



# Meeting the Needs of California Veterans: A Marketing and Outreach Plan for the California Department of Veteran Affairs

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## 1.0 Executive Summary

This marketing plan for the California Department of Veteran Affairs (CalVet) has been created in order to assist CalVet in improving their outreach to the nearly 1.8 million veterans<sup>1</sup> residing in California. As a non-revenue generating governmental agency, CalVet is by definition resource constrained, but there are a number of concrete steps that CalVet can take to improve its outreach and marketing efforts to California veterans. After evaluating California veterans, CalVet, and CalVet's peers, a marketing strategy was developed with the goal of achieving these objectives from CalVet's Strategic Plan:

- 5% annual increase in total number of veterans in the CalVet database
- 5% annual increase in claims submitted by CalVet and CVSOs<sup>2</sup>
- 5% annual increase in dollars received through claims submitted by CalVet and CVSOs

The marketing strategy is a two pronged strategy designed to reach the 50% of veterans that CalVet does not have information on while improving the process of communication and outreach to the 50% of veterans CalVet does have information on. There are five main recommendations that support this strategy:

- Positioning: Refine CalVet's message to more consistently communicate the mission statement across all facets of the organization
- Social Media: Leverage social media to cross-message, educate, and interact in two-way communication with the veteran
- Organizational Change:
  - Create a Deputy Secretary-level position that is focused solely on communications and marketing
  - Create a single database that is managed by one division but accessed independently by all divisions and focused on customer relationship management
- CVSOs: CalVet should commit to improving their existing relationship with CVSOs, standardize their communication process with them, consider setting performance-metrics based upon demographic county veteran population data, and use incentives to reward high-performing CVSOs
- Partnership and Outreach: Create a formal system for interaction with major Veterans Service Organizations (VSOs) on a monthly basis, encourage VSOs to disseminate information to the ground level employees, explore the benefits of a VSO training system through the existing CVSO training model, enhance social media marketing and engage younger VSOs

## 2.0 Market Analysis

CalVet is at a crucial juncture in the establishment of their identity and role within the veteran landscape: it is an organization that prides itself upon improving the quality of life for all California veterans and their dependents. Recent developments include the launch of a personalized and user-friendly website in addition to proactive steps to reduce the federal benefit

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<sup>1</sup> USDVA Veteran Population Projection Model 2011 (VetPop 2011)

<sup>2</sup> Taken 'as is' from the CalVet Strategic Plan, CVSO stands for County Veterans Service Office (or Officer)

claims backlog. Historically CalVet has placed emphasis upon its Veterans Homes and Farm and Home Loan program, however, CalVet is re-defining how they serve and market to veterans as they attempt to overcome several internal and external barriers that impede their progress. In comparison with other veteran organizations, CalVet has accumulated social capital with a large state-wide infrastructure, and should take advantage of this network to position themselves as leaders in veteran engagement. In assessing the market we did not focus on which benefits should or should not be available or which organizations should be involved in benefits delivery. We focused on analyzing the changing demographics of veterans in the California as well their needs and challenges. We also looked at the challenges and opportunities within CalVet in marketing services to veterans. Finally, we looked for best practices among peer organizations as well as opportunities to partner with veteran service organizations.

## 2.1 Veterans

Although the overall California veteran population is declining and aging, its population is changing in important ways: Gulf War Era veterans are seeing their ranks grow at a high percentage, as well as diversifying with women veterans and Hispanic/Latino veterans increasing over the next 10 years. Younger veterans are returning home with special needs, as found in higher rates of mental health issues and risk for homelessness. Employment has been identified as a critical need, particularly for young veterans, with many experiencing higher rates of unemployment and job instability in comparison to their civilian peers. Other state's department of veteran affairs (or equivalent) have found systematic ways to address these changing needs, creating workforce taskforces, mental health action plans, and strategic goals and objectives to reduce homelessness among veterans.

### 2.1.1 Veteran Demographics

#### Veterans in California

In 2012, approximately 6.9 percent of the civilian population 18 years and older (1,857,748)<sup>3</sup> in California were veterans. With recent conflicts in Iraq and Afghanistan coming to a close, it has been estimated that approximately 30,000 troops are leaving service and returning to California each year.<sup>4</sup> These younger veterans will join an older, aging population of veterans from the Vietnam War, Korean Conflict, and earlier Gulf War Era.

#### California Veteran Population Trends

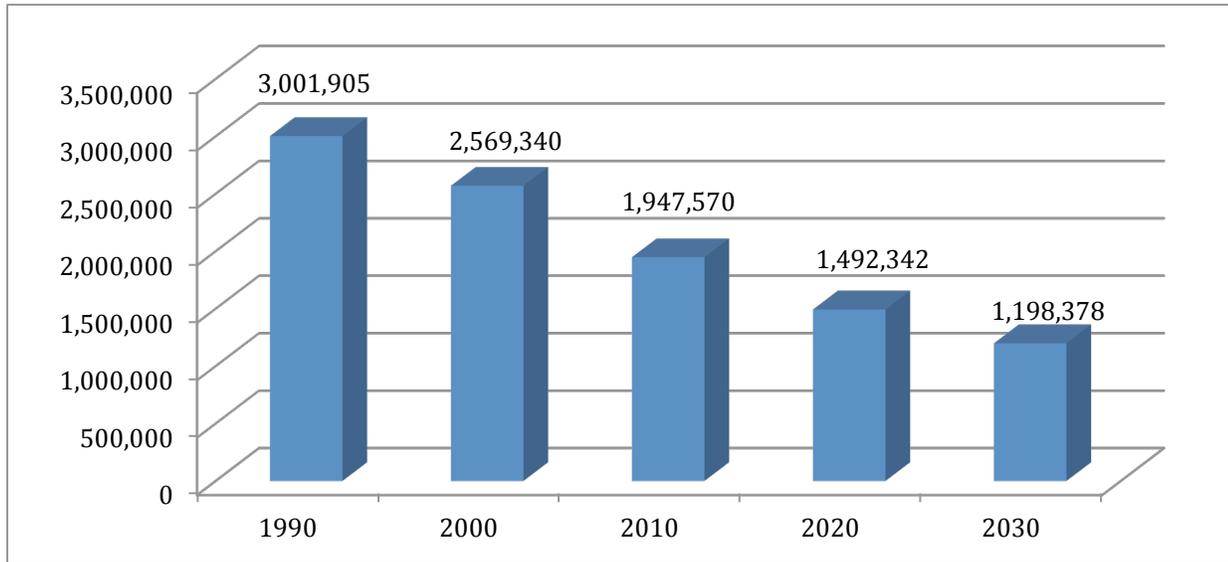
Figure 1 represents the number of veterans in California and the percentage of veterans in the population from 1990 to 2030. The number of California veterans has decreased each decade due in part to the mortality of older veterans, with future projections replicating this finding.

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<sup>3</sup> American Community Survey. (2012). U.S. Census Bureau.

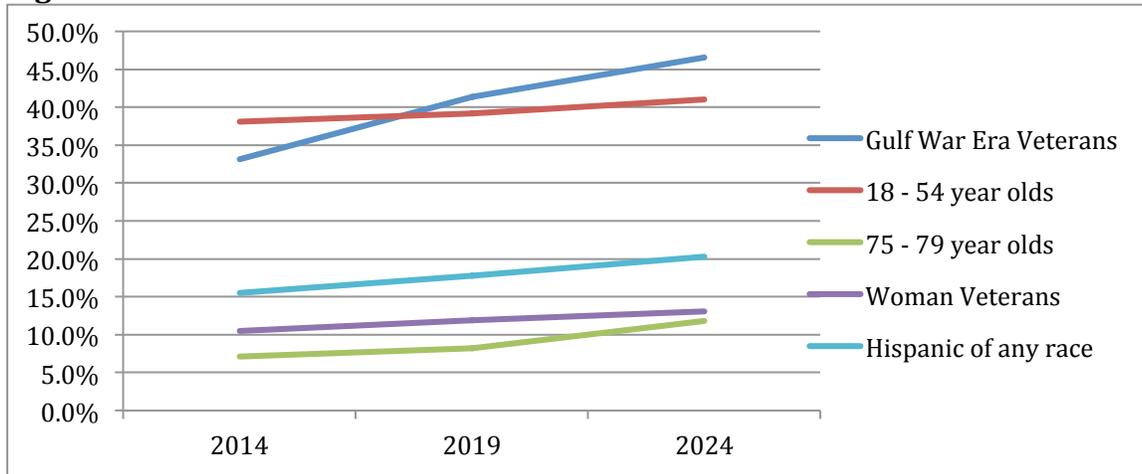
<sup>4</sup> CalVet. Veteran Services and Benefits. <https://www.calvet.ca.gov/veteran-services-benefits>

**Figure 1: Number of California Veterans, 1990 - 2030<sup>5</sup>**



While the overall California veteran population is declining over the next 10 years, there are several veteran subgroups whose ranks are consistently increasing over this same period. Gulf War Era veterans have the largest projected growth, with a 13.5 percent increase from 2014 to 2024, with the greatest gains found over the next five years (8.3 percent). Hispanics of any race have a rate increase of almost 5 percent over the next 10 years, while women veterans are expected to steadily increase each year into 2030. Lastly, 18 – 54 year olds are seeing a modest percentage increase at almost 3 percent over the 10 year period, which stands in contrast to the 55 and older population, which is declining by 3 percent over this same period (except for 75-79 year olds who have consistent increases into 2024).

**Figure 2: California Veteran Market Growth**



<sup>5</sup> 1990 and 2000 data are from the Census and 2010 data is from the American Community Survey summary data. 1990 represents the veteran population that is 16 and older, while 2000 - 2030 is 18 and older. 2020 - 2030 are projections from USDVA VetPop2011

## Demographic Characteristics of California Veteran Population

In California, a greater percentage of veterans were non-Hispanic whites (67.2 percent) compared to non-veterans (41.4 percent). The next largest population was Hispanics of any race, comprising 14.8 percent of the California veteran population. Also, a greater percentage of California veterans were Black or African American (9.1 percent) compared to non-veterans (5.7 percent).

