. If no space is available, the module will be held in an approved site near the base.
- **Registration:** To attend any module, TSMs must call their base's Transition Office and speak with a representative to register for desired modules. They do not need to register for all desired modules at once. They are responsible for scheduling paid leave with their supervisor.
- **Number of learners:** All modules are designed for 40 TSMs. In keeping with current policy, the module will be cancelled if fewer than 5 TSMs register for a module. If more than 50, additional instructors are required to be present.
- **Materials and technology:** Transition Office locations for all modules are equipped with seats and tables to accommodate 50+ students, a projector and screen, and 1 laptop for each attending servicemember. Each location is supposed to provide internet access for each TSM, but in practice this is not always the case. Additionally, each TSM will be issued a Briefing Packet; this packet will contain high-level information about all benefits, information about how to apply for benefits, eligibility requirements and timelines for benefits, and information about required documents to apply for benefits. Lastly, the packet will contain information about the JKO learning platform, and how to find relevant information and benefits tutorials there.

Transfer Context

- **Practice during module:** Each module will feature "decision scenarios," wherein the instructor poses benefits scenarios to the class to allow TSMs to work through the scenario on their own or in small groups. If internet access is available, TSMs will also practice the application process for various benefits during the class by visiting the application portals.
- **Transfer to real-life applications:** As TSMs are transitioning out of service, they will have immediate opportunities to apply these skills. Course materials will instruct them on which materials they should begin gathering ASAP (ex: for medical benefits, they should order copies of their medical records immediately).
- **Resources to aid skills transfer:** Course materials will be designed as quick-reference materials to allow TSMs to solve specific benefit-related problems. Online modules will also be available (through the JKO platform) for TSMs if they need a refresher on module content.

Instructional Objectives

In the **Benefits 101** module, learners will:

- Explain their role and responsibilities when pursuing benefits [*cognitive, affective*].
- Describe the tasks to be completed before discharge from service [*cognitive*].
- Describe the broad types of benefits available to them, including specific benefits in each "family" of benefits (Disability, Education, Home Loan Guarantee & Insurances, Healthcare) [*cognitive*].
- Evaluate which benefit families (if any) they would like to pursue [*cognitive, affective*].
- Determine which additional benefits modules (if any) they would like to attend [*cognitive, affective*].

In the Education Benefits module, learners will:

- Explain that they are responsible for pursuing their own benefits *[cognitive, affective]*.
- Evaluate the benefits within the Education benefit family, based on personal criteria *[cognitive]*.
- Identify whether transferring their Education benefits is right for them *[cognitive]*.
- Recognize which education benefit is right for them, if they must choose between only one of many options *[cognitive]*.
- Create an individual action plan to prioritize actions they need to take toward pursuing a benefit *[cognitive]*.
- Plan out steps on how to follow-up on their applications for all benefits they file for *[cognitive, affective]*
- Identify sources from which to seek additional, credible information and help from online sources *[cognitive]*

Instructional Strategies

Benefits 101 Module (1.5 hours)

This module is a brief introduction to the concept of VA benefits. It will provide a brief overview of the main 4 “families” of benefits offered to veterans by the VA. The main purposes of this module are to provide a brief and economical overview of benefits, have the TSM identify which benefits they are interested in, and to have TSMs identify subsequent modules they want to attend in order to learn more about their desired benefits.

Event	Instructional Objectives	Instructional Approaches and Strategies	Method & materials	Time
Section 1: Introduction	Explain their role and responsibilities for obtaining benefits, and summarize general requirements for applying for benefits.	<p>Introduction: Instructor introduces themselves and their background. Instructor passes out copies of student handout (or have pre-staged on each student’s desk prior to start of module).</p> <p>Video (motivating activity): The Instructor will show a brief video featuring brief stories of veterans who have had positive experiences with some VA benefits. The veterans in the video also encourage being proactive and seeking advice and taking VA coursework to ensure success.</p> <p>Lecture: The Instructor will segue this video into a brief discussion on statistics about how many veterans accidentally leave benefits on the table and have trouble with application processes.</p>	<p>Methods: In-person presentation (PowerPoint) + notes</p> <p>Active note-taking</p> <p>Activity</p> <p>Materials: PowerPoint presentation print-out + notes</p> <p>Benefits Overview handout</p> <p>Benefits Issues Video</p>	20 mins.
Section 2: Tasks to complete before discharge from service	Describe the tasks to be completed before discharge from service.	<p>Lecture: this will cover the basic elements of what TSMs need to do before their discharge from service, in preparation to pursue/apply for any VA benefits. It will cover common issues including meeting requirements for transferring Education benefits, and filing for medical records well in advance (at least 30 days) of when they plan to file for benefits. Discussion on tasks that can be done after TSM is discharged: everything else can wait.</p>	<p>Methods: In-person presentation (PowerPoint) + notes</p> <p>Active note-taking</p> <p>Materials: PowerPoint presentation print-out + notes</p> <p>Active note-taking</p> <p>Individual Action Plan handout</p>	20 mins.
Section 3: Benefits Overview	Describe the broad families of benefits available to them, including specific benefits in each	<p>Lecture: Using the PowerPoint Presentation, the Instructor will describe the concept that every veteran is eligible for some type of VA coverage. The Instructor will briefly describe the basic family of benefits: Education, Disability,</p>	<p>Methods: In-person presentation (PowerPoint) + notes</p> <p>Active note-taking</p> <p>Materials:</p>	30 mins.

