

Section 2.

RFW: Early History and Training Period

The Veterans Benefits Administration of the Department of Veterans Affairs launched their Plain English initiative in 1995. Since the reader's understanding of this document is the barometer of quality, the initiative is called Reader-Focused Writing.¹

Reader Focused Writing is an initiative applying the research-based methods of technical communication to all of VBA's writing, from letters to forms to on-line manuals. It features audience analysis, a broad repertoire of tested techniques for writing and design, document testing with representative readers, and collaborative writing.²

The Reader Focused Writing (RFW) initiative was a recommendation by the Task Force on Simplified Communication to re-engineer all of VBA's written communication. The Task Force's recommendation was in response to Under Secretary R. John Vogel's request for the representatives to investigate the current state of writing in VBA, to assess the effectiveness of existing improvement programs, and to propose a plan for Agency-wide improvement. Today's RFW program evolved from the decades-long tradition of Veterans Affairs and Veterans Benefits Administration communication improvement between the Agency and the veterans who are their customers.

Writing for Real People. RFW was created from the experience of previous VBA writing improvement programs including Writing for Real People (WRP), an initiative begun in 1990. As RFW's main precedent, WRP was a program appropriating the tools and methods of technical communication for VBA needs. It originated in VARO Jackson, Mississippi.

¹ Stephen L. Lemons, Acting Under Secretary for Benefits, DVA Memorandum, April 15, 1997.

² Task Force on Simplified Communication, Reader Focused Writing: Report to the Under Secretary for Benefits. August 29, 1995.

Before Reader-Focused Writing was initiated, Writing for Real People was the major improvement program active in VBA. The introduction of principles of technical writing into VBA letters including the primary focus on writing to meet the reader's needs, ushered in a new way of thinking about writing in VBA. Many successful improvement efforts resulted. The work done on VBA letters played an important role in laying the foundation for the introduction of Reader Focused Writing in all types of VBA writing.³

In Jackson, a WRP Leadership Team was formed and a technical writing instructor, Nell Ann Pickett, was consulted. Pickett recommended Reva Daniel to become primary trainer. "In late 1990, William Schuetz, Coordinator of Quality Improvement and Training, contracted with Reva Daniel for advice on improving the quality of VA writing."⁴

After Daniel's review of samples of VA writing, . . . Daniel learned that most letter writing in Veterans Benefits Administration consists of adapting pattern letters for individual clients. Thus the goal of the project became to train VA subject matter specialists to develop letters that convey the subject information veterans need in an organization and in a language they can understand.⁵

1991

- **February.** Reva Daniel, writing consultant and owner of Dynamic Business Writing, became a trainer for VARO Jackson. Daniel began training the first group of Jackson employees.⁶ Training included techniques for testing letters using cued-response reading protocols.⁷ Since many veterans who received VA pension benefits in Mississippi had been found to be poor readers, the training was 30 hours of intensive work on writing for poor readers. The last sessions were devoted to supervised

³ Lee Sherrill, *Writing for real people: A brief history of the initiative*, 1997.

⁴ *Ibid.*

⁵ *Ibid.*

⁶ William Schuetz, *VA's Writing for Real People pays off*. Unpublished. December 3, 1994. p 6.

⁷ "In the cued-response protocol tests, a veteran reads a document until he or she comes to a large dot put in the document by the writing team. At the dot, the veteran paraphrases aloud what he or she has just read. When the veteran finishes the letter, a team member asks several previously planned questions to test comprehension further." Reva Daniel, *Revising letters to veterans*, *Technical Communications*, First Quarter, 1995. p 70.

revision of pattern letters, critiques of the revisions, and learning the technique of protocol testing.

- **March/April.** Next came a customer [veterans] needs assessment. Rebecca Burnett, author of the “cued response protocol,” became a consultant. A WRP literature survey was completed. That summer a writing team was formed. This RO writing team with Schuetz and colleagues, gathered data from protocol tests and focus groups. The data indicated effectiveness of the new style of writing. Daniel and Schuetz began “to create letters which relatively uneducated veterans could be expected to understand.” Their second draft of letters was in “consultation with the customers themselves.” They began to train “an initial class of letter writers. The Jackson Regional Office agreed to train a series of writing teams.”⁸ Within VA, the perception of value grew. Very early in the project, the improvement in the letters became so obvious that Jackson VA Regional Office managers could see the project’s merit based solely on the results of this preliminary testing.
- **Fall.** Jackson had committed to training writing teams to revise pattern letters according to the Writing for Real People process. VA Central Office in Washington was convinced by the preliminary evidence to train pilot teams in various Regional Offices across the nation to revise pattern letters in the WRP style. By the end of 1991, Writing for Real People was being tested in Washington and at several other sites.⁹