**Table 1: Race / Ethnicity of California veterans and non-veterans, 2012<sup>6</sup>**

Race/Ethnicity	Veterans		Non-Veterans (18 and older)	
	Numbers	Percent	Numbers	Percent
White Non-Hispanic	1,240,131	67.2%	11,017,089	41.10%
Hispanic of Any Race	272,454	14.8%	9,408,755	35.10%
Black Non-Hispanic	168,402	9.1%	1,527,917	5.70%
Asian Non-Hispanic	95,847	5.2%	3,913,613	14.60%
Other or Multiple Race Non-Hispanic	46,714	2.5%	696,944	2.60%
American Indian Non-Hispanic	14,151	0.8%	160,833	0.60%
Pacific Islander Non-Hispanic	7,103	0.4%	107,222	0.40%
Total	1,844,802	100%	26,832,373	100%

In 2013, approximately 88.7 percent of California veterans were men compared to 11.3 percent of California female veterans. However, when period of service is considered, the female veteran population has grown considerably, with Gulf War Era female veterans (101,891 total) surpassing female veterans from World War II, Korean Conflict, Vietnam Era, and Peacetime combined (82,883 total).

**Table 2: Percentage of Male and Female California Veterans by Period of Service, 2013<sup>7</sup>**

Period of Service	Male		Female		Total
	Numbers	Percent	Numbers	Percent	Numbers
Gulf War	465,804	82.1%	101,891	17.9%	567,695
Vietnam Era	527,827	96.1%	21,632	3.9%	549,459
Korean Conflict	135,675	96.9%	4,285	3.1%	139,960
World War II	92,309	92.4%	7,555	7.6%	99,864
Peacetime Veterans	389,066	88.7%	49,411	11.3%	438,477
Total	1,610,681	89.7%	184,774	10.3%	1,795,455

<sup>6</sup> Veteran data is from VetPop 2011; Non-Veteran data is from American Community Survey, 2012.

<sup>7</sup> Source: Data from VetPop 2011

California veteran and non-veteran populations differ according to education level – on the whole, California veterans were more educated than their non-veteran counterparts. In particular, Table 3 illustrates that a greater percentage of non-veterans 25 and older had less than a high school diploma compared to veterans in 2012. Also, almost half of California veterans 25 and older had some college or associate’s degree in comparison to less than a third of California non-veterans.

**Table 3: Percentages of California Veterans and Non-Veterans 25 and Older by Education Level, 2012<sup>8</sup>**

Educational Attainment	Veterans	Non-Veterans
Less than high school graduate	5.5%	19.6%
High school graduate (includes equivalency)	20.9%	20.6%
Some college or associate’s degree	42.6%	28.9%
Bachelor’s degree or higher	31.0%	30.9%
Civilian population 25 years and over	1,826,578	22,876,799

In comparison to the U.S. veteran population, California veterans tend to be younger in the 18 – 34 age range, with miniscule differences in the other age groups (Table 4). In each category, California veterans represent an older and aging population in contrast to California non-veterans, with large disparities found in the 65 to 74 and 75 years and over age group. An analysis of service period partially explains the age differences between veterans and nonveterans. Figure 2 shows 44 percent of the veterans in California served during Vietnam, Korean Conflict, and World War II eras. However, it is interesting to note that the Gulf War Era (31.6 percent), as recently as 2013, now exceeds the Vietnam Era in terms of population (30.6 percent)

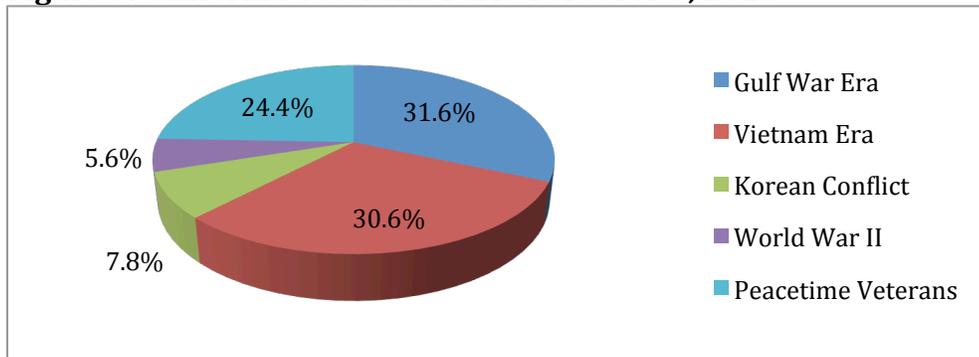
**Table 4: Percentages of California Veterans and Non-Veterans by Age, 2012<sup>9</sup>**

Age Categories	CA Veterans	National Veterans	CA Non-Veterans
18 to 34 years	10.9%	8.9%	34.3%
35 to 54 years	26.7%	27.8%	37.2%
55 to 64 years	19.8%	20.3%	14.6%
65 to 74 years	21.3%	22.3%	7.9%
75 years and over	21.3%	20.8%	6.0%
Total	1,844,803	22,328,279	26,805,571

<sup>8</sup> American Community Survey, 2012, Summary Tables

<sup>9</sup> Source: Veteran data from VetPop 2011; Non-Veteran data from ACS 2012, Summary Tables

**Figure 3: California Veteran's Period of Service, 2013<sup>10</sup>**



### 2.1.2 Veteran Needs

California veteran needs differ across segments. Generally, younger California veterans (ages 25 – 34) have higher unemployment and lower labor pool participation rates than their civilian counterparts,<sup>11</sup> while older and aging veterans seek appropriate long-term care services. California veterans have reported higher rates of disability (26.6 percent) as compared to non-veterans (13 percent), with 16 percent of California veterans with a service-connected disability rating.<sup>12</sup> National projections indicate that while the veteran population is declining, the number of veterans with service-connected disabilities has been on the rise with a 60% increase since 1990.<sup>13</sup> Gulf War Era veterans outpace any other service period in terms of most veterans who receive service-connected disability benefits.<sup>14</sup>

Veterans are more susceptible to hearing impairment, vision loss, orthopedic injuries, traumatic brain injuries, burns, spinal cord injuries, and amputation as compared to civilians,<sup>15</sup> and have struggled with higher rates of mental illness such as depression and Post-Traumatic Stress Disorder.<sup>16</sup> Most women veterans, in particular, have experienced some sort of trauma with 37 percent reporting military sexual trauma.<sup>17</sup>

As mentioned earlier, veterans tend to be better educated than their civilian counterparts and California leads the way in terms of most beneficiaries who have received federal education benefits. Housing is an area of need with both men and women veterans over-represented in the

<sup>10</sup> Source: Data from VetPop 2011

<sup>11</sup> Bureau of Labor Statistics, [www.bls.gov](http://www.bls.gov)

<sup>12</sup> American Community Survey, 1 year estimate, 2012.

[http://factfinder2.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ACS\\_12\\_1YR\\_B21100&prodType=table](http://factfinder2.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ACS_12_1YR_B21100&prodType=table)

<sup>13</sup> U.S. Department of Veterans Affairs. National Center for Veteran Analysis and Statistics. February 2014. Accessed at [http://www.va.gov/VETDATA/docs/Quickfacts/SCD\\_trends\\_FINAL\\_2012.pdf](http://www.va.gov/VETDATA/docs/Quickfacts/SCD_trends_FINAL_2012.pdf)

<sup>14</sup> U.S. Department of Veterans Affairs. Annual Benefits Report, FY 2012. Accessed at [http://www.vba.va.gov/REPORTS/abr/2012\\_abr.pdf](http://www.vba.va.gov/REPORTS/abr/2012_abr.pdf)

<sup>15</sup> U.S. Department of Veterans Affairs. (2009). "Putting Poly-trauma Care „On the Map.“" Veterans Health Administration, Research and Development.

<http://www.research.va.gov/news/features/polytrauma.cfm#.USvq7DdZMop>

<sup>16</sup> Kessler RC, Heeringa SG, Stein MB, et al. Thirty-Day Prevalence of DSM-IV Mental Disorders Among Nondeployed Soldiers in the US Army: Results from the Army Study to Assess Risk and Resilience in Servicemembers (Army STARRS). *JAMA Psychiatry*. 2014;():.doi:10.1001/jamapsychiatry.2014.28.

<sup>17</sup> California Research Bureau. California's Women Veterans and Homelessness. S-12-011, December 2012.

homeless population. Poverty has been cited as a risk factor: male veterans who live in poverty are 1.2 times more likely to become homeless, woman veterans are 2.7 times more likely, and 18 – 30 year olds are 3.4 times more likely.<sup>18</sup>

### 2.1.3 CalVet Perception and Challenges

*“Other than Veterans Homes and Home Loan program, mystery what they do beyond that”<sup>19</sup>*

The face of the CalVet customer<sup>20</sup> is changing – veterans and families of veterans are no longer the homogenous group that they once were, with a wider range of complex needs and motivations that prompt their interaction with the government.

Over the course of our research, several common themes permeated our findings with regard to California veterans’ perception of CalVet. We relied upon qualitative interviews and research, as well as existing veteran surveys at the state and federal level (when those surveys included California specific information) to generate conclusions.

First, California veterans and their families simply do not know what CalVet does or who they are. Historically, CalVet has been organized and structured around its Veterans Homes and Farm and Home Loan program, with less attention and funding devoted to increasing awareness amongst veterans about the benefits and services available to them. While these priorities have been re-framed over the last five years, CalVet provides few direct services, but rather, functions as a coordinator within a larger service delivery network that is comprised of county, state, federal, and non-profit organizations and agencies.

Instead, CalVet depends upon the 56 County Veteran Service Officers (CVSOs) to engage and outreach with California veterans, however, the connection and relationship between CVSOs and CalVet may be lost or misunderstood by veterans. Further, CalVet’s two primary programs, Veterans Homes and Farm and Home Loan program, may not be accessed by a veteran until later in their life – 55 and older for Veterans Homes, while the home loan program will be dependent upon a veteran having a certain level of financial resources, job stability, and credit history. As 30,000 or so younger veterans return each year to California, CalVet may be missing out on opportunities to define their identity, particularly among this demographic.

