



AGENCY STRATEGIC PLAN

FISCAL YEARS 2014 – 2018

UPDATE ADDENDUM: Vision 2025 Alignment





ACTING COMMISSIONER'S MESSAGE

As we celebrate the 80th Anniversary of the nation's Social Security program, we continue to reaffirm our commitment to preserve and fulfill our social contract to the American public articulated by President Franklin Roosevelt in 1935. Part of this commitment is to ensure our customers remain our number one priority. Every day, our 65,000 dedicated and compassionate employees fulfill our mission of protecting individuals and families against loss of income due to unexpected disability or death or when they reach retirement age. We take pride in serving nearly 64 million individuals who receive almost a trillion dollars in earned benefits annually.

The benefits Social Security provide include payments to retirees, adults and children with disabilities, and surviving family members, delivering on our government's promise to maintain the welfare of the nation. Through the integrity and compassion of our employees, we continue to provide exemplary services that positively affect the lives of so many individuals.

As technology advances and our customers' expectations change, we must evolve and transform the way we operate. In April 2015, we released Vision 2025, our call to action to transform and deliver services for the future. Our new Vision serves as the "North Star" in our quest to deliver a **superior customer experience**, recruit and retain **exceptional employees**, and advance as a forward-thinking, **innovative organization**.

We have created this *Agency Strategic Plan: Vision Alignment Addendum* to identify the current Strategic Objectives that support our new Vision priorities. Additionally, we have defined the eight major management priorities for fiscal years 2015 and 2016, which serve as the foundational efforts in support of our Vision. Beyond these eight management priorities, we are developing a 10-year Vision roadmap of the transformational strategies and initiatives that will reshape our interactions with customers, develop and train our employees, and leverage technology and other innovations to support our programs.

Releasing Vision 2025 and the initial set of management priorities outlined in this Addendum is just the beginning. I am committed to the ongoing engagement with our employees and constituents as we develop the new ideas that will drive this transformation over the next 10 years. I am confident we will achieve our Vision for the future through strong collaboration and engagement with the people who will make it happen, our exceptional employees!

Carolyn W. Colvin
Acting Commissioner

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INTRODUCTION

VISION 2025 OVERVIEW

We developed and published [Vision 2025](#) as the first step in our long-range strategic planning process for envisioning, planning, and achieving success. The Vision provides the aspirational picture of Social Security in the future and will serve as our “North Star” to guide our strategic decisions over the next 10 years. The Vision reflects considerable input from a broad range of audiences and provides a framework for addressing our priorities of Superior Customer Experience, Exceptional Employees, and moving forward as an Innovative Organization.

PURPOSE OF THIS DOCUMENT

On April 27, 2015, we released our 10-year long-term Vision illustrating our commitment to our mission and our approach to address the shift in customer and employee expectations. This addendum aligns the Fiscal Years 2014 – 2018 Agency Strategic Plan with our recently released Vision and highlights where we are focusing our effort and resources to realize this Vision.

Part I of this addendum highlights the alignment of current Strategic Objectives to the new Vision priorities. As we begin our long-term strategic planning process, we reassessed our current Agency Strategic Plan to ensure the Strategic Objectives are consistent with our long-term Vision.

Part II of this addendum addresses fiscal year 2015 and fiscal year 2016 Major Management Priorities. To make the Vision a reality, we are currently developing a 10-year strategic roadmap that outlines milestones for future Agency Strategic Plans. The strategic roadmap will lay out a three-phase approach to achieving the capabilities established in the Vision document. The Major Management Priorities is our first step in focusing and prioritizing the resources to realize the Vision. These management priorities will serve as the first phase of implementation of [Vision 2025](#).

ALIGNMENT OF STRATEGIC OBJECTIVES TO VISION PRIORITIES

[Vision 2025](#) has three priorities: a Superior Customer Experience, Exceptional Employees, and an Innovative Organization.

SUPERIOR CUSTOMER EXPERIENCE

Customer relationships span a lifetime and are supported by access to accurate, real-time, and secure information and services

In 2025, we are focused on our customer’s experience over their lifetime. Enabled by technology and our employees, our customers have real-time access and customer engagement when and where they need us. Customer choice of where and how they receive service is important. Wage-earners, retirees, survivors, and individuals with disabilities and their loved ones come to our agency seeking immediate assistance, care, and help. Other customers, including employers, businesses, non-profits, advocates, oversight groups, and other stakeholders, also require our attention and support.