	<p>“family” of benefits (Disability, Education, Home Loan Guarantee & Insurances, Healthcare).</p>	<p>Healthcare, VA Home Loan & Insurance. In addition to these general topics, the Instructor will touch on specialty topics: transferring education benefits; eligibility for the Montgomery GI Bill; when to start thinking about Disability benefits and when to file for them; when they’re eligible to sign up for Healthcare before leaving and what is available; and Home Loan/Insurance.</p> <p>TSMs will be encouraged to follow along in their Benefits Overview handout.</p> <p>Open Questions: The Instructor will solicit questions from the class.</p>	<p>PowerPoint presentation print-out + notes</p> <p>Benefits Overview Handout</p>	
<p>Section 4: Identifying benefits of interest</p>	<p>Determine which of the 4 benefits family (if any) they would like to pursue.</p>	<p>Individual Activity: Following brief instructions from the Instructor, the TSMs will work individually to select which benefit families they are interested in pursuing. They will use the Benefits Overview handout to review benefits, and fill in information in their Individual Action Plan handout.</p>	<p>Materials: PowerPoint presentation print-out + notes</p> <p>Benefits Overview handout</p> <p>Individual Action Plan handout</p> <p>Methods: Activity</p> <p>Active note-taking</p>	<p>10 mins.</p>
<p>Section 5: Choosing to attend subsequent benefits modules</p>	<p>Determine which additional benefits modules (if any) they would like to attend.</p>	<p>Lecture: The instructor will briefly inform TSMs of the availability of specialized benefits modules, which go into depth about each of the 4 main benefits families (including information about how to apply for those benefits).</p> <p>Individual Activity: Students will review the available benefits modules and will select which modules they would like to attend. They will have the contact information required to register for upcoming benefits modules.</p>	<p>Materials: PowerPoint presentation print-out + notes</p> <p>Calendar of upcoming benefits modules</p> <p>Methods: Activity</p> <p>Active note-taking</p>	<p>5 mins.</p>
<p>Questions</p>		<p>Open Questions: TSMs will be encouraged to ask any questions about pursuing benefits or benefits modules.</p>	<p>Materials: All materials</p> <p>Methods: Open question format</p>	<p>Remaining Time</p>
<p>After module (followup)</p>		<p>Individual, out-of-class follow-up: Students follow-up by calling their local Transition Office and registering for specific modules to gain in-depth knowledge about their benefits of</p>	<p>Materials: All materials</p> <p>Methods: Individual self-guided</p>	<p>N/A</p>

		choice.	follow-up, outside of class	
After module (online quiz)	All	After the module, TSMs will complete a short online quiz. The quiz will take them through crucial concepts and provide immediate feedback on their answers as a form of Summative Assessment. Completing the quiz is required to receive credit for attending the module.	Materials: Online quiz	After module

Education Benefits Module (3 hours)

One of 4 total modules available (1 module for each major “family” of benefits) to learn in-depth information about a benefit and how to apply. The module is designed to be economical with time; it seeks to provide a great depth of information, but also to limit the amount of class time by as much as possible to be respectful of TSM time (many of whom would need to take time off of their work to attend). By the end of this module, TSMs should have all of the information necessary to know what Education benefits to pursue, how to apply, and how to follow up on their application if needed.

If desired, TSMs can also attend other modules for in-depth instruction about the other major benefits families.

Event	Instructional Objectives	Instructional Approaches and Strategies	Method & materials	Time
Section 1: Introduction & Benefits Overview	TSMs will explain their responsibilities when pursuing benefits (namely, that they are responsible for pursuing their own benefits). Rewrite as: “TSMs will explain that they are responsible for pursuing their own benefits.”	Introduction: Instructor will introduce themselves and the goals for the module. Lecture: A brief review of: the four major “families” of VA benefits (as a review of content from the Benefits 101 module); TSM roles and responsibilities regarding the pursuit of benefits; and common issues when applying for Education benefits (content from the Benefits 101 module). Class-Wide Activity (motivating activity & information-gathering for instructor): The instructor will take an informal, raised-hands “poll” of the class to ascertain who fits into the following categories: intends to get an undergraduate degree; intends to go to graduate school; intends to transfer Education benefits to their kids or another dependent; doesn’t know what they want to do with Education benefits.	Method: In-person presentation (PowerPoint) Active note-taking Class-wide activity Materials: PowerPoint presentation print-out + notes Benefits Overview handout	20 minutes.
Section 2: Education Benefits	Evaluate the benefits within the Education	Video (motivating activity): A quick video featuring 4 veterans briefly discussing their experience of applying for VA benefits, and	Method: Brief video	40 mins.