Secondly, California veterans do not distinguish federal benefits and services from state benefits and services. For example, even though a veteran may know of the Veterans Homes program, they may perceive that to be a federal benefit. This may be attributed to the increasingly complex and fragmented benefit delivery system that exists, but it also may relate to CalVet not effectively differentiating themselves from the federal U.S. Department of Veteran Affairs (USDVA) system. One study found that over 50% of women veterans in California are unfamiliar with 11 of the 13 state benefits, while approximately 80% of women veterans are familiar with all 7 of the VA

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<sup>18</sup> California Research Bureau. Overview of Veterans in California. March 20, 2013. Testimony before the Joint Hearing of the Assembly Committee on Veterans Affairs and the Assembly Committee on Housing and Community Development

<sup>19</sup> County Veteran Service Officer, Personal Interview. February 2014

<sup>20</sup> In this instance and in certain others throughout the report we have chosen to replace ‘veteran’ with ‘customer’ to imply the notion of service to the customer

benefits.<sup>21</sup> The two state benefits that a majority of women veterans were most familiar with were Veterans Homes and the Farm and Home Loan program.

Lastly, California veterans are unsure of their eligibility or do not feel that they are eligible for services and benefits. The 2011 CalVet Needs Assessment survey indicated that the most common reason why veterans didn't receive federal benefits was because they did not feel that they were eligible for such services. This may be indicative of a larger perception problem of veterans and their identity, particularly women veterans, as well as a lurking gap in information delivery upon a service member's discharge from the military. Research indicates that the timing of Transition Assistance Programs (TAPs) may be problematic as it is offered upon discharge from the armed forces, more often resembling a 'box to check' than an informative and effective tool that aids veterans in resource-utilization and benefit access.<sup>22</sup> In light of this, it is even more important that CalVet consider alternative forms of interaction and access points across a veteran's network, such as engagement via social media.

## 2.2 Organization

The following section provides an assessment of the internal and external factors that influence CalVet's ability to meet its marketing objectives. Here we consider the characteristics that give CalVet both an advantage and a disadvantage relative to others as well as opportunities for CalVet to exploit its strengths. Elements that might interfere in CalVet's ability to achieve its mission are also considered.

### 2.2.1 Strengths

- Strategic Plan provides a clear mission and vision along with strategic goals
- CalVet possesses a large state-wide infrastructure to engage with the veteran community
- The CalVet Farm and Home Loan program offers competitive market rates
- CalVet has led a joint USDVA "Strike Team" resulting in large decreases in the benefit claims backlog
- New website that includes a portal to collect veteran information and deliver a personalized veteran experience
- CalVet has demonstrated a willingness to make necessary changes and improvements to the organization

### 2.2.2 Weaknesses

- Lack of coordination among CalVet divisions, chiefly Communications & Legislative Affairs and Veteran Services, and unclear roles with respect to marketing/outreach
- Gap in skills and resources for digital content generation
- Multiple databases used in collecting veteran information, with lack of standardization and inconsistent use
- Conflicting and inconsistent communications: external stakeholders confused or unaware of CalVet's role

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<sup>21</sup> California Research Bureau. California's Women Veterans Benefit Utilization: Patterns and Identified Needs. *Women Veterans Survey*. October 2012.

<sup>22</sup> Center for a New American Society. Needs Assessment: Veterans in the Western United States. December 2013. Accessed at [http://www.cnas.org/sites/default/files/publications-pdf/CNAS\\_NeedsAssessment\\_CarterKidder.pdf](http://www.cnas.org/sites/default/files/publications-pdf/CNAS_NeedsAssessment_CarterKidder.pdf).

- Veteran Services' limited coordination with the CVSOs, due in part to the fact that the CVSOs are under the direct control of their respective county board of supervisors, hinders its ability to increase the number of veterans receiving benefits
- Veteran Services lack formal agreements with CVSOs that identify how funds are being allocated
- Department does not require the CVSOs to provide Veteran Services with information of their outreach activities. Without this information, Veteran Services is limited in its ability to identify potential opportunities for engagement and areas where it could better coordinate with the CVSOs<sup>23</sup>
- CalVet does not have reliable contact information, including accurate email addresses, for the 1.8 million veterans residing in California

### 2.2.3 Opportunities

- Better interagency collaboration by defining marketing roles and responsibilities and improvements in structure and information flow
- Younger veterans are more amenable to connecting with veterans of their own generation
- Great opportunity to learn more about California veterans and inform veterans about CalVet through marketing and communications strategies
- Improved relationship with VSOs to utilize their resources and network by formalizing a process to keep them aware and engaged

### 2.2.4 Threats

- Veterans are weary of engaging with the government, especially at a younger age
- Political environment is often difficult to navigate and could be a barrier to quick change
- If the relationship with either party is not managed properly, territorial issues could emerge between CVSOs and VSOs

### 2.2.5 Current Organizational Structure

CalVet currently operates two divisions that overlap in terms of marketing efforts: Communications & Legislative Affairs and Veteran Services.

#### *Communications & Legislative Affairs*

The Communications and Legislative division has two core responsibilities, 1) external affairs and communications and 2) legislative affairs and government relations. Communications & Legislative Affairs marketing efforts focus mainly on responding to media questions (often in response to public records requests), production of certain marketing materials (e.g., brochures, veteran resource book, fliers, posters, etc.), direct outreach via two listservs<sup>24</sup> (i.e., media and stakeholder/partner lists), statewide news releases, and ground marketing via conferences, job fairs, state fairs, and other events.

Within Communications there are four PIOs for each programmatic division, Farm and Home Loans, Veterans Homes, Veteran Services, and Special Projects for the Secretary. Each PIO is responsible for managing the operations, content generation, and marketing for their respective

<sup>23</sup> <http://www.bsa.ca.gov/pdfs/reports/2009-108.pdf>

<sup>24</sup> An electronic mailing list

program area. Within Veterans Homes, there are three PIOs that are located in the Veterans Homes and are supervised by the administrator of each of the homes. The Legislative division has one staffer, the Legislative Consultant. The Department also has a graphic designer and an office technician.

### *Veteran Services*

Veteran Services is responsible for helping veterans receive the benefits and services they are entitled to through their analysts and state-wide network of Local Interagency Network Coordinators (LINC)s and County Veteran Service Officers (CVSOs). Veteran Services marketing efforts involve direct engagement with the California veteran community through in person veteran contact, CVSO training, and outreach via a veteran database. Veteran Services Headquarters employs seven analysts whose marketing related responsibilities include: veteran referral services via the public counter and phone, providing direct outreach to the Disabled Veterans Business Enterprise program for the Department of General Services, conducting outreach to incarcerated veterans, providing training to CVSOs, administering the Prop 63 Mental Health Grant Program for CVSOs, Veteran Treatment Courts contract, and Stand Down Grant Program. Headquarters staff also oversees the Veteran Services division listserv and website content.

LINC)s are the Veteran Services regional outreach units and serve as an informational conduit to the veteran community and feedback resources for CalVet. Each LINC is assigned to one of eight California regions where they advocate for veterans and bridge the gap between CalVet and the federal, state, county, and non-governmental agencies that serve veterans. They are responsible for contacting and assisting veterans to ensure they receive the benefits and services for which they are eligible. Veteran Services also manages 18 district office employees that review incoming claims from counties and provide appeals representation for claims with the CalVet Power of Attorney. Veteran Services provides burial and cemetery services in Northern California, Yountville, and Central Coast, for veterans, and their spouses and eligible dependents. Veteran Services provides some funding and oversight over the state's 56 CVSOs who are direct veteran advocates that serve veterans at the local level. CVSOs receive the bulk of their funding from their home counties and only limited funding from CalVet which limits the degree to which CalVet can direct CVSOs efforts or hold them accountable for their performance. Nonetheless, CalVet oversees CVSOs via VetPro, the department's claims management program which audits claims, enabling the state and counties to produce claims, and data analysis.<sup>25</sup>

### **2.2.6 Core Service Offering**

CalVet's main objective is to deliver the benefits and services veterans and their families need to be successful, productive Californians. The agency provides four core services: Veterans Homes, CalVet Farm and Home Loan Program, Veteran Services, and Advocacy.

### *Veterans Homes*

CalVet's Veterans Homes division has a goal to provide the California's aged and disabled veterans with rehabilitative, residential medical care and services in a homelike environment for all veterans residing in the state's eight active veterans homes located in Yountville, Barstow, Chula

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<sup>25</sup> <http://www.lhc.ca.gov/studies/217/Report217.pdf>

Vista, Ventura, Lancaster West Los Angeles, Fresno and Redding. The Veterans Homes program receives 80% of CalVet's staff and operations budget<sup>26</sup> with more than 1,700 veterans currently residing in these homes. The system of live-in, residential care facilities offer a comprehensive plan of medical, dental, pharmacy, rehabilitation services and social activities within a homelike, small community environment. Veterans who are age 55 and above and discharged from active military service under honorable conditions are eligible to apply for admission. The age requirement is waived for disabled or homeless veterans needing long-term care. The Homes range in size from 60 residents on a 20-acre site to over 1,000 residents on 500 acres. These Homes in aggregate can house and care for approximately 3,000 veterans.

#### *CalVet Farm and Home Loan Program*

CalVet's Farm and Home Loan program provides competitive financing options to help veterans meet their home financing needs. CalVet offers loans on houses, condominiums, duplexes, farms, mobile homes in rental parks, and manufactured homes on permanently affixed land. Loans are also available for construction, rehabilitation, and home improvement. The program operates as a full-service lender, providing loan funds and servicing the loan. Loans are funded through tax-exempt bonds that are serviced using the mortgage payments of veteran customers. These loans are available to any veteran interested in purchasing a home in California and offers competitive, below market interest rates with low or no down payment.

#### *Veteran Services*

Veteran Services is responsible for educating and outreaching to veterans regarding their benefits. Veteran Services administers a number of special programs, benefits and services for California veterans and their families, including: education, employment, healthcare, housing, VA claims, and advocacy/assistance. Veteran Services staff are trained to help veterans and their families obtain benefits by providing counseling and referral services to deliver accurate and current information on the range of issues associated with veteran's benefits and entitlements. The department is responsible for collaborating with the different agencies that provide services to veterans.<sup>27</sup>

#### *Advocacy*

CalVet's Communications and Legislation Unit, as the public relations arm of CalVet, is responsible for public information, public and media inquiries, and legislation impacting veterans in the state. The agency also advocates for veteran housing and homeless prevention through outreach, state-wide collaborative, partnerships, advocacy, and services, and working in conjunction with various State and local agencies throughout California to assist veterans' transition from active duty status. CalVet also provides advocacy, information and support to female veterans and also works to provide equitable access of services to minority veterans.