1992

- **January.** Daniel started class, beginning instruction for VBA letter writers and also began revising VA letters. It was a fourteen week long class. Trainees interviewed the first test-readers by means of the cued response protocol.
- **May.** The Jackson RO trained two classes of employees and revised more than 30 letters and then proposed Writing for Real People as a Southern Area initiative. The WRP team “graduated” that spring. They began revising pattern letters in weekly meetings. Burnett recommended that the writers do a small amount of document testing every few months.¹⁰

⁸ Lee Sherrill, *Writing for Real People: A brief history of the initiative, 1997.* p 2-5.

⁹ William Schuetz, *VA’s Writing for Real People pays off.* Unpublished. December 3, 1994. p 6 ff.

¹⁰ *Ibid.*

1993

- **February.** The Jackson team ran two focus groups of DAV and VFW members to get additional feedback on their work. Both groups agreed that the new letters were superior to traditional letters.¹¹
- **November.** The VA Central Office (VBA Management Council) decided to train pilot writing teams around the country. The Jackson team proposed a plan for follow-through if the Council decided pilot training was worth extending. The plan was to “export” training to all Regional Offices through a “Train the Trainer” course at a cost of about \$150,000.¹² Schuetz presented the project to the VBA Management Council.¹³
- **December.** The Management Council decided to sponsor a pilot course at the Central Office and in at least one station of each Area.¹⁴
- **Fall and 1994, Winter.** Under Schuetz’ lead, the Jackson and Little Rock Regional Offices collected data on effectiveness of new style letters by informal survey and in two controlled studies.¹⁵

At that time VBA staff were trained on and using a WANG system to create pattern letters. In 1993 through 1994, a Personal Computer Generated Letters (PCGL) system was designed and implemented throughout VBA.

1994

- **January.** Proposed Personal Computer Generated Letters (PCGL): Design and Development, as a Blue Ribbon Panel Action Item, suggested these actions and dates: Conduct training 1/94-8/94; Select regional offices to participate 3/94-3/94; Assign letters to regional offices 3/94-3/94; Wrote letters 4/94-10/94; Conduct protocol testing 4/94-12/94; Convert to PCGL format 7/94-12/94; Deploy 9/94-01/95.

¹¹ Task Force on Simplified Communication, Reader Focused Writing: Report to the Unders Secretary for Benefits. August 29, 1995. p 57.

¹² Lee Sherrill, Writing for Real People: A brief history of the initiative, 1997, p 3.

¹³ William Schuetz, VA’s Writing for Real People pays off. Unpublished. December 3, 1994.

¹⁴ Lee Sherrill, Writing for Real People: A brief history of the initiative, 1997. p 3.

¹⁵ VBA Re-engineering report, no date.

- **January and February.** Studies were conducted in the Little Rock VA Regional Office and in the Jackson VA Regional Office during the period October, 1993 and March, 1994.¹⁶
- **February.** Writing For Real People training began.
- **May.** Schuetz and Daniel co-authored a report on the results.
- **During FY 1994.** At a cost of \$80-90,000 ten regional offices and all 5 Central Office Services, Jackson, Philadelphia, Detroit, Milwaukee, Des Moines, Denver, Portland, Washington, D.C., St. Petersburg, and Muskogee; Compensation and Pension, Education, Loan Guaranty, Vocational Rehabilitation, and Veterans Assistance Service received training from Daniel. Writing teams in each of the four VBA Areas of the country and in Central Office revised pattern letters.¹⁷
- **November.** Consistent with guidance given by Under Secretary Vogel, a three year time frame had been established for the implementation of VBA's initial reengineering initiatives. This was to require simultaneous development and implementation of all accepted initiatives.¹⁸ Next the Under Secretary for Benefits appointed a Task Force on Simplified Communications. The Task Force found a number of existing writing improvement programs at the Regional Offices and in the Central Office. The Task Force's conclusions were:¹⁹
 - With no centralized coordination, improvement efforts were fragmented.
 - Teams were left without direction.
 - Central Office efforts were proceeding independently.
 - There was no central "clearinghouse" to field technical and policy questions.