	<p>benefit family, based on personal criteria</p>	<p>issues they experienced when attempting to apply. The video will highlight common issues experienced by veterans. It is intended to prime TSMs to pay attention to certain topics during the instruction, in order to help them avoid common problems.</p> <p>Lecture: this will introduce TSMs to the two major benefits within the Education family of benefits: The Montgomery GI Bill, and the Post 9/11 GI Bill. Each offers different advantages and disadvantages, and TSMs can choose only one of these benefits to apply for.</p> <p>Concurrent Individual Engagement Activity: While learning about these benefits, TSMs will use their Benefits Summary Sheet to indicate (on each benefit) which requirements they meet, and what specific needs they have that may later help them choose which education benefit is best for them.</p> <p>Scenario 1 (15 mins): This scenario will help TSMs understand how to choose Education benefits based on personal situations.</p> <p><u>PRE-TASK:</u> Instructor will prepare the class by saying he/she will present a hypothetical scenario regarding “Jared” and his education plans and needs. First the instructor will divide the room into groups (Instructor will determine the size of the three groups based on the number of attendees). A Rubric will be presented on-screen to help TSMs frame their responses.</p> <p><u>TASK:</u> Jared is an Army W-3 that has served on active duty for 22 years and is ready to retire. He has a bachelor's degree and is considering getting a Masters Degree and a PMP certification. He used some (10 months) of his Montgomery GI Bill in the service. What education program should Jared think about using next and why? How much of his education would be paid for?</p> <p><u>POST-TASK:</u> Instructor will ask for the spokesperson of each group to present their findings/decision and contributing variables they thought were most important to their decision. Instructor will debrief and give feedback on any misconceptions (also</p>	<p>In-person lecture (PowerPoint)</p> <p>Active note-taking</p> <p>Materials: Benefits Overview handout</p> <p>Online Resources handout</p> <p>PowerPoint presentation print-out + notes</p>	
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		<p>functioning as a form of Formative Assessment). A Rubric Is provided to the instructor to help reframe and guide students as they articulate their decision thinking.</p> <p>Scenario 2 (15 mins): This scenario will help TSMs understand how to choose Education benefits based on personal situations.</p> <p><u>PRE-TASK:</u> Instructor will prepare the class by saying he/she will present a hypothetical scenario regarding “Dee” and her education plans and needs. The class will remain in the same groups. A Rubric will be presented on-screen to help TSMs frame their responses.</p> <p><u>TASK:</u> Dee is a Petty Officer that has served on active duty for 32 months and is leaving the Navy honorably. She is going to a full time job next and is considering finishing up her bachelors degree part time (she already meets her associates credentials) What education program should Dee think about using and why? How much of her education would be paid for? What parts would not be covered by your choice?</p> <p><u>POST-TASK:</u> Instructor will ask for the spokesperson of each group to present their findings/decision and contributing variables they thought were most important to their decision. Instructor will debrief, offer counterpoints, and give feedback (also functioning as a form of Formative Assessment). The Instructor will use a provided Response Rubric/Checklist to ensure all responses include all necessary considerations.</p>		
<p>Section 3: Special Topics - Transferability of Benefits (Post 9/11 Bill), Yellow Ribbon program, GI Bill Comparison Tool</p>	<p>TSMs will identify whether transferring their Education benefits is right for them.</p>	<p>Lecture: This will cover what TSMs need to know in order to <i>transfer</i> their benefits to another person (ex: a dependant). This lecture will also provide an overview of the Yellow Ribbon Program, the VA’s contribution-matching program, and how to identify if a school participates in the Yellow Ribbon program.</p> <p>Guided Individual Activity, or Instructor Demonstration: If there is an available internet connection, TSMs navigate to the GI Bill Comparison tool for guided instruction on how</p>	<p>Method: In-person presentation (PowerPoint)</p> <p>Active note-taking</p> <p>Materials: PowerPoint presentation print-out + notes</p> <p>Video demo for GI Benefits Tool</p> <p>TSM Laptops</p>	<p>40 mins.</p>

		<p>to use it to assess how their benefits will be applied to specific colleges/universities. If no internet connection is available, the instructor will play a video demonstration.</p> <p>Scenario 3: This scenario will help TSMs understand how to transfer Education benefits based on personal situations.</p> <p><u>PRE-TASK:</u> Instructor will prepare the class by saying he/she will present a hypothetical scenario regarding “Eleanor” and her children: “Mini Eleanore” and Chuck. First the instructor will divide the room into groups (Instructor will determine the size of the three groups based on the number of attendees). A Rubric is provided to the instructor to help reframe and guide students as they articulate their decision thinking.</p> <p><u>TASK:</u> Eleanore is a retiring Colonial in the Air Force. She has achieved all her education needs but is more interested in the education of Mini Eleanore (age 16) and Chuck (age 10). She remembers successfully transferring her education benefits to her kids around 4 years ago by signing up for additional service. What education program should Eleanore think about using and why? How much education could her children achieve with the benefits? What are some concerns/deadlines and best practices to be aware of?</p> <p><u>POST-TASK:</u> Instructor will ask for the spokesperson of each group to present their findings/decision and contributing variables they thought were most important to their decision. Instructor will debrief and give feedback on any misconceptions (also functioning as a form of Formative Assessment). The Instructor will use a Response Rubric/Checklist to ensure all responses include all necessary considerations.</p>		
<p>Section 4: Benefits Selection</p>	<p>Recognize which education benefit is right for them, if they must choose between only one of many options.</p>	<p>Clarifying Questions & Individual Activity: Based on the information they have gathered so far -- including their notes and selections made on their Benefits Summary handout-- TSMs will choose which of the two benefits most closely meets their needs. TSMs are encouraged to ask clarifying questions during this activity. NOTE: there is a manageable number of considerations</p>	<p>Method: Individual activity + open question format.</p> <p>Active note-taking</p> <p>Materials: Benefits Summary handout</p>	<p>15 mins.</p>