### **2.3 Peers**

Considering the shared interest of all 50 states when it comes to serving veterans, it is important for CalVet to be cognizant of the efforts of other state veteran affairs departments. In our research, we focused on two other states that are comparable to California in terms of veteran population

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<sup>26</sup> Little Hoover, <http://www.lhc.ca.gov/studies/217/Report217.pdf>

<sup>27</sup> California State Auditor Report 2009-108, October 2009

and size: New York and Florida. We looked for differentiation between states: marketing efforts, interaction with VSOs, and relationship with CVSOs. Below are two case studies that illustrate both best practices and lessons learned in the states of New York and Florida. Florida's efforts at veteran outreach and VSO interaction have been very successful due to a strong structure and organizational objectives. New York State Veteran Affairs Department has faced many similar challenges to CalVet, and has some important lessons that CalVet can learn from

### 2.3.1 New York Case Study

In the New York State Veteran Affairs Department, there was no reported formal system for consistent VSO interaction. Until a younger employee was hired into the state department, there was little-to-no contact with younger VSOs. Although VSOs and the New York State Veteran Affairs Department both see potential for a partnership, no steps are being taken to move forward. This lack of a formal system has led to territorial issues between VSOs and CVSOs, such as when the American Legion and CVSOs reported issues a few years ago with conflicting efforts to bring veterans into their offices.

Notable Quotes:

- “It’s sad to see two groups with the same end goal to come into conflict” ~ Official at a significant VSO in New York, formerly in California
- “The best way to reach the ground-level employees would be dissemination by employees at the middle or lower tiers of an organization” ~ IAVA

### 2.3.2 Florida Case Study

The Florida Department of Veteran Affairs (FDVA) is a Cabinet-level department, which is small compared to CalVet. Florida’s lack of a state sales tax means that they spend little on government, despite having a large pool of Vietnam-era veterans, which comprise one third of the vets in Florida, 225,000 Iraq and Afghanistan Veterans, and a large number of 65 and over veterans.

FDVA initially lacked a formal structure and system of supporting veterans, which led to a need for a marketing plan in 2012. A public relations firm was contracted for purposes of outreach and branding.

One outcome of the campaign was the launch of a mobile app on iOS and Android in September 2012. Also included was a new website, logo, mission and vision to rebrand the organization into having a theme of advocacy. Below are the changed statements:

- New Mission: To advocate with purpose and passion for Florida veterans and link them to superior services, benefits and support.
- New Vision: FDVA is the premier point of entry for Florida veterans to access earned services, benefits and support

In order to publicize FDVA, 5 public service announcements (PSAs) were released to increase traditional media’s role in reaching older veterans. FDVA’s efforts earned them the award of Best Florida Public Relations Campaign in 2012.

FDVA also used a structure called the “RPIE Marketing Framework: Research, Planning, Implementation, & Evaluation.” This consisted of the following:

- **Research:** Used census-based research and figures in conjunction with surveys and anecdotal evidence to establish knowledge about the veteran population
- **Planning:** Created an approach that would appeal to its target populations. Largest differences emerged between older and younger veterans. Younger veterans are “distrustful and hesitant” when it comes to interacting with the government, and older veterans are “difficult to access with new and inexpensive forms of media”
- **Implementation:** Executed the actions of the plan
- **Evaluation:** Set and utilized metrics to gauge the success of the ventures. Metrics include: number of unique veterans served, uptake and enrollment in VA healthcare in Florida, Facebook likes, website hits, time per page, and number of hits on the mobile app

Next, Florida set several successful practices for VSO interaction. There is a confederation of VSOs, Florida Veteran’s Council, which is comprised of all VSO senior leadership. The council meets on a monthly basis to discuss common veteran issues and how they’re working on them, with FDVA participation in these meetings. Additionally, there is a county in Florida where there is no CVSO, but instead a local VSO has been contracted to fulfill the same needs and provide veterans with claims assistance.

- Mission of Florida Veteran’s Council: “A coalition of nationally chartered VSOs... to communicate and interact with the Florida Department of Veteran Affairs”

### 3.0 Marketing Strategy

CalVet’s mission is to serve California’s veterans and their families while the vision is to be the state’s leading advocate and resource so veterans can achieve the highest quality of life.<sup>28</sup> In order to fulfill the promise of the mission and vision statement, CalVet must improve the process of communication and outreach to the veterans it has information on while improving awareness and outreach to the veterans it does not have information on. Since CalVet currently has information in their database for roughly half of all veterans in California,<sup>29</sup> both population groups take on equal importance. Therefore, the marketing strategy is a two pronged strategy designed to reach the 50% of veterans that CalVet doesn’t have information on while improving the process of communication and outreach to the 50% of veterans CalVet does have information on. All of the recommendations support one or both facets of the strategy. This strategy is also consistent with the objectives for ‘Veterans Outreach and Services’ in CalVet’s Strategic Plan:

- Expand and improve the methods for identifying and contacting veterans and their families
- Connect veterans with the services they need through advocacy and outreach
- Ensure ongoing support for our veterans and their families through continuous communication

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<sup>28</sup> California Department of Veteran Affairs Strategic Plan FY 2013/14 – 2015/16

<sup>29</sup> Analysis of CalVet VetPro database which contains 913,550 out of 1,795,455 or 50.9%

### 3.1 Marketing Objectives

The goal of the CalVet marketing plan is to be consistent with CalVet's current Strategic Plan. Therefore, the overall marketing objectives come directly from the performance metrics outlined in 'Veterans Outreach and Services' in CalVet's Strategic Plan:

- 5% annual increase in total number of veterans in the CalVet database
- 5% annual increase in claims submitted by CalVet and CVSOs
- 5% annual increase in dollars received through claims submitted by CalVet and CVSOs

### 3.2 Market Segmentation

It isn't surprising that California has the greatest number of veterans of any state and there are many ways to naturally segment that population. The USDVA Veteran Population Model 2011 provides data that suggests segmentation based on wartime versus peacetime service, era (Gulf War, Vietnam, Korea, WWII), gender, or even minority status. In addition, CalVet has acknowledged the importance of improving outreach to women and minority veterans by creating Deputy Secretary positions and divisions for each. We recommend segmenting the veteran population into two broad segments based on methods of outreach and veteran utilization of media, which broadly means segmenting based on age.

#### 3.2.1 Veterans over 55

Based on the information provided in the core service offering and veteran demographics sections we choose 55 years old as the natural cut-off for segmentation. This is the age at which veterans are first eligible for Veterans Homes and it also represents a nearly 60/40 split, with a little over 60% of veterans currently over the age of 55. Based on interviews with VSOs discussing veteran membership we believe that this demographic generally has a positive disposition towards veteran service organizations, which provides a focus for acquisition. Most likely the older veteran is no longer eligible for a CalVet home loan (due to being beyond 25 years removed from active duty), and is less likely to engage in social media such as Facebook and Twitter but does use the internet to learn about services<sup>30</sup>. Therefore we assess the older veteran is best reached through VSOs, face-to-face event opportunities such as county fairs, through discussions of veteran homes benefits and burial benefits, and traditional media such as print, radio, and television.

#### 3.2.2 Veterans under 55

Generally a Gulf War Era veteran under the age of 55 who is less likely to be a member of an established VSO such as the Veterans of Foreign Wars or American Legion, typically a heavy user of the internet and mobile, uses all forms of social media and expects two-way communication<sup>31</sup>. Therefore we assess the younger veteran is best reached via social media, face-to-face opportunities such as job fairs, and through discussions of education and home loan benefits.

### 3.3 Targeting

Since the demographic split between older and younger veterans is roughly 60/40 we believe it is important to target both the younger and older population groups while also focusing on recommendations that will help improve access to both groups. Similarly, there are equal

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<sup>30</sup> Does not imply that older veterans don't use social media, just that they are less likely to use it than younger veterans: Older adults and internet use, *Pew Research Center's Internet & American Life Project*

<sup>31</sup> National Survey of Veterans, 2010

numbers of veterans in the database as there are outside the database and we believe CalVet needs to improve their internal communication and process flow as much as their external positioning and partnerships. Therefore, we are targeting both old and young veterans as well as improving outreach to the veterans within the database and outside the database. As the percentages change it will be incumbent on CalVet to continually update the targeting strategy.

### 3.4 Positioning Statement

An organization may have a mission statement and vision statement, but if those statements don't resonate with the customer then it is time to consider using a positioning statement. A well-developed positioning statement supports an organization's mission. It should clearly and consistently articulate the unique tangible benefits that distinguish an organization from others in the market, and it should grab the customer's attention and be interesting. A positioning statement conveys what an organization does, for whom, to solve an urgent need, with proof points as well as points of difference and points of parity with other organizations. Currently, there is confusion as to who CalVet is or what benefit CalVet provides, and the communication of CalVet as a coordinator or reference point within a larger service delivery network as well as a service provider may not be obviously understood by the average veteran. Without a clear and unified positioning statement, veterans aren't certain what value CalVet adds.

The following is a recommended positioning statement:

To all the men and women who have served in the US Military at home and abroad, CalVet is your advocate and will help you claim the state and federal benefits you are entitled to receive. We are committed to delivering the best possible service; we care because many of us are veterans ourselves, and we have a demonstrated track record of improving the lives of California veterans<sup>32</sup>.

The following are proof points for the positioning statement as well as points of parity and points of difference outlining why CalVet is perfectly positioned to address the customer:

We are uniquely positioned as a Department within the California state government to be the best-suited organization to tackle issues on behalf of veterans as well as provide services. Our statewide infrastructure, long-standing relationships with CVSOs, and natural position as the leading organizer for all California Veteran Service Organizations make us the premier entity in California for assisting veterans.

However, we are not the same as or synonymous with the USDVA. Our mandate is not to assist the entire nation's population. We focus only on assisting California veterans in obtaining benefits and services from USDVA and in providing benefits and services ourselves.

The positioning statement should be the focal point for all the communication and advertising promoting CalVet while the remaining statements provide clarity for why the positioning statement is true, but will not necessarily appear on any communications or advertising.