The VBA did not go further with Writing for Real People. The plan to develop and implement a "Train the Trainer" course was not implemented. The Task Force found that both the Writing for Real People and Communicating More Clearly in Writing programs (a Central Area initiative) achieved notable successes. There were also various localized training and writing improvement programs at a number of Regional Offices. In the Central Office, the Office of Information Technology (now the Office of Resource

¹⁶ Task Force on Simplified Communication, Reader Focused Writing: Report to the Under Secretary for Benefits. August 29, 1995, p 57.

¹⁷ Lee Sherrill, Writing for Real People: A brief history of the initiative, 1997. p 3, 7.

¹⁸ VBA Re-engineering report, no date.

¹⁹ Lee Sherrill, Writing for Real People: A brief history of the initiative, 1997. p 3.

Management) used technical writing practices in their new directives and handbooks. Their efforts also were well received.²⁰

Combining and Capitalizing on the Efforts

The history of these programs demonstrated the need for coordination. With no centralized coordination, improvement efforts were seen to be fragmented. Writing teams at several Regional Offices were trained, but left pretty much without direction. The efforts launched in the Central Office were proceeding independently within the Services and Offices. There was no central clearinghouse to field technical and policy questions. Team members were concerned on the one hand that the programs were a “flavor of the month” or on the other, possibly a serious threat to VBA.

The Simplified Communications Task Force recommended that contributions from these various existing improvement programs be rolled into one initiative, Reader Focused Writing. The scope of the initiative would extend to all VBA written communication, including letters, forms, memos, handbooks, pamphlets, circulars, manuals--and to even more recent developments, i.e., the establishment of the National Performance Review (NPR) Plain English Network, VA’s involvement with that initiative through its RFW Implementation Team members, and the proposed Executive Order authored by PEN, have all contributed plans for extending RFW to regulations.²¹

1995

- **August.** The Task Force recommended rolling up contributions from the various existing programs into one initiative. The 23 recommendations in the final report defined the scope of the initiative to extend beyond training to include coordination, marketing with stake holders and interested parties, systems to measure success, and structuring a reinforcement system for effective use of Reader Focused Writing. All 23 recommendations were approved by the Acting Under Secretary for Benefits.²²

²⁰ Ibid, p 3-8.

²¹ Ibid, p 8-9.

²² Ibid, p 4.

Thus the Reader Focused Writing initiative was born. With the Task Force's recommendations approved, VBA continued the work that Writing for Real People and the other improvement programs had begun. The RFW Implementation Team sought to build on the successes these programs had achieved and continued to move forward in the effort to make writing for the customer an important part of VBA's way of doing business.²³

For example, most VARO Detroit employees were first exposed to the RFW concept during the presentation of VBA's Customer Service training that was pioneered in Central Area in 1995. While the RFW orientation was a small portion of that course, many people were quite impressed with the concept and expressed eager anticipation of program implementation.²⁴

Communication training had long been a high priority in the VA and the VBA. Periodic review by VBA and others has led to improvements in benefits services to veterans. Nearly ten years before, GAO reported that claims processing was designed to operate with a high degree of concern for the veteran. For example, when processing claims, VA was required to assist the veteran in gathering necessary evidence and give the veteran the benefit of all reasonable doubt.²⁵ GAO investigated numerous allegations about VA's claims-processing practices and found that the rate of occurrence for most of them was very low or did not appear to adversely affect benefit decisions. GAO did find, however, "significant problems in these areas: notices to veterans concerning VA decisions on disability claims did not provide veterans meaningful information; development of claims was sometimes inadequate; and claims were not always controlled promptly."²⁶ The veteran support noted was primarily done through comprehensible letters. Reader Focused Writing and previous programs trained VBA staff members to prepare better letters each time they communicated with a veteran. No letter writer supervisor wanted GAO's findings to be repeated.

²³ Ibid, p 9.

²⁴ Director, VARO Detroit.

²⁵ General Accounting Office, *Veteran's Benefits: Improvements needed in processing disability claims*. U.S. General Accounting Office, June, 1989. p 2.

²⁶ Ibid.

During 1995, Task Force members contacted the American Institutes for Research (AIR), a Washington, D.C. contractor, for the development of an Orientation module and the RFW Tools Course: scripts, broadcast videos and a participant manual. The VBA staff worked with the AIR staff during the development and delivery of these first two levels of RFW training.

1996

The RFW Training--RFW Tools Course--"roll out" time for all VBA employees who wrote or reviewed letters was in 1996. The course was taught over the Veterans Benefits Network to about 680 VBA employees in 28 stations. Also, 120 VACO employees were taught in a classroom setting at Central Office.²⁷ An ambitious RFW Training Schedule filled the next months.