We actively listen to all of our customers, and we rely on secure, accurate, real-time information and analytics to better understand our customers’ preferences. Through this understanding, we respond to and anticipate our customers’ needs, and thoughtfully craft appropriate service options. To create a superior customer experience in 2025, we provide customer choice, personalized service, customer-centric technology, accurate information, and secure systems.

The following table highlights the fiscal years 2014 - 2018 Strategic Objectives that support our Superior Customer Experience Vision priority.

Table 1 - Strategic Objectives Aligned to Superior Customer Experience Priority

Priority	Strategic Objective
Superior Customer Experience	<ul style="list-style-type: none"> ➤ [Objective 1.1] Develop and Increase the Use of Self-Service Options ➤ [Objective 1.2] Enhance the Customer Experience by Completing Customers’ Business at the First Point of Contact ➤ [Objective 1.3] Partner with Other Agencies and Organizations to Improve Customers’ Experience and Align with the Administration’s One-Government Approach ➤ [Objective 2.2] Protect the Public’s Data and Provide Secure Online Services ➤ [Objective 5.4] Continuously Strengthen Our Cybersecurity Program

EXCEPTIONAL EMPLOYEES

Empowered, knowledgeable, compassionate, and engaged employees are proud to contribute in a flexible and rewarding environment

In 2025, we attract top talent and support our employees through active and continuous engagement, empowerment to make decisions that best serve our customers, and developmental opportunities that span government. We also offer dynamic career paths and multiple opportunities for professional growth. Through diverse and innovative ways, we support our employees in achieving their career goals. We offer our employees highly flexible workplace options, enabling them to create an ideal work-life balance.

Through their compassion and dedication, our employees reflect the “heart of the agency,” providing a high-quality, personalized customer experience to our customers. Our talented workforce includes employees who serve customers directly on the front line, as well as those in supporting roles. We are empowered, knowledgeable, and equipped to meet our customers’ needs at the first point of contact. Direct and personal conversations have always been at the center of our service delivery model and are what make our agency and our employees unique.

The following table highlights the fiscal years 2014 - 2018 Strategic Objectives that support our Exceptional Employees Vision priority.

Table 2 - Strategic Objectives Aligned to Exceptional Employees Priority

Priority	Strategic Objective
Exceptional Employees	<ul style="list-style-type: none"> ➤ [Objective 4.1] Attract and Acquire a Talented and Diverse Workforce that Reflects the Public We Serve ➤ [Objective 4.2] Strengthen the Competency, Agility, and Performance of Our Workforce to Align with the Needs of the Public ➤ [Objective 4.3] Foster an Inclusive Culture That Promotes Employee Well-Being, Innovation, and Engagement

INNOVATIVE ORGANIZATION

The Social Security Administration serves as a model of organizational transformation, agility, and service excellence, built on continuous improvement and forward-thinking strategy

In 2025, we are recognized by the public and across government for our agility and effectiveness in fulfilling our mission. We are forward-looking and adapt to change in serving our vast array of customers while being good stewards of taxpayer dollars through efficiency and continuous improvement. We continually look for ways to build our customer and employee engagement and measure the impact of these strategies. We use technology and analytics as well as interactive engagement to understand our customers' and employees' needs when making process, policy, and service-delivery decisions. We serve our customers quickly and efficiently by securely sharing and receiving information such as health records digitally and seamlessly across agencies.

We meet the changing needs of our customers and keep pace with the transitions they experience in their lives. Our customer-centric infrastructure relies on broad data exchanges and smart policies and processes. We listen to our customers and put customer choice first.

The following table highlights the fiscal years 2014 - 2018 Strategic Objectives that support our Innovative Organization Vision priority.

Table 3 - Strategic Objectives Aligned to Innovative Organization Priority

Priority	Strategic Objective
Innovative Organization	➤ [Objective 1.3] Partner with Other Agencies and Organizations to Improve Customers' Experience and Align with the Administration's One-Government Approach
	➤ [Objective 1.4] Evaluate Our Physical Footprint to Incorporate Improved Service Options
	➤ [Objective 2.1] Transform the Way We Record Earnings to Enhance Data Accuracy
	➤ [Objective 2.3] Increase Payment Accuracy
	➤ [Objective 3.1] Improve the Quality, Consistency, and Timeliness of Our Disability Decisions
	➤ [Objective 3.2] Maximize Efficiencies Throughout the Disability Program
	➤ [Objective 4.4] Enhance Planning and Alignment of Human Resources to Address Current and Future Public Service Needs
	➤ [Objective 5.1] Maintain System Performance and the Continuity of IT Services
	➤ [Objective 5.2] Enhance and Execute Plans to Modernize Our Systems
	➤ [Objective 5.3] Incorporate Innovative Advances in Service Delivery

FISCAL YEARS 2015 – 2016 MAJOR MANAGEMENT PRIORITIES

The Social Security Administration Executive Leadership team and the Executive Vision Council collaborated to identify specific management priorities for fiscal years 2015 and 2016 that focuses our efforts and resources on addressing the three vision priority areas. These management priorities serve as the first phase of implementation of [Vision 2025](#) and are critical first steps toward achievement of our aspirational vision.