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<sup>32</sup> A great example of providing proof would be a separate link on the website that demonstrates success such as the recent Strike Team initiative that helped reduced the VA claim backlog.

Recommendation: Refine CalVet’s message by using a positioning statement that better defines how CalVet meets the intent of the mission statement, and communicate it consistently across all facets of the organization.

For reference, below are examples of several mission statements from other states:

- **Florida Department of Veteran Affairs:** “To advocate with purpose and passion for Florida veterans and link them to superior services, benefits and support.”
- **Texas Veterans Commission:** “To advocate for and provide superior service to veterans in the areas of Claims Representation and Counseling, Veteran Employment Services, Veteran Education Services, and Fund for Veteran Assistance grant funding that will significantly improve the quality of life for all Texas Veterans and their Families.”
- **New York State Division of Veteran Affairs:** “The New York State Division of Veterans’ Affairs (DVA or Division) advocates on behalf of New York’s Veterans and their families, as individuals and as a group, to ensure they receive benefits granted by law for service in the United States Armed Forces.”
- **Illinois Department of Veteran Affairs:** “The mission of the Illinois Department of Veterans’ Affairs (IDVA) is to empower veterans and their families to thrive. We do this by assisting them in navigating the system of federal state and local resources and benefits; by providing long-term health care for eligible veterans in our Veterans’ Homes; and by partnering with other agencies and non-profits to help veterans address education, mental health, housing, employment, and other challenges.

### 3.5 Recommendations

In order to execute the marketing strategy, a tangible implementation strategy is necessary. A reassessment of CalVet’s positioning has already been discussed, however, the remainder of our recommendations fall into four parts:

- 1) Social Media
- 2) Organizational Change
- 3) CVSOs
- 4) Partnerships and Outreach

#### 3.5.1 Social Media

CalVet should operate a multi-pronged social media program to identify, educate, and interact with the approximately 1.8 million veterans residing in California. Below is a blueprint of key aspects of a social media program.

##### *Goals*

- **Awareness:** Engage veterans quickly and in real-time to promote CalVet as a veteran advocate
- **Interaction:** Enable veterans to communicate and interact directly in a two-way conversation with CalVet

- Action: Direct veterans to CalVet’s programs and veteran benefits and services

### *Branding*

- Use CalVet logo and background image for each account to make profiles instantly recognizable and ensure a consistent image
- Make sure cover image conveys a unique benefit, is relevant, and uses graphical text to address visitors

*Content:* Operate intentional, consistent planned outreach of high-quality content in order to distribute information, promote news, direct veterans to CalVet programs and eligible benefits and services, and control CalVet branding

- Operate the 5-3-2 rule, which stipulates that out of 10 posts:<sup>33</sup>
  - Five should be content from others, relevant to your audience
  - Three should be content from you, relevant to your audience
    - Posts should include: facts, time saving tips, frequently asked questions, key updates on program areas, updates on benefits and services (e.g., benefit of the month), articles about veterans in California, and legislative efforts CalVet is engaged on behalf of veterans
  - Two should be personal, something non-work related to help humanize CalVet’s brand
- Refine communications plans based on insights learned from monitoring and direct engagement with veterans online, CVSO and LINC reports, and upcoming events or popular benefits and services

*Channels:* Simultaneously employ Facebook, Twitter, and YouTube in order to cross-message, educate, and interact directly in a two-way conversation with veterans

- Facebook
  - Post no more than 2 times per day, seven days a week, 10:00 am-9:00 pm; aim for 5-10 posts per week<sup>34</sup>
  - Allow veterans to post on CalVet’s Facebook wall by enabling the “Use Facebook as Page” option<sup>35</sup>
    - Establish guidelines to monitor tone and quality of posts
  - Interact with veterans answering questions and respond to feedback<sup>36</sup> within 2 hours<sup>37</sup>
  - Interact with influential users in the veteran community and begin to build a network of contacts to leverage in the future
- Twitter
  - Send at least 5 tweets a day, from 8:00 am to 10:00pm; never more than 1x per hour<sup>38</sup>

<sup>33</sup> <http://www.heinzmarketing.com/2011/10/the-5-3-2-rule-for-social-media-content/>

<sup>34</sup> <http://www.fastcompany.com/3029019/work-smart/the-social-media-frequency-guide-how-often-to-post-to-facebook-twitter-linkedin-a>

<sup>35</sup> How to: <http://smallbusiness.chron.com/allow-wall-posts-organizations-facebook-30285.html>

<sup>36</sup> <http://socialmediadata.com/social-media-checklist-template-for-facebook/>

<sup>37</sup> [http://cwhonors.org/case\\_studies/2013Finalists/Innovations/1469\\_CAdoptofMotorVehicles2013.pdf](http://cwhonors.org/case_studies/2013Finalists/Innovations/1469_CAdoptofMotorVehicles2013.pdf)

- Interact with influential users in the veteran community by sending direct messages, using the @<twitter handle> feature and retweeting (RT) to build a network of followers
- Monitor and utilize hashtags pertaining to veterans, including: #veteran, #ptsd, #vietnam, #proudamerican<sup>39</sup> to target veterans within the twitter community and identify their general sentiments and needs
- Interact with veterans by responding to questions and feedback and asking questions directly
  - Target response to all Twitter inquiries within 2 hours<sup>40</sup>
- YouTube
  - Disseminate helpful education videos for veterans and their families
  - Utilize an incremental approach- start by posting videos and slowly expand content available to include PSAs, video press releases, and how-to videos for accessing popular benefits and services
    - Target YouTube videos to veterans of different demographic groups by having veteran spokespeople speak to issues relevant to their particular demographic

### *Technology*

- Employ Hootsuite<sup>41</sup> to enhance tracking, reporting and timeliness of communications.
  - Hootsuite will enable CalVet to manage all social media accounts from within one application
  - Multiple employees within CalVet can access their own part of social media with permissions allowed inside the app

### *Policy, Procedure, and Guidelines<sup>42</sup>*

- *Abide by Pre-Existing State Social Media Policies & User Guidelines*
  - OCIO IT Policy Letter<sup>43</sup>
  - OCIO Social Media Standard Simm 66B<sup>44</sup>
  - CIO Council's Guidelines for Secure Use of Social Media by Federal Departments and Agencies<sup>45</sup>
- *Interaction Guidelines*
  - CalVet should monitor Facebook and Twitter throughout the business day and respond to all social media inquiries within 2 hours (this is the CA DMV target)
  - Standardized response times for inquiries and coordinated communication effort between all medias to announce and disseminate relevant information

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<sup>38</sup> <http://www.fastcompany.com/3029019/work-smart/the-social-media-frequency-guide-how-often-to-post-to-facebook-twitter-linkedin-a>

<sup>39</sup> <http://ritetag.com/best-hashtags-for/veteran>

<sup>40</sup> [http://cwshonors.org/case\\_studies/2013Finalists/Innovations/1469\\_CADeptofMotorVehicles2013.pdf](http://cwshonors.org/case_studies/2013Finalists/Innovations/1469_CADeptofMotorVehicles2013.pdf)

<sup>41</sup> <https://hootsuite.com>

<sup>42</sup> [http://media.govtech.net/GOVTECH\\_WEBSITE/EVENTS/PRESENTATION\\_DOCS/2011/GTC\\_West\\_2011/Social\\_Media\\_in\\_Government\\_CADMV.pdf](http://media.govtech.net/GOVTECH_WEBSITE/EVENTS/PRESENTATION_DOCS/2011/GTC_West_2011/Social_Media_in_Government_CADMV.pdf)

<sup>43</sup> [http://www.cio.ca.gov/Government/IT\\_Policy/pdf/ITPL\\_10-02\\_Social\\_Media.pdf](http://www.cio.ca.gov/Government/IT_Policy/pdf/ITPL_10-02_Social_Media.pdf)

<sup>44</sup> [http://www.cio.ca.gov/Government/IT\\_Policy/pdf/SIMM\\_66B.pdf](http://www.cio.ca.gov/Government/IT_Policy/pdf/SIMM_66B.pdf)

<sup>45</sup> [http://www.cio.gov/Documents/Guidelines\\_for\\_Secure\\_Use\\_Social\\_Media\\_v01-0.pdf](http://www.cio.gov/Documents/Guidelines_for_Secure_Use_Social_Media_v01-0.pdf)

### *Administrators*

- Identify the person(s) who will have primary responsibility for monitoring social media; discuss how much monitoring will be needed for each social media presence
- Share responsibility- create shared username and password so account is not tied to a specific individual

### *Metrics for Success*

- Reach
  - Total Followers
  - Audience Growth Rate
- Engagement: check the pulse of network to see how social media efforts are resonating with your established base of followers
  - Average engagement rate (posts over time)
- Acquisition: visitor frequency rate
- Conversation
  - Assisted social conversions, last click (direct) conversions

### *Analytics: Monitor, Analyze, Adapt<sup>46</sup>*

- Track results- utilize analytics and online monitoring tools to measure how much engagement posts are generating. Understand what is getting attention and what isn't, as well as which types of posts generate the most positive feedback to guide how to best adjust strategies over time<sup>47</sup>
- Measure, monitor, interpret, and analyze social media data in real time to communicate and interact with veterans in a more effective manner through different social media channels

### *Conclusion<sup>48</sup>*

The key to social media is being active over time. Social media users expect frequent, timely updates and therefore diligence and consistency are vital to the success. Content should also be current and posted in a timely manner. In order to build a positive relationship with users, response to questions and feedback is essential. Make sure that content is accurate, proofread before posting, and give source citations in order to build credibility and generate traffic. Posts remain online indefinitely and get shared widely so it is important to be thoughtful and ensure content is relevant and credible. Social media will enhance CalVet's outreach efforts to increase veteran interaction and improve communication and education opportunities.