		when choosing benefits, so this should be a quick process if they've been using their Benefits Overview handout to help them choose which benefit to apply for.	PowerPoint presentation print-out + notes	
Section 5: Actions to apply	TSMs will create an individual action plan to prioritize actions they need to take toward pursuing a benefit (ex: I need more information; I need to apply).	<p>Lecture: This will educate TSMs on the series of steps required to apply for education benefits. TSMs will learn key rules for applying for education benefits (apply on time; obtain certificate of eligibility by using ebenefits website to input information and get certificate).</p> <p>Individual Activity: TSMs will use information from the presentation and other handouts to fill out any missing components of their individual Action Plan (including what information/documents to gather, due dates and timelines, etc.)</p>	<p>Method: In-person presentation (PowerPoint)</p> <p>Active note-taking</p> <p>Materials PowerPoint presentation print-out + notes</p> <p>Action Plan handout</p>	20 mins.
Section 6: Follow-up	TSMs will understand how to follow-up on their applications for all benefits they file for.	<p>Lecture: This section will take TSMs through processes/strategies for following up on their benefits to check the status of their Education benefits application, and to ensure their application is still in-process and has not been lost or stalled. It will also briefly walk TSMs through other common situations for follow-up, including what to do if they move, or if they drop out or do not complete a class.</p> <p>Concurrent Individual Engagement Activity: During the lecture, TSMs will take important notes and use their Action Plan handout to fill in important information about following up on benefits after applying.</p> <p>Individual Activity: At the close of the lecture, the instructor will guide the students to va.gov, with instructions to find the closest VA Educational counselor near the school of their choice. Students will be given 2-3 minutes to write this information down in their personal action plan.</p>	<p>Method: In-person presentation (PowerPoint)</p> <p>Active note-taking</p> <p>Concurrent engagement activity</p> <p>Materials PowerPoint presentation print-out + notes</p> <p>Action Plan handout</p> <p>TSM Laptop</p>	15 mins.
Section 7: Resources for Help	TSMs will identify sources from which to seek additional, credible information and help from online sources .	<p>Lecture: This will introduce TSMs to resources from which to seek credible information about Education benefits (including VA YouTube Channel, Va.Gov email list, VA webinars), and will also cover sources of in-person help for Education benefits.</p>	<p>Method: In-person presentation (PowerPoint)</p> <p>Active note-taking</p> <p>Open questions</p>	15 mins.

		<p>Open Questions: The instructor will pose a short series of questions to the class. These questions will be “mini scenarios” to help TSMs exercise when (and how) to seek information in-person with a VA Benefits Advisor and/or Education Counselors. Answers to questions will be solicited from TSMs, and the Instructor will briefly offer feedback on responses.</p>	<p>Materials: Benefits Overview sheet</p> <p>Resources handout</p> <p>PowerPoint presentation print-out + notes</p>	
Section 8: Lab Time	N/A	<p>Individual Activity & Open Forum: With any remaining time, TSMs can ask questions that will help them clarify questions that arose during the Scenario exercises, and to answer questions about their individual Education Benefit concerns.</p> <p>By the end of the session, TSMs should have completed their Action Plan by marking which Education benefits they aim to apply for, and by filling out the steps required to get the benefit. They will provide this plan to a transition counselor as part of their required paperwork for transition.</p>	<p>Methods: Individual Activity</p> <p>Open Question Format</p> <p>Materials: All listed</p>	Remaining Time
After module	All	<p>After the module, TSMs will complete a short online quiz. The quiz will take them through crucial concepts and provide immediate feedback on their answers as a form of Summative Assessment.</p> <p>Completing the quiz is required to receive credit for attending the module.</p>	<p>Materials: Online quiz</p>	After module

Instructional Materials

- **Presentation Deck:** PowerPoint presentations for Benefits 101 and Education module.
 - **Scenario Rubrics:** Rubrics used by Instructor during each student presentation to evaluate TSM scenario responses
- **Scenario Handout:** A handout to be used in concurrently with scenario instructions shown on PowerPoint. Intended to help TSMs frame their responses to scenarios presented during modules.
- **Benefits Summary handout:** A quick-reference sheet that summarizes the Education benefit, including major considerations.
- **Personal Action Plan handout (General Benefits):** A handout to be completed during the Benefits 101 course that will help TSMs create a general plan for applying for benefits.
- **Personal Action Plan handout (Education Benefits):** A handout that is meant to be filled in by the user. Will include options that the TSM can check/fill in to help guide their decision making around four critical areas:
 - Determine whether to choose the Montgomery GI Bill or Post 9/11 GI Bill

- Determine payment amounts based on time in service or amount of benefits available
- Determine when they need to apply by in order to attend school (if they currently have plans to attend school)
- Determine what their VA Benefits will get them at a certain school (ex: Yellow Ribbon program), if they have chosen a preferred school.
- This action plan is required material for TSMs to outprocess out of the military and will be part of their final counseling appointment.
- **Resources handout:** A handout with information about available resources (online and offline), including DSLogin, eBenefits, and others.
- **TSM Laptop:** A laptop issued for the class, which has internet access (if internet access is available at the location).
- **Video demo for GI Benefits Tool:** A quick video overview of the GI Benefits Tool, including how to find it and how to use it.
- **Benefits Issues Video:** A quick video featuring 4 veterans briefly discussing their experience of applying for VA benefits, and issues they experienced when attempting to apply.
- **Education Benefits Video:** a brief video featuring 4 veterans briefly discussing difficulties with applying for Education benefits.
- **Online quiz:** For each module, a short online quiz intended to assess subject mastery of critical concepts and facts.

Evaluation Plans

Overview of Evaluation Plans

All modules heavily emphasize Confirmative evaluation. This will be critical in justifying the continuation of the program, given the immense scale and costs of this program. Although the instruction time is ultimately increased, we believe this will greatly reduce the need for TSM “customer support,” which should be a substantial cost savings. We also believe that this program will result in greater acquisition of benefits, which will signify a boost in program effectiveness. To further reduce the burden associated with directly evaluating TSMs, we also rely heavily on data obtained from SMEs (course instructors).