- **April.** RFW Pilot I course at three Regional Offices (RO).
- **June 3-14.** RFW Pilot II course at seven ROs.
- **July 29- August 2.** Central Office (CO) course I & II.
- **August 5-9.** CO course III & IV.
- **August 12-14.** On-Site Instructor (OSI) course (Baltimore; D.C.).
- **August 19-23.** OSI course (D.C.).
- **August 26-30.** CO course V & VI.
- **September 9-20.** RFW I & II.
- **September 23-27.** OSI course (Baltimore).
- **September 30-October 11.** RFW III & IV.
- **October 15-25.** RFW V & VI.
- **October 28-November 8.** RFW VII & VIII.²⁸

A follow-up session was planned but not carried out. Responding to an inquiry about the need for a follow-up broadcast the Central Area Director wrote that presentation of the follow-up broadcast would demonstrate VBA's continuing support of the use of RFW principles as the accepted method of correspondence with our claimants. He added that the last session would be important as a means of reinforcing the lessons previously learned.²⁹

²⁷ Stephen L. Lemons, Acting Under Secretary for Benefits, DVA Memorandum, April 15, 1997. p 2.

²⁸ Melodee Mercer. Fax to CIRCE, August 29, 1997.

²⁹ Memorandum from Phillip J. Ross to Tanja Henson, May 5, 1997.

- **Fall and Winter.** RFW training was stopped later in the year due to holiday scheduling problems and the desire to examine appropriate “next-steps” for VBA-wide RFW training.

1997

- **April 15, 1997.** Acting Undersecretary for Benefits, Stephen L. Lemons sent a memorandum to VBA Services, Offices and Areas, reviewing the RFW efforts through 1996. He asked the staff to provide comments based on observations and reports of the usefulness of the RFW Tools Course. He solicited ideas on the results of training so far, the possible offering of a follow-up course to those who have taken the Tools course, and further implementation of Reader-Focused Writing.³⁰
- **Late Spring.** Responses were collected from VBA Services, Offices, and Areas. The stations waited for word about future RFW sessions. During this time, some stations chose to continue RFW training on-site using their own materials. Stations requested first time or continued training information from Central Office. An example:

Due to prolonged technical difficulties and to scheduling conflicts, the Louisville Regional Office was not able to participate in the first seven sessions of the Reader Focused Writing Tools course. “We were eagerly anticipating the next offering of the course, originally reported to begin in January/February, 1997.”³¹
- **May.** The Adjudication Division continued to conduct on-going Reader Focused Writing classes. Classes were conducted by an individual who attended training at the VBA Academy in Baltimore. “We have not participated in the Veterans Benefits Network Training program, but are interested in future broadcasts.”³²
- **Early Summer.** Lemon’s staff tasked the VBA Training Division staff (20T, Orlando office) to complete an evaluation of the RFW program. The Orlando staff designed an evaluation which included several evaluation teams throughout America. Each team examined a different evaluation focus and produced their report. 20T staff will compile the individual team reports into one final report.

³⁰ Stephen L. Lemons, Acting Under Secretary for Benefits, DVA Memorandum, April 15, 1997. p 1.

³¹ Director, VARO, Louisville, May 5, 1997.

³² Director, Central Area, May 7, 1997.

Training for Reader Focused Writing

The RFW training goal was to bring RFW principles and techniques to all VBA writing-- not just letters, but forms, manuals, pamphlets, circulars, memos, and all types of directives. Under Secretary Vogel said the course taught a new way of thinking about writing.³³ The overall objective of the RFW training course was to have RFW Tools provide tools and techniques to staff members to make VBA letters easier to understand and more effective.³⁴ Other course goals included: successfully merging pre-written paragraphs into a coherent, reader-focused letter; understanding the rationale behind pre-written letters that have already been revised by collaborative groups; and to learn a strategy for revising their own writing efficiently.³⁵

RFW Principles and Techniques. RFW was founded on four themes, “. . . customer focus, reader analysis, tone, and validation techniques.” According to the Participant Manual (p1-9), these themes or principles were expanded as tasks for the course:

- Think about and anticipate the reader’s needs.
 - Map a clear message.
 - Put the message up front where readers can easily find it.
- Help the reader find everything.
 - Use helpful headings.
 - Make sections easy to follow with only one topic per heading.
 - Keep sections short, using only needed details.
 - Use appropriate devices for specific emphasis.
- Help the reader see you as helpful and interested.
 - Use a conversational tone and emphatic style.
 - Write clear and concise sentences.
 - Avoid jargon.