### **3.5.2 Organizational Change**

Through several recommended improvements, CalVet can leverage its existing staff resources and organizational structure to better define, plan, and operate a systematic marketing effort. The advantages of CalVet's current structure include Program PIOs that are essentially responsible for communications for their respective core service area and a graphic designer that is familiar with

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<sup>46</sup> <http://socialmediadata.com/a-complete-guide-to-social-analytics/>

<sup>47</sup> <http://socialmediadata.com/how-to-develop-an-effective-social-media-strategy-outline-for-your-business/>

<sup>48</sup> <https://marketing.purdue.edu/Toolkit/SocialMedia>

CalVet's branding and style. The biggest challenges associated with CalVet's current organizational structure include:

- The Deputy Secretary of Communications & Legislative Affairs is stretched too thin and prioritizes the legislative affairs responsibilities. Given this limited capacity, marketing and communications planning, outreach, and oversight is given less consideration.
- The Communications & Legislative Affairs Department has not defined clear marketing roles and responsibilities for the staff that perform marketing related tasks. This results in inconsistent marketing efforts across programs and divisions.
- While each PIO is responsible for communication of their individual programs, this limits the coordination and message consistency of CalVet overall as an organization.
- Veteran Services and the Communications & Legislative Affairs divisions both conduct marketing efforts in their own respective siloes, which result in inconsistent, overlapping, and uncoordinated outreach efforts. These divisions lack coordination and systematic processes for information sharing and communications support. Any form of outreach to veterans, including direct engagement via CVSOs or LINC's to mass media releases, fall under the purview of marketing and must be integrated to ensure and elevate a consistent voice and brand.

In order to address limitations associated with the existing organizational structure of CalVet's marketing efforts, below are recommended improvements to resources, organization, process, and collaboration.

*Re-organization:* The Communications & Legislative Affairs Department should be broken into two departments: 1) Communications Department, and 2) Legislative Affairs<sup>49</sup>.

*New Position:* We recommend that CalVet create a Deputy Secretary for Communications who is responsible for driving overall strategy for the organization and creating alignment and focus across the organization for focus areas, content creation, and purposeful use of the content to support goals.

### **3.5.2.1 Communications Department**

The Communications Department should leverage the existing structure of the Communications & Legislative Affairs Department, in terms of Program PIOs and the Graphic Designer, and improve marketing efforts by better defining marketing roles and responsibilities. The Communications Department should be organized by four main subdivisions: Operations, Creative, Programs, and Field-Outreach. Below are the key marketing roles and responsibilities for each subdivision:

- **Operations – Communications Deputy Secretary (new position)**
  - Develop overall plan and timing of published content which evolves based on input from PIOs and LINC's
  - Public relations, including responding to media inquiries
  - Prepare budget
  - Responsible for reporting, analytics/data, testing, website
  - Manages systems and processes

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<sup>49</sup> FDVA is another organization that also splits communications and legislative affairs into two divisions

- Provides monthly update of upcoming news and meeting minutes from VSO meetings that are distributed to post-level staff at VSOs (consistent collaboration)
- Access database and track demographic changes in order to modify the marketing plan based on real-time data
- Social Media Lead- owns the growth of traffic from social media efforts
- Creative- Graphic Designer
  - Drives consistency visually and in organizational voice
  - Responsible for graphic design and core visual language
  - Generates outreach and marketing materials
- Programs – Veteran Homes PIO, Home Loans PIO, Veteran Services PIO, Special Projects PIO
  - Develop monthly goals and strategies for programmatic outreach
  - Identify content and other material needs and submit requests to Communications Deputy Secretary
  - Identify marketing channels by which to disseminate message
  - Perform outreach based on strategic plans
- Field-Outreach- LINC's (under Veteran Services, but cross-collaboration with Communications for information sharing)
  - Serve as brand ambassadors for CalVet and interact directly with veterans and CVSOs
  - Gather information and insights about veteran sentiments and needs from CVSOs and direct contact with veterans
  - Support CVSOs by providing outreach/communication plans and materials

### *Communications Planning Process*

In order to better plan and execute a marketing strategy, two key planning materials are essential:

1. Strategic Communications Plan- a written document that describes:
  - Annual communications objectives
  - Target Audiences (for example veterans of different demographic groups, families of veterans, VSOs)
  - Strategies to accomplish objectives, including:
    - Tools (flyers, print ads, YouTube videos, posters, conferences)
    - Key Messages
    - Timetable that outlines roughly what projects will be accomplished and when separated in logical time periods (monthly, weekly, etc.)
  - Evaluation protocols to measure the results of the program
    - Monthly report on work in progress (dovetails with Monthly Content Calendar)
    - Year-End Summary
2. Monthly Content Calendar- is a planning tool for communications content generation and dissemination
  - Sets monthly themes based on strategic communication objectives
  - Develops newsworthy topics for each theme
  - Identifies platforms used to deliver content
  - Schedule for content, driven by new release dates, key events, and other strategic considerations

- Tracks progress to manage projects by including a list of content development tasks for each topic with due dates

The Communications Deputy Secretary is responsible for coordinating, synthesizing, drafting, finalizing, and managing strategic communications plan and monthly content calendars. Below is a process by which the Communications Deputy Secretary works with key staff to prepare these planning documents.

- Program PIOs submit recommendations to Deputy Secretary of Communications for strategic communications action plan and monthly content calendar
- Communications Deputy Secretary synthesizes recommendations from Program PIOs and generates draft strategic communications action plan and monthly content calendar
- Communications Deputy Secretary submits strategic communications action plan and monthly content calendar to Program PIOs for review
- Program PIOs review and submits annual communications action plan and monthly content calendar to their respective supervisor for approval and submits approved copy to Communications Deputy Secretary within 48 hours for content calendars and within one week for annual communications plan
  - Supervisors with approval powers should be identified
  - In the event of disagreement, Program PIOs are responsible for organizing a meeting with their supervisor and the Deputy Secretary of Communications to resolve the issues
- Communications Deputy Secretary compiles final strategic communications plan and monthly content calendars
- Communications Deputy Secretary works with Creative and Program PIOs to oversee and generate monthly communications content and materials as per approved content calendar plans
- Communications Deputy Secretary supports the execution of the communications plan in collaboration with Program PIOs and other key staff

#### *Inter-Division Collaboration*

The Veteran Services PIO will serve as the key conduit between the Veteran Services division and Communications. LINC's serve as the main conduit between CalVet communications staff and veterans and CVSOs.

- Veteran Services PIO
  - Veteran Services PIO has authority to engage directly with LINC's in a regular, systematic manner by collecting monthly feedback reports from LINC's regarding veteran needs and sentiments and submits this information to the Communications Deputy Secretary to refine outreach plans
    - Veteran Services PIO, in consultation with Deputy Secretary of Veteran Services and Deputy Secretary of Communications, should prepare a standardized monthly field report template and establish guidelines for LINC's to collect information and submit to CalVet headquarters
  - For communications planning, the Veteran Services PIO submits semi-final communications action plan and monthly content calendars to Deputy Secretary of Veteran Services who must approve the plans within one week for annual action plan and 48 hours for monthly content calendars

- In the case of disagreement, Veteran Services PIO is responsible for organizing a meeting with their supervisor and the Deputy Secretary of Communications to resolve the issues
  - LINC's & CVSOS
    - CVSOS engage directly with veterans and deliver insights from these engagements to LINC's (see CVSOS section of report for more information on leveraging the CalVet-CVSO relationship)
    - LINC's connect with local CVSOS to collect insights into veteran needs and sentiments and transmits information to Veteran Services PIO via monthly field reports
    - LINC's serve as first point of contact for CVSOS from an administrative perspective and provide CVSOS with any support requested as well as communications and outreach resources as per communications plans and content calendars

*Evaluation*

- Monthly report on work in progress
- Formalized department reports for presentation to staff
- Periodic briefings of the Secretary and the Undersecretaries
- Year-end summary for the annual report

**3.5.2.2 Database Management**

Currently CalVet manages as many as seven lists or databases (collectively referred hereafter as the 'databases' or 'database' even though some may be email lists or excel spreadsheets). The gross number of veterans across all databases is 1.28 million although there is an undetermined amount of overlap among the data. In general, Veteran Services manages the major databases and retains approval rights for accessing five out of seven databases directly or indirectly as indicated in Table 5. Therefore we have determined that there are two main impediments to clear and concise information flow across all divisions within CalVet:

- Too many databases with redundant information
- Lack of independent access to the database by other divisions

**Table 5: List of databases and method/time to access data**

Database	Method of Access	Lead time to obtain data
VetPro	Vendor, Vet Services	0-2 business days
Reintegration Forms	Vet Services	Immediate and easy
Website	Vet Services	Immediate and easy
DD214	Vet Services	Immediate and easy
DMV	Vet Services	Immediate and easy
Listserv	Request Report	2-3 business days
Women Roster	Women Veteran Affairs	

We recommend combining the databases into one database that provides independent access to all divisions according to their permissions, which will be managed by Veteran Services. Once in place the additional benefit is the ability to mine the data to evaluate performance over time and analyze the data via a dashboard or similar type of "quick-look" tool. The following paragraphs will cover each recommendation in more detail.

### *Combining the databases*

Data migration is not a simple task, and it is not expected that CalVet possesses the level of expertise required to migrate the data from the disparate databases into one system. This recommendation requires the use of an expert third party, one such company that may be used is Salesforce. A modern customer relationship management system (CRM) is a key enabler for CalVet in executing and assessing a marketing plan. Once the information is combined it will provide CalVet a more accurate snapshot of exactly how many unique veterans exist in the database, including a detailed analysis of contact information for each veteran, such as emails and mailing addresses. This type of information matters because one report suggests that more than 50% of the 65 and older population use and maintain e-mail addresses<sup>50</sup>. We feel so strongly about the need to include email addresses for all contacts due to the low cost involved, that a concerted effort should be made to add email addresses through outreach, use of emails as logins, as well as including email addresses in Section 5 of DL Form 410 on DMV driver license renewal forms.

We have attempted to estimate the exact overlap of data using the assumptions outlined in Table 6, however, it is still a best guess based on a number of factors with a disappointing confidence interval. This is one more reason why combining the data into one database is important.