The Benefits 101 module is chiefly designed to funnel TSMs into subsequent modules for advanced instruction on their benefits of choice, and to motivate them to take ownership over their benefits applications. Our evaluation plan reflects this by focusing on factors that impact pursuit of benefits (ex: accurate understanding of benefits, attitudes, and actions taken toward attending specialized modules (ex: Education module).

The Education module (and other benefits-specific modules) focuses on teaching important facts and concepts regarding benefits. The goal is to help TSMs apply for benefits. Our Evaluation plans center around how well TSMs have absorbed that information, whether or not it helps them acquire benefits, and whether this program is more effective than the previous incarnation of the program.

Evaluation Cohort: The Evaluation Cohort is a way for us to conduct rigorous evaluations in a more cost-effective manner. Each year, thousands of veterans transition out of the armed forces. To reduce the burden of assessing all TSMs, we will form *Evaluation Cohorts*. These cohorts will consist of representative samples of TSMs (randomly selected). These TSMs will be offered small cash rewards to participate in extra evaluation/assessment activities. By doing this, we will obtain rich information about TSM TSMs and the overall efficacy of the benefits education program without needing to conduct in-depth evaluations and assessments with all TSMs. These Evaluation Cohorts will be formed quarterly, and consist of n=150 TSMs.

Module	Type	Method	Source	Timeline	Specific Info/Use
Benefits 101	Form.	Interview	Formative research with Instructors (SMEs)	Before pilot of new course to TSMs	<i>Interview, questionnaire with satisfaction Likert scale.</i> Subject Matter Experts (SME) were surveyed after gap analysis. Feedback was solicited regarding new course design and materials. SME's were asked to review the growth and change of the course and rate how the changes were meeting the goals they outlined.
Benefits 101	Form.	Limited Pilot Course with Debriefing Interview, Observer Notes	Pilot participants (TSMs & SMEs)	Before rollout of curriculum to broader military audience (2 pilots). Recurring pilot every 2 years (2 pilot sessions) to help inform future iterations of the modules.	<i>Semi-structured interview (2 hours per group), theming/affinity mapping.</i> Course will be presented to preliminary group of TSMs before roll out, with 2 to 3 SME's observing the class. The class will be complete with activities, materials, and personal action plan materials. From the pilot and subsequent research activities, we will gather data including: how convenient the materials are to locate and use; TSM reactions to method, activities, materials, evaluation methods. <ul style="list-style-type: none"> • TSMs will be asked to complete a paper questionnaire at the end of the module pilot to gauge their reactions to the module. • Afterward there will be a Separate debrief (2 hours) with SMEs who will be asked to take a brief paper survey and then offer verbal feedback to a chosen facilitator from the ID team. Feedback will be combined with TSM feedback to help determine changes to be made to the module. • Observers take notes on feedback from the TSMs.
Benefits 101	Summ.	Online Quiz (ungraded for credit)	TSMs (TSMs)	After course completion, but before military separation. (Course	<i>Multiple choice response, fill-in-the-blank response, and scenario-based questions.</i> An online quiz that TSMs will be prompted to take to get credit for the course via the service member transition portal maintained by the TSMs branch of service.

				required to be completed as part of transitioning process, verified during out-processing)	<ul style="list-style-type: none"> • The quiz will consist of a short series of questions that provide automatic feedback regarding correct answers to service members to aid them in their transition journey with timely corrections and prompting. • Post-quiz feedback and links will be provided to the TSM to research further about questions (especially questions they got wrong). • The quiz will provide required documentation of completion of the course in order for the member to successfully leave the military.
Benefits 101	Confirm	Review metrics/ analytics	Transition Office data (all TSMs)	After TSMs attend mandatory Benefits 101 module	<i>Data culled from existing records.</i> Track if TSMs are registering & attending modules with sufficient lead time (ex: 3 months before transitioning), which will indicate that they have enough time to comfortably meet application deadlines for all benefits.
Benefits 101	Confirm	Questionnaire	Course instructors, n=40	Quarterly	<i>Likert scales, multiple choice, open response (short answer).</i> Gather information on: perceived TSM attitudes; questions the Instructors get from TSMs; areas TSMs seem to struggle with; pushback or negative reactions from TSMs.
Education	Form.	Limited Pilot Course with Debriefing Interview, Observer Notes	Pilot participants (TSMs & SMEs)	Before rollout of curriculum to broader military audience (2 pilots). Recurring pilot every 2 years (2 pilot sessions) to help inform future iterations of the modules.	<i>Semi-structured interview (2 hours per group), theming/affinity mapping.</i> Course will be presented to preliminary group of TSMs before roll out, with 2 to 3 SME's observing the class. The class will be complete with activities, materials, and personal action plan materials. From the pilot and subsequent research activities, we will gather data including: how convenient the materials are to locate and use; TSM reactions to method, activities, materials, evaluation methods. <ul style="list-style-type: none"> • TSMs will be asked to complete a paper questionnaire at the end of the module to gauge their reactions to the module. • Observers take notes on feedback from the TSMs.
Education	Form.	Focus group from limited course pilot	Course instructors	Before rollout of curriculum to broader military audience. Course will be presented to preliminary group of TSMs	<i>Semi-structured interview (2 hours per group), theming/affinity mapping.</i> Facilitators and SMEs are selected to discuss learning outcomes and experiences of TSM that require additional help and guidance outside of class/after transition modules/when they apply for benefits. The feedback from SMEs will regard: <ul style="list-style-type: none"> • Questions they get from TSMs • Areas TSMs seem to struggle with