³³ R. J. Vogel, Under Secretary of Veterans Affairs for Benefits, letter to VBA staff, Attachment, June 3, 1996.

³⁴ Ibid.

³⁵ Veterans Benefits Administration, no date. Veterans Benefits Administration Reader Focused Writing RFW Tools Course Participant Manual. p v.

- Help the reader have confidence in you.
Use correct spelling, grammar and punctuation.
Your review of completed letter.

Training Background. In early 1994, a Task Force on Simplified Communication recommended the creation of an initiative to address renewed efforts to produce better communications between veterans and VBA staffers throughout the nation. The initiative “Reader Focused Writing,” and its “Tools Course,” was designed upon the long history of VA clearer-communications efforts that emphasized the use of common sense when writing letters to veterans.

The Task Force members proposed a plan for VBA-wide communication improvement through, in part, Reader Focused Writing agency-wide training. Supporting the initiative, Under Secretary Vogel wrote that the Tools course was not simply about improving writing skills--since people had probably had plenty of those types of courses. The course would explore the sound principles of technical communication, something previous VA writing courses have not offered. He added, “It’s a new experience for most of us.”³⁶

At one time, VBA Central Office RFW training intentions nationwide were: to “train the trainers,” complete two pilots, deliver the course (in two-hour sessions two-three days each week for three weeks, for a total of seven sessions) and then have a follow-up two-hour session eight weeks later. “We plan to follow this schedule for approximately two years to reach employees at all Regional Offices.”³⁷

VBA Employee Training

RFW training was to take place throughout VBA with a four-tiered training model. Not all VBA people would take

³⁶ R. J. Vogel, Under Secretary of Veterans Affairs for Benefits, letter to VBA staff, Attachment, June 3, 1996.

³⁷ Task Force on Simplified Communication, 1995. Reader Focused Writing. Report to the Under Secretary for Benefits, August 29, 1995.

training. Those who did would be aimed at one of four training levels and the target audience would decrease with each higher tier. Each level was to increase complexity and build on skills learned at the previous level or levels.

Modules. The purpose of the lowest tier, Level One, was to orient the trainee to the philosophy and principles of Reader Focused Writing. Instead of being a separate class this module was incorporated into other departmental courses.

Level Two was the RFW Tools Course, a distance learning course for those employees whose jobs involved writing. The Level Three module would be a Collaborative Writing course, an instructor-led course designed for the five- to six-member collaborative writing team at each Regional Office, Service, and Office. These teams were to be responsible for revising letters at their own sites.³⁸ These team members were persons who prepare multi-use (pattern) letters for wide audiences. Once writing teams had been trained at each office, the Veterans Benefits Academy might periodically train new/replacement team members.

The Level Four module was about two topics, (Tier 4A) the Forms Design and (Tier 4B) Reference materials writing. Tier 4A training topics are for employees who design VBA forms. Tier 4B topics are for specialized employee-writers who draft VBA documents such as manuals, directives, handbooks, and circulars. The VBA recommended appointment of research teams to investigate proper materials design for an on-line environment. These teams were to make recommendations for Level Four forms and reference materials revision.

RFW program designers proposed to train all VBA writers according to their needs. Everyone would need a brief orientation to the principles of Reader Focused Writing. All employees who wrote as part of their jobs would need basic technical communications training. Perhaps ten percent of the writers would need advanced training in technical writing skills, collaborative writing, and usability testing. A

³⁸ Veterans Benefits Administration, no date. Veterans Benefits Administration Reader Focused Writing RFW Tools Course Participant Manual, p iii-iv.

considerably smaller number would learn how to design forms and write reference materials.³⁹

VBA-wide training sessions were broadcast live from the Washington, D.C. studio over the Veterans Broadcast Network (VBN) with on-site instructor assistance in Regional Office training rooms with trainees sitting at keypads, interactive with the broadcast staff. RFB staff members believed that the use of VBN would provide a consistent course of study to a maximum audience with minimum disruption to their work and minimal travel costs.

RO Training. Three Regional Office's trainees participated in a six day, first pilot RFB training program in April, 1996. A second pilot, at seven offices, followed which required a schedule such as the one at the St. Petersburg Regional Office: training over two weeks, June 10-13, 17-18, and 20, 1996 from 1:-4:30 PM (EDT) each day with ten trainees. A total of 64 trainees participated in the second pilot at the following stations: Roanoke (10), Baltimore (7), Hartford (7), New York (10), Seattle (10), St. Louis (10) and St. Petersburg (10). The sessions were changed from six to seven days at the end of the second pilot.