**Table 6: Contact information by database**

<b>Database</b>	<b>Mailing Addresses</b>	<b>Emails</b>
VetPro	685,481	46,068
DD214	86,264	NA
DMV	70,486	NA
Listserv	NA	71,398
Total	842,231	117,466
Overlap 20%	168,446	23,493
Inaccurate factor 10%	33,689	NA
Valid Data assumption	640,096	93,973

Furthermore, without clarity of data it will be difficult for CalVet to ever accurately assess the objective of increasing the number of veterans in the database by 5%. If based on the gross number of veterans across all databases the goal could be 64,000 additional veterans (1,280,000\*5%). With nearly 913,000 contacts in the VetPro database, that goal could be 45,700 additional veterans (913,000\*5%) or if there are 750,000 unique veterans across all databases it could be 37,500 (750,000\*5%).

### *Independent Access*

Veteran Services should continue to manage the database, but a modern CRM system will allow Veteran Services the ability to configure the information to which other divisions have access. Allowing the other divisions within CalVet the ability to independently access information will

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<sup>50</sup> Older adults and internet use, *Pew Research Center's Internet & American Life Project*

reduce the lead times and approval process currently in place while still assuring Veteran Services is not providing access to sensitive information.

*Analyzing the Data*

Once the veteran data is located in one database it will allow for a more detailed assessment of performance and can inform how CalVet markets. For example, assuming there are no duplicates in the database it would be very simple to assess performance by county by comparing the actual number of veterans in the database with the expected number of veterans that reside in the county. Using Table 7, one might decide to learn more about the processes in place that are working well in Alameda county while sending more resources and traditional media expenditures to Riverside county. Of course a similar analysis could be done using gender or age demographics as well.

**Table 7: Using database information to inform targeting**

Country	# of Veterans	# in Database	% in Database
ALAMEDA	60,309	55,168	91.4%
CONTRA COSTA	55,291	42,450	76.8%
LOS ANGELES	319,623	223,976	70.1%
ORANGE	127,012	90,397	71.2%
RIVERSIDE	133,476	72,404	54.2%
SAN DIEGO	226,852	158,287	69.8%

*Dashboard*

For a high-level or quick-look analysis we recommend making a “dashboard” to understand the situation at a glance. The “dashboard” should include a quick summary of the veterans in the database, updated every month, with access provided to everyone in CalVet.

The “dashboard” could be divided into three segments such as region, gender, and age. Similar to Table 7, here is an example of what the “dashboard” could include:

- a) Predicted number of veterans by the VA in a specific segment
- b) Number of veterans in the database for the segment
- c) Number of veterans who used/are using services
- d) Number of claims from the segment

**3.5.3 County Veteran Service Officers (CVSOs)**

CVSOs play an integral role in the outreach work that is done with California veterans, acting as the “boots on the ground” service representatives who connect veterans and their families to the benefits and services that they have earned. CVSOs and veteran service representatives initiate veteran’s claims and develop them, using CalVet as the intermediary who reviews the claim, develops it, and represents the claimant before the federal VA. While both CalVet and CVSOs are passionate about improving the quality of life for veterans, governance structure has presented barriers in the achievement of this goal. Although LINC’s have been proposed as a positive conduit of CalVet information to CVSOs, the lack of formal process for how this occurs and their small numbers (8 total in the entire state) limit their overall effectiveness (Organizational change

section presents an example of improved collaboration led by LINC). A well-functioning and communicative relationship between CalVet and CVSOs that utilizes standardized processes to evaluate and monitor performance is one that best supports veteran outreach and consistent data acquisition.

**Recommendation:** CalVet should commit to improving their existing relationship with CVSOs, and standardize their communication process with them.

While the CalVet-CVSO Best Practices Manual makes reference to “talking points,” CalVet should engage CVSOs for their ideas on how to improve the flow of communication. One suggestion is to invite CVSOs to CalVet headquarters, or have a third-party neutral convener broker the meeting, with the intent to establish an ongoing conversation regarding communication best practices. This conversation could take place within a broader subject matter, such as veteran outreach.

Another suggestion is for CalVet to create an annual CVSO satisfaction survey, and solicit regular feedback as to their concerns and support of certain concepts or initiatives. An anonymous survey would permit CVSOs to be candid in their feedback, and would give CalVet an honest assessment of their relationship going forward.

**Recommendation:** CalVet should consider setting performance-metrics based upon demographic county veteran population data, using incentives to reward high-performing CVSOs.

CalVet has specified several performance-metrics in its Best Practices Manual that will measure success in contacting veterans and their families. For instance, one measurement is the number of attendees at outreach events; however, this is a process measurement, and it doesn’t take into consideration the veteran population where the event is being held. Ten veterans attending an outreach event in Siskiyou County may be high for that region, but that number would undoubtedly be low in Los Angeles County.

CalVet should compare county-based veteran demographic data (e.g., number of veterans in each county) with the county-specified data it maintains on the 900,000 veterans within VetPro (See Database Management section, with targeting by database example). After accounting for those differences, CalVet could identify the counties with higher numbers of veterans on whom they do not have contact information on – and set specific goals for those CVSOs to meet unique veteran database increases. To encourage CVSO participation, CalVet should consider offering funding incentives for high-performing counties. A targeted county approach would also work for veterans who report as being disabled, but are not receiving compensation and pension benefits. A state auditor report indicated that county-specific disability information could be obtained through publicly-available U.S. Census Report data.<sup>51</sup>

#### **3.5.4 Partnerships and Outreach**

The purpose of this section is to discuss a major player in the veteran landscape: Veteran Service Organizations (VSOs). Throughout the research phase, it became clear that there exist many

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<sup>51</sup> <http://www.bsa.ca.gov/pdfs/reports/2009-108.pdf>

parallels between CalVet and VSOs, in terms of their contact with veterans, mission, and challenges.

In terms of contact, VSOs are major touch points for veterans, with 55 officially chartered organizations in California and dozens more unofficial organizations. Membership ranges up to millions of veterans across the world for the largest VSOs. Through our conversations with VSOs, it became clear that the overall VSO mission is aligned closely with that of CalVet - serving those who have served their country. Given this drive to make a difference in veteran lives, it follows that the connection between these organizations can be made stronger. In addition, the same challenges that we heard from CalVet for veteran outreach were echoed by VSOs when describing their own problems. For example, just as CalVet sees disproportionate ages among the veterans that apply for its benefits, VSOs see a lack of younger members and a difficulty in reaching out to that specific veteran population. Other challenges include managing a database of veterans and generating awareness of benefits available to veterans.

For CalVet, we believe that there should be a formal process for updating VSOs with changes to CalVet's service offerings. In order to find models to standardize this communication, we looked at the efforts of states outside of California, such as Florida. As described above in the "Florida Case Study" section, Florida has a Veteran's Council composed of the senior leadership of all major VSOs, as well as the leadership of the FDVA. The attendee for each organization is tasked with pushing this information out to relevant posts and ground-level employees of the organization. Given the interaction that VSOs have with veterans, there is an opportunity for information sharing on veteran needs and demographics.

Feeding into this system of shared information is a "referral system" from VSOs to CalVet. This system would allow for data analytics for CalVet to see which organizations are serving as strong sources of veteran acquisition, which is an important component of future outreach strategies.

Finally, through our conversations it became clear that the USDVA is an organization that is not only well-known, but actively engaged and referenced by VSOs in answering veteran questions. This same model should be applied to CalVet, which should play an active role in making sure that VSOs are well aware of its service offerings.

The current state of CalVet's relationship with VSOs is not optimal for outreach efforts. Most contact happens sporadically, through organized events and conferences such as Legislative Day, Women's Veteran Conference, etc. Outside of these events, most "routine" conversation is conducted almost entirely to the upper and middle tiers of VSOs who do high-level strategy and planning work for the organization. Although it makes sense for these leaders to be points of contact for CalVet, information on veteran benefits and services are not disseminated to the lower tiers of the organization. The reason this is problematic is that the very employees who are speaking directly to veterans and giving them specific advice on how to file claims are unaware of how CalVet fits into the picture.

### *Recommendations*

Given our research with VSO and veteran affairs departments within and outside of California, we

have assembled several best practices and lessons learned. We recommend that CalVet consider implementing these recommendations to better engage with veterans and VSOs:

- 1) Create a formal system for interaction with major VSOs on a regular basis. Conversations can be more valuable if all relevant players can be brought to the table together. The precedent in Florida is for monthly meetings as a part of a formal organization: the Florida Veteran’s Council.
- 2) Encourage VSOs to disseminate information to the ground level employees. Can be integrated with the suggestion of frequent meetings, or through one internal champion<sup>52</sup> in charge of speaking directly to CalVet.
- 3) Explore the benefits of a VSO training system. This can be a part of frequent meetings, but could also be accomplished through the existing CVS0 training model.
- 4) Enhance social media marketing and engage “younger” VSOs (e.g. IAVA) to better reach out to younger veterans and bring them into your database.

## **4.0 Financial**

The intent of this section is to help CalVet evaluate the projected costs and benefits of this marketing plan. Recognizing that some recommendations may have no cost depending on how they are implemented, it is impossible to provide one accurate number. For example, a new position could be the re-purposing of a current employee rather than a new hire, or a basic social media dashboard could be free rather than a premium version. Rather a framework is provided solely to give CalVet a sense of what costs may be incurred and the benefits gained.

### **4.1 Cost**

Of the five recommendations, three are assessed to be nearly cost neutral in that existing resources can be utilized to implement the recommendations. The total expected outlay for implementing all parts of the two recommendations that incur costs ranges from \$13,000 to \$213,000 per year.

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<sup>52</sup> The ‘champion’ concept is well known to CalVet but the variation here is that the ‘champion’ in the VSO should be a ‘ground-level’ employee as opposed to an executive of the VSO.

**Figure 4: Cost Estimates for Implementing Marketing Plan Recommendations**

Recommendation	Cost Range	Notes
1. Positioning	Cost Neutral	
2. Social Media	\$0 - \$110/yr	Utilizing HootSuite in this example there are free versions as well as premium versions
3. Organization Change		
New Deputy Secretary	\$0 - \$150,000/yr	This could be a re-purposed current employee or an additional employee
Database Migration and CRM	\$13,000 - \$63,000/yr	Utilizing Salesforce, a more accurate quote is needed after the contractor assesses the databases. Initial figure is for CRM management cost and the higher number is the best guess for the migration and management of the database
4. CVSOs	Cost Neutral	There may be additional costs for hosting events and travel depending on how this is executed.
5. Partnerships and Outreach	Cost Neutral	There may be additional costs for hosting events and travel depending on how this is executed.
Total	\$13,000 - \$213,000	If all recommendations are implemented the yearly costs could vary dramatically depending entirely on how they are implemented

**4.2 Benefits**

Analyzing CalVet<sup>53</sup> and FDVA<sup>54</sup> data we wanted to compare industry standard customer acquisition costs using the internet to the average veteran benefit received. It is worth noting we are not making the case that actions that assist veterans should be evaluated only on the merits of a cost benefit analysis. Instead the goal is to inform that money spent on helping veterans produces a larger benefit to the veteran and to some extent increases consumption in California using federal funds.