				before roll out, with 2 to 3 SME's sitting in the class.	<ul style="list-style-type: none"> ● Pushback/negative reactions from TSMs ● Additional course needs ● Updated VA materials and laws that have changed needs/application processes etc.
Education	Summ.	Online Quiz (ungraded for credit)	TSMs (TSMs)	After course completion, but before separating from the military.	<p><i>Multiple choice response, fill-in-the-blank response, and scenario-based questions.</i> An online quiz that service members will be prompted to take to get credit for the course via the service member transition portal maintained by the branch of service.</p> <p>The quiz will consist of a short series of questions that provide automatic feedback regarding correct answers to service members to aid them in their transition journey with timely corrections and prompting. Post-quiz feedback and links will be provided to the TSM to research further about questions (especially questions they got wrong).</p> <p>At the end of the assessment, it will ask a short series of questions to gauge TSM reactions to the module, including: module comprehensiveness, TSM confidence in pursuing Education benefits, and overall satisfaction with the module.</p>
Education	Confirm	Survey, Interview	Evaluation cohort (TSMs)	6 months after transition.	<p><i>Likert scales, multiple choice, open response (short answer), open response (short essay); Interviews with Likert scales and rating rubrics (for interviewer use only).</i> The Evaluation Cohort will be subjected to multiple evaluation activities:</p> <ul style="list-style-type: none"> ● Follow-up survey with all individuals in cohort administered 6 months after transitioning out of the armed force; the survey will gather information on for what benefits they applied, and benefit status (accepted, rejected, in-progress) to gauge success, reactions to the process, and retrospective opinions about the benefits modules. The survey will also ask a series of questions to gauge their eligibility for benefits, which will be compared to their answers about benefits they chose to pursue (if any). ● Follow-up interviews with select individuals from the cohort (n=20) to gather more detailed qualitative data about their success, reactions to the process, and retrospective opinions about benefits modules.
Education	Confirm	Review metrics / analytics	VA, DoD data on TSMs	Yearly	<p><i>Data culled from Veterans Administration (VA), Department of Defense (DoD) records.</i> Yearly pull of VA & DoD data to assess TSM accuracy in applying for benefits. This will assess the rate of success in applying for specific benefits, the rate of rejection in applying for specific benefits, and causes of failure</p>

					<p>(ex: missed deadline, ineligible, etc.).</p> <p>NOTE: this will require the VA and DoD to begin tracking rejection rates for benefits. Though this would require substantial DOD/VA policy change (beyond the scope of this project), we recommend that this information be tracked and analyzed yearly in order to better gauge TSM accuracy in applying for benefits.</p>
All Modules	Conf.	ROI Analysis	VA / DoD / Transition Office budgets; and all above data	After 1 year, and every 3 years afterward	<p><i>Financial/budget data, and all above data aggregated into report format.</i> ROI analysis to determine whether the program is cost-effective, in relation to the previous incarnation of the benefits instruction. Dimensions to be assessed are: cost of the modules, application success rate, rate of benefits left on the table, and the cost of time/resources spent assisting TSMs beyond the modules.</p>

Prototypes

To illustrate course materials, we have developed a series of Education Benefits Module prototype. These prototypes are included separately.

1. Education Benefits Module instruction presentation slides
2. Education Benefits Action Plan handout
3. Education Benefits TSM Scenarios handout
4. Education Benefits Scenario Guide document for instructor
5. Education Benefits storyboard for veteran video
6. Education Benefits module assessment mockup

Appendix

Data Collection Plan

1. **GROUP 1: Transitioning service members (TSM) currently taking the benefits course, and veterans who have already transitioned and taken the course.** This will provide data about the classroom experience and the experience *after* attending the VA course. We will survey (n=10; convenience sample) and interview (n=2; convenience sample) this group to get quantitative and qualitative data about them (the *audience*), and information about the *current state and desired state* from the TSM's perspective.
 - a. As the current course is delivered to all TSMs, we will gather information from a sample of TSMs of all ranks, ages, durations of service, backgrounds, and branches of the armed forces.
2. **GROUP 2: Educators who teach the benefits course for TSMs.** These instructors are Subject Matter Experts (SMEs) on the benefits course. We will conduct one round of interviews with them (in person or via phone) to better understand the *learning context* and the *performance context*, and to investigate *gaps between the current state and desired state* from the instructor's perspective.
 - a. This group includes 1 SME who is a member of our Instructional Design team, and 2 external SMEs.

Data Collection Protocol

Survey for TSMs

- 1) **Are you currently, or were you ever, a member of any branch of the United States armed forces?** *Binary choice: Yes // No*
- 2) **How many years were you in the military?** *Multiple choice: 1-4 // 5-19 // 20+ // I'm currently in the military*
- 3) **What was your rank at time of separation? (example: E1, O3)** *Open Response*
- 4) **Did you leave the military AFTER September 11, 2001?** *Multiple Choice: Yes // No // I'm still in the military*
- 5) **Did you take the required VA Transition Course informing you of your VA Benefits as a veteran?** *Binary choice: Yes // No [exit survey if they select No]*
- 6) **How do you feel about the length of the required VA Transition Course?** *Multiple choice: Too short // too long // Just right*
- 7) **In your experience, how useful to your transition was the required VA Transition Course?** *Scale (1-5): Not useful at all - Extremely useful*