Regional Office staffs began RFB training midsummer, 1996, first in June in support of CO directed pilot trainings, and continued with the first groups of regular trainings in late summer until the RFB training stopped in November, 1996. Except for the pilot training, the course was delivered in two-hour satellite sessions on four days the first week, on three days the second. A one-hour non-satellite session followed each of the two-hour satellite sessions. There was then expected to be a follow-up two-hour session eight weeks later. This schedule was planned to be followed for approximately two years to reach all employees at all Regional Offices.⁴⁰

Initial core training contained seven class sessions, one per day. An August follow-up "refresher" session was rescheduled for September, 1996. At a few stations, an orientation session was held for supervisors. One area

³⁹ Task Force on Simplified Communications, 1995. Reader Focused Writing. Report to the Under Secretary for Benefits, August 29, 1995, pp iii-ivff.

⁴⁰ R. J. Vogel, Under Secretary of Veterans Affairs for Benefits, letter to VBA staff, Attachment, June 3, 1996.

director shared these trainee thoughts on the time required to experience RFW training:

There are seven regular sessions, plus one follow-up, in addition to an orientation and pre-evaluation session, and a post-evaluation session. The broadcasts are two hours each with an additional hour for on-site exercises (24 hours). The pre- and post- evaluations run from 1 to 2 hours each (total 26-28 hours). There is also a small, but not insignificant, time needed prior to each broadcast to allow students to get to the training room, settle, and log-on to the "One-Touch" key pad (10-15 minutes).

In addition, there is preparation time for the facilitator. There is one time preparation 15-30 minutes prior to the broadcast, and the room must be set up. There is also a small amount of post-broadcast cleaning up and sometimes faxing to be done.⁴¹

Training Course Components. Training facilities and supporting equipment include a broadcast studio in Washington, D.C.; VBA national training facilities at the VBA Training Academies in Baltimore, Maryland and Denver, Colorado; training facilities at each of the Regional Offices; and the use of a satellite system for broadcast use. The Veterans Broadcast Network (VBN) was modeled on the Federal Aviation Agency's distance education network system. The VBN leased broadcast time from FAA for VBN transmissions.

Learning Environment for Training

Facilities and Hardware. RFW trainees had an interactive video teletraining (IVT) training room that held, at minimum, one IVT monitor (27" or larger); One-Touch Keypads (one per participant); tables arranged in "V" with ample room for student materials at each workspace; chairs that rolled (or were movable) to enabled them to rearrange the chairs themselves to (1) view the monitor and (2) complete

⁴¹ Lois Mittelstaedt, 1997. Memorandum to Director, Executive Communications Staff for Eastern Area Acting Director T. M. Lastowka, May 5, 1997.

group exercises; a fax machine in, or close by, the classroom; a conference telephone; a VCR (for the Orientation session); easel, easel pads and markers; "Parking Lot" board. Student supplies included paper and pen and stick-up note pads.⁴²

Courseware. RFB training materials included an RFB Tools Course Student Workbook matched to the live broadcast scripts used by the VBN studio staff; a book of broadcast scripts and media for on-site instructor's use at the Regional Office in case of network transmission failure when the OSI would begin face-to-face instruction from the script book. Also, the studio staff used short videos at certain times during a lesson.

Personnel. During the first year, RFB training used a broadcast studio staff including several on-air instructors and technical writing experts as guest speakers; one or more on-site RFB instructors in each Regional Office training room; various support staff and the trainees. The on-site instructors, once called "Master Communicators," were to provide RFB Orientation; help with student exercises and group discussions; answer questions when possible and refer other questions to the instructor and technical experts; help students become familiar with one-touch equipment; encourage student feedback and participation; and, notify the instructor if any technical problems occurred (Someone at each station had been designated to insure that the satellite uplink was successful).

Trainee Selection. Undersecretary Vogel recommended that the Tools Course--the second of the four training levels--be delivered to all VBA employees who write letters as part of their jobs. This group included employees who wrote free-text (dictated or self-composed) letters; chose pattern paragraphs and/or form letters and sometimes inserted a small amount of text; and, reviewed or edited letters other employees wrote.⁴³ Each person selected for RFB training was to fit at least one of the above criteria. Selectees were asked to bring to class a receptive mind and a positive attitude.

⁴² St. Petersburg Regional Office. Fax to CIRCE, September, 1997.