If the marketing objectives are achieved then a 5% annual increase in the number of veterans in the database equals 45,000 (900,000\*5%<sup>55</sup>). Customer acquisition costs (CAC) vary by industry, however, if \$600,000<sup>56</sup> in total acquisitions costs were directed towards marketing and 45,000 new veterans joined the database a CAC of \$13 per customer wouldn't be unreasonable for benefits and services that are free to the customer. If the average benefit from each veteran claim

<sup>53</sup> AB 101 Subvention and Joint Claims Initiative Progress Report, Page6-7

<sup>54</sup> Annual report Fiscal Year 2012-2013 FDVA, Page 8

<sup>55</sup> Based on the roughly 900,000 veterans in the VetPro database

<sup>56</sup> This number is rounded from 'Cost Case 2 + Advertising' in Figure 5

is \$300<sup>57</sup> and 25%<sup>58</sup> of all the new veterans in the database file a claim (conversion rate) then the total benefits to veterans would be \$3.4 million (45,000\*25%\*\$300). This basic example provides a cost benefit rationale for why money spent on acquiring veterans could create a five-fold (\$600,000 versus \$3.4 million) return for the veteran and California economy as a whole.

However, this analysis does not account for the yearly veteran benefits that accrue over time. Figure 5 provides a basic sensitivity analysis over a five-year time period using three different cost scenarios, veteran database increases at different rates, and at high or low conversion rates. A return on investment multiple is then calculated for each example. Cost case 2 and a 5% database increase with a high conversion rate is most likely, resulting in a multiple of over 19 to 1. The most conservative estimate is the 5% database increase, with a smaller population FDVA is serving over 100,000 veterans per year for the last two years, and has a multiple of 141 to 1<sup>59</sup>. We believe that CalVet will serve significantly more veterans per year than the initial 45,000 and thus have a much higher multiple.

**Figure 5: Return on Investment Multiples Under Various Scenarios**

Assumptions		
Cost Case 1	\$13,000	Minimal spend per year
Cost Case 2	\$213,000	High cost first year w/ \$150,000 maintenance each year after
Cost Case 3	\$1,113,000	Highest database transition first year w/ \$300,000 maintenance each year after
Additional Advertising Spend	\$400,000	Per year expenditure on advertising
Claim Benefit	\$300	Average claim benefit per veteran

Cost Scenarios	2014	2015	2016	2017	2018	5 year total
Cost Case 1	\$13,000	\$13,000	\$13,000	\$13,000	\$13,000	\$65,000
Cost Case 2 + Advertising	\$613,000	\$550,000	\$550,000	\$550,000	\$550,000	\$2,813,000
Cost Case 3 + Advertising	\$1,513,000	\$700,000	\$700,000	\$700,000	\$700,000	\$4,313,000

Database at 5%	2014	2015	2016	2017	2018	5 year total
% Database Increase	5%	5%	5%	5%	5%	
# Veteran Increase	45,000	47,250	49,613	52,093	54,698	248,653
High Conversion %	25%	25%	25%	25%	25%	
Total Benefit High %	\$3,375,000	\$6,918,750	\$10,639,688	\$14,546,672	\$18,649,005	\$54,129,115
Low Conversion %	5%	5%	5%	5%	5%	
Total Benefit Low %	\$675,000	\$1,383,750	\$2,127,938	\$2,909,334	\$3,729,801	\$10,825,823

Database Decreasing %	2014	2015	2016	2017	2018	5 year total
% Database Increase	5%	4%	3%	2%	1%	
# Veteran Increase	45,000	37,800	29,484	20,246	10,325	142,855
High Conversion %	25%	25%	25%	25%	25%	
Total Benefit High %	\$3,375,000	\$6,210,000	\$8,421,300	\$9,939,726	\$10,714,123	\$38,660,149
Low Conversion %	5%	5%	5%	5%	5%	
Total Benefit Low %	\$675,000	\$1,242,000	\$1,684,260	\$1,987,945	\$2,142,825	\$7,732,030

Return on Investment Multiple	Cost Case 1	Cost Case 2	Cost Case 3
5% and High Conversion	833	19.2	12.6
5% and Low Conversion	167	3.8	2.5
Decreasing % and High	595	13.7	9.0
Decreasing % and Low	119	2.7	1.8

<sup>57</sup> This number is rounded but is based on AB 101 and 8,344 claims receiving \$2,465,890 in annualized claim value

<sup>58</sup> Based on FDVA Annual Report FY2012-2013

<sup>59</sup> FDVA Annual Report FY2012-2013

## **5.0 Summary**

We believe that CalVet is uniquely positioned with a state-wide infrastructure and passionate employee base to be the premier point of entry for the men and women that have served in the US military at home and abroad to access services and benefits to which they are entitled. Ideally, this marketing plan provides a roadmap that allows CalVet to become the standard for excellence in outreach to veterans.

## Appendix A Implementation Plan

Each recommendation presented in this marketing plan is summarized below with who is responsible, what are the next steps, and where appropriate, how those steps will be evaluated.

### **Social Media:**

*Responsibility:* New Communications Deputy Secretary to begin external outreach efforts

*Recommendation:* Social Media Overhaul

*Next Steps:* Leverage social media for real-time, two-way interaction with the veteran and monitor veteran attitudes using analytics, refining marketing efforts based on findings

*Evaluation:* Total followers, audience growth rate, average engagement rate, posts over time, assisted social conversations, direct conversations

### **Organizational Change:**

*Responsibility:* Michael Wells, Undersecretary, Operations, to navigate a large-scale change within the organization

*Recommendation 1:* Restructuring of Communications and Legislative Affairs Division

*Next Steps:* Split the Communications & Legislative Affairs into two divisions: 1) Communications and 2) Legislative Affairs. Create a Deputy Undersecretary-level position for the Communications division that is focused solely on communications and marketing, specifically charged with communications planning, inter-agency process management, and driving consistency among all Public Information Officers (PIOs) and other key marketing staff in the organization

*Recommendation 2:* Communications Department

*Next Steps:* The Communication's division should leverage the existing structure of the Communications & Legislative Affairs, in terms of Program PIOs and the Graphic Designer, and improve marketing efforts by better defining marketing roles and responsibilities, establishing formalized processes for interagency collaboration, and utilizing communications planning tools.

*Recommendation 3:* Database Management and Consolidation

*Responsibility:* Keith Boylan, Deputy Secretary, Veteran Services, and the Veteran Services team

*Next Steps:* Determine the location, size, and information held in each database. Explore and estimate the possibility of consolidating all databases into one, and assigning permission sets to individual employees to control what information can be seen and/or used.

*Evaluation:* Number of unique veteran contacts added to VetPro according to county population demographics; This number goes along with the number with CalVet's strategic plan (5% increase in database number in a year).

**CVSO:**

*Responsibility:* Keith Boylan, Deputy Secretary, Veteran Services, and Veteran Services, who are charged with CVSO collaboration and outreach

*Recommendation 1:* CalVet should commit to improving their existing relationship with CVSOs, and standardize their communication process with them.

*Next Steps:* CalVet will annually administer a CVSO satisfaction survey to regularly assess candid feedback and improve response to concerns.

*Evaluation:* Establishment of Communication Best Practices between CVSOs and CalVet to develop a standardized process. Implementation of ideas that CVSO's provide and responsiveness to a CVSO satisfaction survey.

*Responsibility:* Keith Boylan, Deputy Secretary, Veteran Services, and Veteran Services, who are charged with CVSO collaboration and outreach

*Recommendation 2:* CalVet should consider setting performance-metrics based upon demographic county veteran population data, using incentives to reward high-performing CVSOs.

*Next Steps:* Compile information on differences between counties that can affect the number of veterans brought into the CalVet system. Look at historical claim rates per county and speak to CVSO's to see the challenges their individual counties face.

*Evaluation:* Number of unique veteran contacts added to VetPro according to county population demographics; Amount of funding awarded as incentives to high-performers.

**Partnerships and Outreach:**

*Responsibility:* Michael Wells, Undersecretary, Operations and the new Communications Deputy Secretary due to the generality of the recommendation

*Recommendation 1:* Create a formal system for interaction with major VSOs on a regular basis.

*Next Steps:* Recruit 3-4 of the largest VSO's in the state within the first year. Suggested organizations include DAV, IAVA, American Legion, and VFW. Organize a meeting within the first year to discuss key issues that organizations are facing, and how peers can be helpful. Develop shared goals for parties to work together on.

*Evaluation:* The number of VSO organizations engaged within the first year, and the number of meetings that CalVet is able to organize.

*Responsibility:* Michael Wells, Undersecretary, Operations

*Recommendation 2:* Encourage VSOs to disseminate information to the ground level employees

*Next Steps:* Contact VSO's to survey ground-level employees on familiarity with CalVet. Explore possibility of CalVet contacting ground-level employees directly. Include them on relevant emails and updates to ensure awareness. Set up monthly meetings with VSO's as described, and encourage attendees to send meeting minutes or possibly different delegates to each meeting.

*Evaluation:* Referrals received from VSO's, either to CalVet or to CVSO's. Survey data from ground-level employees, especially if administered before and after recommendations have been implemented, can show clearly the increase in awareness of CalVet's services at the post level.

*Recommendation 3:* Exploring the possibility of a VSO Training System

*Next Steps:* Outline best-practices of the CVSO training model, such as the content emphasized, the frequency of meetings, or the follow-up process. Based on the information and conversations associated with the above recommendation, contact VSO's to gauge willingness and attendance to a CalVet informational or training session.

*Evaluation:* The number of VSO employees that indicate interest or attend a CalVet training or informational session. The degree of familiarity that VSO's have with CalVet's services at the end of the program.