- 8) **After the course, how did you feel regarding your benefits?** *Scale (1-5): Not confused at all - Extremely confused*
- 9) **Did you miss out on some or all of your VA benefits?** *Binary Choice: Yes, I missed out on some or all benefits // No, I didn't miss out on any benefits*
- 10) **If yes, please briefly explain what benefit you missed out on (example: education, disability).** *Open Response*
- 11) **Beyond the required VA Transition Course or VA employees, did you research or learn about your VA benefits in any other way?** *Open Response*
- 12) **In an average month, how much time did you spend learning about VA benefits outside of the required VA Transition Course, before or after the course (estimate)?** *Scale:1 hour or less - 20 hours or more*
- 13) **In your experience, what was the most important part of the required VA Transition Course for you?** *Open Response*
- 14) **Based on your needs, how satisfied were you with the following elements of the required VA Transition course?** *Matrix Scale: Extremely unimportant - Extremely important*
- *Education on the VA benefits available to me*
 - *Education on the qualification criteria for specific benefits*
 - *Education on the the processes for filing for specific benefits*
 - *Help accurately completing the filing forms and submitting them*
 - *Help pursuing the filing processes until completion and award of benefit*
 - *How engaging the course is*
 - *The learning technology used in the course (ex: software, hardware)*
 - *The resources offered as part of the course (ex: pamphlets)*
 - *The length/duration of the course*
 - *The amount of work required during the course (in and out of classroom)*
- 16) **Based on your needs, how important do you feel it is to improve these elements of the required VA Transition course?** *Matrix Scale: Extremely unimportant - Extremely important*
- *Education on the VA benefits available to me*
 - *Education on the qualification criteria for specific benefits*
 - *Education on the the processes for filing for specific benefits*
 - *Help accurately completing the filing forms and submitting them*
 - *Help pursuing the filing processes until completion and award of benefit*
 - *How engaging the course is*
 - *The learning technology used in the course (ex: software, hardware)*
 - *The resources offered as part of the course (ex: pamphlets)*
 - *The length/duration of the course*
 - *The amount of work required during the course (in and out of classroom)*

17) What could have been done to improve your experience of learning about accessing your VA Benefits? *Open Response*

TSM Interviews

- 1. Are you currently, or were you ever, a member of any branch of the United States armed forces?**
- 2. How many years were you in the military?**
- 3. What was your rank at time of separation?**
- 4. Did you take the required VA Transition Course informing you of your VA Benefits as a veteran?**
- 5. How long have you been out of the military?**
 - a. Did you leave before or after September 11, 2001?
- 6. How do you feel about the course as a whole? *[High-priority]***
 - a. Do you feel like you were well-prepared or under-prepared for the process of filing a claim?
 - b. Did you research benefits outside of the courses? Why? How?
- 7. Were you able to make use of the information you were taught in the course? How so?**
- 8. What were your biggest “takeaways” from the course?**
- 9. Have you accessed, signed up for, or used any of your VA benefits yet? Can you tell me which ones? *[High-Priority]***
- 10. Did you feel like you were adequately informed about your VA benefits, or no? *[High-Priority]***
 - a. What would have helped you?
- 11. Are there any benefits that you still don’t feel like you are fully informed on?**

SME Interviews

- 1. Do you believe service members are fully engaged throughout most of the current 6 hours of VA benefits?**
- 2. Have you noticed any technical or environmental constraints that either affect your ability to deliver the course, or get in the way of learners accessing the course material?**
- 3. On average, how often do TSMs follow up with you after a course about information they need to access for benefits? *[High-Priority]***
- 4. For those who follow up, which benefit do they need the most guidance on, on average? *[High-Priority]***

5. **In your opinion, how important is it to improve the following elements of the course for TSMs?** *Scale: Extremely unimportant - Extremely important*
- Education on the VA benefits available to them*
 - Education on the qualification criteria for specific benefits*
 - Education on the the processes of filing for specific benefits*
 - Help them accurately complete the filing forms and submit*
 - Help them pursue the filing processes until completion and award of benefit*
 - How engaging the course is*
 - The learning technology used in the course (ex: software, hardware)*
 - The resources offered to TSMs as part of the course (ex: pamphlet, Participants Guide)*
 - The length/duration of the course*
 - The amount of work required of TSMs during the course (in and out of classroom)*
6. **Is there anything you feel needs to be improved about the course?**
7. **Overall, how effective do you believe the current VA Transition Course is for TSMs? [High-Priority]**
- Scale 1-7: Extremely Ineffective - Extremely Effective*

Data Collection Timeline

DATA TYPE	SPECIFIC INFO/USE	SOURCE	TIMELINE
Survey (quantitative & qualitative data)	Gather information about veteran demographics, experiences with benefits, and experiences with benefits course. Will provide audience information and help us spot gaps in the <i>current</i> state of learning vs. the <i>desired</i> state.	Online survey deployed to veterans & TSMs	2/11/2019 through 2/18/2019
Interview, semi-structured (exploratory qualitative data)	Gather detailed data about veteran opinions about the benefits courses. Will further help us refine our understanding of our audience, and will refine our understanding of the <i>current</i> state of learning vs. the <i>desired</i> state. May allow us to gather data about <i>critical incidents</i> that prevented or threatened to prevent TSMs from getting benefits.	Interview with veterans who seperated sometime in the past	2/25/19 through 3/1/2019
Interview, semi-structured (exploratory qualitative data)	Will provide rich information on SME opinions regarding the VA benefits course, including suggestions for improvement. Will help us understand Learning Context	Interview with SMEs	3/1/19 through 3/10/19

	and conduct Gap Analysis. Will provide information about <i>current</i> state of learning vs. <i>desired</i> state of learning from the instructor's perspective.		
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TSM Survey Data