⁴³ R. J. Vogel, Under Secretary of Veterans Affairs for Benefits, Letter to VBA staff, Attachment. June 3, 1996.

Training Schedule. An ambitious RFW Training Schedule filled the next months. (The following schedule is repeated from earlier in this report. L = live, S = Satellite.)

- **April, 1996.** RFW Pilot I course at three Regional Offices (RO).
- **June 3-14.** RFW Pilot II course at seven ROs.
- **July 29- August 2.** Central Office (CO) course I & II (Live).
- **August 5-9.** CO course III & IV (L).
- **August 12-14.** On-Site Instructor (OSI) course (Baltimore & D.C.).
- **August 19-23.** OSI course (D.C.).
- **August 26-30.** CO course V & VI (L).
- **September 9-20.** RFW I & II (Satellite).
- **September 23-27.** OSI course (Baltimore) (L).
- **September 30-October 11.** RFW III & IV (S).
- **October 15-25.** RFW V & VI (S).
- **October 28-November 8.** RFW VII & VIII (S).⁴⁴
- **Fall and Winter.** RFW training was stopped later in the year due to holiday scheduling problems and the desire to examine appropriate “next-steps” for VBA-wide RFW training.

Broadcast sessions. Training per-session timeframes included more than the broadcast period. Broadcast time length and total class time length for each broadcast were:

I	2 hrs/3 hrs;
II	2 hrs/2 hrs, 50 minutes;
III	2 hrs/2 hrs, 50 minutes;
IV	2 hours/2 hrs, 50 min;
V	2 hrs/2 hrs, 50 min;
VI	1 hr, 30 min/3 hrs;
VII	2 hrs/3 hrs;
(VIII)	intended: 4 hours/4 hours, 50 minutes. ⁴⁵

Area Director views on Trainees RFW Training Responses. Area Directors were asked in April 15, 1997 to gather and provide trainee concerns and views about RFW Training completed in each of the VBA areas (Lemons, April 15, 1997). We selected the following participant feedback (reported to the Acting Under Secretary for Benefits) for inclusion here:

⁴⁴ Melodee Mercer, Fax to CIRCE, August 29, 1997.

⁴⁵ Lois Mittelstaedt, 1997. Memorandum to Director, Executive Communications Staff from Eastern Area Acting Director T. M. Lastowka, May 5, 1997.

Broadcast (transmission): There were too many technical difficulties with the satellite transmission that took away from the class.

Call-ins. Call-ins were repetitious. Could someone else take calls and hand (the on screen instructor) a summary or screen the calls and get a few different viewpoints?

Culture change. This material would be more valuable in connection with broader training. Again, in both RO and facilitator training, the issues of “culture” was raised. If this is only a letter writing class, it is way overdone. The word “overkill” has been used. If it is part of a bigger change in the VA, then connect it to other training.

Dead time. Facilitators should have a bag full of “tricks” to make use of dead time. Warm ups, ice breakers, etc. would be helpful. In any event we need lots of questions to stimulate discussion and keep people focused.

Evaluations. The daily forms are not valuable. They ask the wrong questions from customer’s viewpoint and not enough questions and no comments are invited. The course and evaluations didn’t really hit it right either. There is way too much to remember over two weeks time.

Expert speakers. Experts were of limited value-- anyone could read off a TelePrompTer. Put them to work. They don’t seem to be tied to the monitor, so let them move around. Also, answering the question on the last day was a good use of the expert. Otherwise, we don’t see any point in having them there.

Facilitators. Your on-site facilitators can either make or break the program. They can take lemons (such as technical problems) and turn them into lemonade, or they can take a group of interested students and turn them off. The facilitators on this site were badly short-changed. They apparently had little or no experience as facilitators. Facilitation is not the same thing as teaching; it takes different skills. The facilitators are really an extension of the instructor, her eyes, and ears. They need to be tuned in to the humans in the room.

Feedback. We did not have an opportunity to give any verbal feedback except for Day 4 when we skipped an exercise to do “What’s good? What needs improvement?” This needs to be done daily. You lost a great deal of valuable feedback because we weren't asked.

Forms. We redesigned our application for benefits, the VA Form 22-1990, using RFW principles, and we’re working on two others.

Letters. PCGL letters should be modified. Currently, PCGL letters look like RFW, but they do not necessarily sound like RFW.

Manual, RFW Tools training course. Thorough. Someone put a lot of time and thought into this.

Manuals and Circulars. We’ve rewritten some manual changes and circulars using RFW principles. The response from employees has been very positive.

One-Touch. Using the “One Touch” system allowed prompt analysis of feedback during the satellite broadcasts, but waiting time for “One Touch” results caused students to lose interest in many cases.

Pamphlets. We’re beginning a rewrite of our informational pamphlets based on feedback we received from recent focus groups with veterans.

Partner site. Partner site provided little added value for the amount of time expended. People seemed uncomfortable and phone connections were not good. If you’re going to do this, maybe it could be personalized. On the first day have each student write his/her name and position and a shorty message to the partner site. We couldn’t be talking into space.

Principles (RFW). Participants who use RFW principles report a greater response rate to development letters, as explaining the need for specific information encourages the claimant to reply . . . RFW principles applied by the Congressional and case manager Veterans Benefits Counselors (VBCs) are valuable for standardized

paragraphs and original writing in Congressional letters ... The updated templates to the PCGL system reflect RFW principles and are understood more easily by our customers. Bullet items and headings contribute to clarity in expressing regulatory principles related to the benefits. It is suggested that Central Office completely revise the PCGL system using the RFW techniques.

Role Perspective: One Rating Specialist. . . . now uses Plain English in his rating decisions so the claimant as well as VA employees understand the decision more clearly. Anecdotal evidence indicates the rating specialist receives fewer inquiries from co-workers and VA receives fewer inquiries on the rating decisions because of the use of Plain English and RFW techniques.

Scheduling. The amount of VBN classes available to Portland RO is limited due to the difference in time zones between the broadcast site and the receiving site. Eastern VA facilities can participate in two broadcasts each day (“morning” and “afternoon” sessions) while western facilities can participate in only one (“afternoon”) session which starts midmorning, Pacific time. This allows some facilities to train twice as many employees in the same time frame as others.

Session (8th) (follow-up). A four hour follow-up broadcast for students who attended the Tools course would be welcome. It would help to reinforce RFW and also provide a format for discussing questions and issues that may have arisen since RFW was implemented (Mittelstaedt, 1997, Enclosure 1) Another trainee: Participants agreed on the importance of achieving change in our organizational culture to improve the way we write, but felt the course was too long and were not enthusiastic about receiving an additional 4-hour module of training.

Tape (Broadcast). Provide a tape, if broadcast doesn’t work, PLAY IT!! It’s not ideal, but at least people wouldn’t have to endure silence and lost time. It could also be a reference or refresher for the future.

Technical. Gotta make it work. Nothing is more exasperating than watching someone’s lips move and not

being able to hear what is said on call-ins or conference calls.

Time use. There is great concern among employees about the amount of time spent away from their desks. While training may be “written off” for report purposes, that doesn’t help move cases or contribute to timeliness. We know that writing better letters will ultimately result in less rework and better quality, but this is admittedly a slow process and there is anxiety in the short term.

Video-conferencing equipment. It is available for use in concert with satellite training equipment for RFW training.

Web Page. We’ve done several write-ups for our Web Page using RFW. The Internet is a particularly adaptable medium for RFW. Much of what is found on-line follows the same technical writing principles as RFW.

One trainee commented, “Twenty nine stations have received the training via satellite; however, that means twenty nine have NOT received the course.” Encouragement for the continuation of this training program came from many quarters, both where training had and had not occurred. Even though only a few of the total VBA employees had been trained, there was much positive persuasion to be found wherever the RFW initiative was discussed. One sense of the quality of this training was the fact that there was general agreement by many that this training package was worthwhile and there was no large group of detractors. One writer said, “There is good material here that we would all like to see used well, in a way that will best contribute to the goals of the Agency, service to our customers, and greater efficiency for our employees . . . We like the training; it’s good stuff.” Another writer said, “Only about 30% of our staffers were able to take the Tools Course training given during this past summer (1996). So we hope that the tools course will continue. The rest of the service needs the benefit of this training.”

What was left to be done? Trainees called for the continuation of the RFW Tools Course training. Yet before the full VBA-wide training could occur, the regulations level training had to be developed. One writer spoke on the need

for regulations change in order for RFW to impact all of the VBA communication cycle.

I fully support the PEN effort to bring about regulations on so much that we write (our manuals, letters, pamphlets, and forms), probably in no area will RFW have more significant long-term impact. Yet this is probably also our biggest challenge. To succeed in VA as well as in most agencies, we'll need strong support (even in the form of a decree) from General Counsel.

All the evaluation comments in the four plus pages above came from the Area Directors Report to the Acting Under Secretary for Benefits.