<i>Information Category</i>	<i>Data Source</i>	<i>Learner Characteristics</i>	
Time spent in the armed forces:	Survey	4 to 19 years: 40% 20+ years: 50% Still active: 10%	
Rank at time of separation	Survey	Enlisted: 40% Officer: 60%	
Attitude toward length of course	Survey	Too short: 70% Just right: 30% Too long: 0%	
Attitude toward usefulness of course	Survey	Neutral: 60% Somewhat useful or better: 20% Somewhat not useful, or worse: 20%	
Confusion about benefits after the course	Survey	Moderately confused: 50% Extremely confused: 50% <i>No responses below moderately confused</i>	
Percent of TSMs who believe they missed a benefit	Survey	Yes: 20% Not sure: 80% No: 0%	
Issues reported by survey respondents	Survey	Too much information; missed timelines; trouble adhering to/completing detailed process	
Time spent learning about benefits outside of the course	Survey	More than 10 hours: 50% 4-10 hours: 30% Less than 1 hour: 20%	
<i>Aspect of the mandatory VA Benefits Course</i>		<i>Satisfaction with element</i>	<i>Importance of improving the element</i>
Education on the VA benefits available to me	Survey	Somewhat dissatisfied or worse: 60% Neither satisfied nor dissatisfied: 10% Somewhat satisfied or better: 30%	Very important or more: 100% Moderately important: 0% Slightly important or less: 0%

Education on the qualification criteria for specific benefits	Survey	Somewhat dissatisfied or worse: 70% Neither satisfied nor dissatisfied: 20% Somewhat satisfied or better: 10%	Very important or more: 90% Moderately important: 10% Slightly important or less: 0%
Education on the the processes for filing for specific benefits	Survey	Somewhat dissatisfied or worse: 70% Neither satisfied nor dissatisfied: 10% Somewhat satisfied or better: 20%	Very important or more: 100% Moderately important: 0% Slightly important or less: 0%
Help accurately completing the filing forms and submitting them	Survey	Somewhat dissatisfied or worse: 70% Neither satisfied nor dissatisfied: 30% Somewhat satisfied or better: 0%	Very important or more: 90% Moderately important: 10% Slightly important or less: 0%
Help pursuing the filing processes until completion and award of benefit	Survey	Somewhat dissatisfied or worse: 80% Neither satisfied nor dissatisfied: 10% Somewhat satisfied or better: 10%	Very important or more: 90% Moderately important: 10% Slightly important or less: 0%
How engaging the course is	Survey	Somewhat dissatisfied or worse: 40% Neither satisfied nor dissatisfied: 60% Somewhat satisfied or better: 0%	Very important or more: 40% Moderately important: 60% Slightly important or less: 0%
The learning technology used in the course (ex: software, hardware)	Survey	Somewhat dissatisfied or worse: 60% Neither satisfied nor dissatisfied: 20% Somewhat satisfied or better: 20%	Very important or more: 80% Moderately important: 10% Slightly important or less: 10%
The length/duration of the course	Survey	Somewhat dissatisfied or worse: 60% Neither satisfied nor dissatisfied: 30% Somewhat satisfied or better: 10%	Very important or more: 30% Moderately important: 50% Slightly important or less: 20%
The amount of work required during the course (in and out of classroom)	Survey	Somewhat dissatisfied or worse: 30% Neither satisfied nor dissatisfied: 70% Somewhat satisfied or better: 0%	Very important or more: 70% Moderately important: 20% Slightly important or less: 10%

		better: 0%	
The resources offered as part of the course (ex: pamphlets)	Survey	Somewhat dissatisfied or worse: 30% Neither satisfied nor dissatisfied: 30% Somewhat satisfied or better: 40%	Very important or more: 50% Moderately important: 50% Slightly important or less: 0%

SME Interview Data

Information Category	Data Source	Learner Characteristics & Course Gaps
Overall feelings on the course	Interviews	Instructors feel that the course must be improved. They feel that the course does not meet the needs of all learners. They feel that the current "one size fits all" style of the course does not sufficiently cater to all TSMs. They feel that the amount of information presented at one time is overwhelming -- especially when the course follows a few days of courses for TSMs immediately before the TSMs attend the VA Benefits Course.
Course engagement	Interviews	Instructors feel that many TSMs are not engaged during the course, due to: internet issues at education sites; "one size fits all" approach to course instruction; and the volume of information presented at once.
Technical or environmental constraints	Interviews	Many education sites lack reliable internet connections, which are important to allow TSMs to conduct research during class or to try to apply for benefits during class.
TSM follow-up after the course	Interviews	TSMs frequently follow up after the course to get help from the instructor and to ask questions about benefits. One SME estimates that 30% of TSMs follow up with questions.
Barrier to attendance	Interviews	The current course is several hours. Even though it is mandatory for TSMs to attend, many find it difficult to schedule so much paid time off in one "chunk" of time.
Ideas for course improvement	Interviews	Suggestions include breaking the course apart from the rest of the days-long Transition Week to avoid TSM burnout by the time they arrive at the VA Benefits Course; and splitting the course into two or more courses that are better segmented to meet TSM needs (ex: two courses, one targeted at younger separatees, and one targeted at older retirees) in order to better cater to TSM subgroups.