Table 4 - Alignment of Major Management Priority to Vision Priority

Vision Priority	Major Management Priority
Superior Customer Experience	I. Enhance Online Customer Service
	II. Reduce the Hearings Backlog
	III. Educate the Public About Social Security Programs
Exceptional Employee	IV. Improve Succession Management
	V. Promote Employee Development and Engagement
Innovative Organization	VI. Transform the IT Investment Process
	VII. Establish Program Management Model/Office
	VIII. Accelerate the Use of Data-Driven Decision-Making

I. ENHANCE ONLINE CUSTOMER SERVICES

[Vision 2025](#) begins with the goal of a [superior customer experience](#). This goal informs everything else in the Vision. We remain fully committed to providing face-to-face services in our field offices. In our field office, we must also be responsive to the changing preferences of our customers in how they want to do business with us. Recent data indicates a considerably higher proportion of online interactions compared to the past. About 54% of all claim filings were done online in fiscal year 2015 year-to-date, as compared to nearly 42% in fiscal year 2012.

As the number of customers signing up for [my Social Security](#) grows and as the public's service expectations evolves, we have an opportunity and responsibility to offer the public a broader range of services via the Internet. We will prioritize our work efforts to ensure that our customers can access essential Social Security services whenever they want and wherever they want. That will free up time for our field office staff to address the needs of those who prefer face-to-face service or who have cases that are more complex.

We will improve options for online customers by (1) providing additional online services and (2) improving existing services. This strategy will allow our agency to provide essential information and services around the clock to those members of the public who prefer to conduct business online, allowing our frontline employees to spend more time with customers who require more personal assistance.

Expanded and more effective online access for users preferring electronic channels, along with the increased availability of technicians to better support in-person interactions, will help us significantly in achieving the goal of a [superior customer experience](#).

A few new [my Social Security](#) services include:

- [My Medicare Replacement Card \(MyMRC\)](#) - MyMRC brings the Medicare Replacement Card service behind the [my Social Security](#) portal. In the weeks after the launch of MyMRC on May 30, 2015, over 40,000 successful Medicare Replacement Card transactions occurred through [my Social Security](#).
- [Machine-Readable Downloadable statement](#) - Machine-Readable Downloadable Statement allows customers to download their Social Security Statement in XML (Extensible Markup Language) format that can be readily shared with financial advisors. To date, over 29,000 customers have successfully accessed the Machine-Readable Downloadable Statement.
- [Customer Engagement Tools \(CET\)](#) - CET is a mix of tools and new technologies that will significantly improve our ability to provide secure two-way communications with customers. New services such as Dynamic Help and Click to Callback are part of the initial rollout plan. Dynamic Help has already seen about 5,300 accesses by customers in the

first 5 days. During fiscal year 2016, we plan a further evolution in customer communications by adding Click to Chat capability, as well as a Message Center for conveying alerts.

- SmartClaim - SmartClaim will provide significantly more functionality for customers filing claims online.
- Social Security Number Replacement Card (iSSNRC) - iSSNRC provides eligible customers the ability to request replacement Social Security number cards online.
- Registration, Appointment and Services for Representatives (RASR) - RASR will allow -aAppointed representatives to perform all their Social Security business online.

II. REDUCE THE HEARINGS BACKLOG

Waiting time for hearings for disability appeals are longer than the American public deserves. Resolving this public service challenge is one of our highest priorities and crucial to providing a [superior customer experience](#).

We will reduce the hearings backlog by **improving our hearing process to make it more efficient**, and **hiring more administrative law judges to decide claims**. Increased efficiency will not come at the cost of quality. It is a business necessity and a moral imperative that we provide both timely and quality hearing decisions.

Success in reducing claims processing times will utterly transform our agency and the lives of hundreds of thousands of our customers. In addition, reducing processing times will allow employees to provide a higher quality of service to all our customers.

III. EDUCATE THE PUBLIC ABOUT SOCIAL SECURITY PROGRAMS

Every individual has a stake in the Social Security program, including the 165 million workers who contribute to the program and the more than 65 million people who currently depend on monthly Social Security benefits. However, many remain uninformed or misinformed about the programs and services that we offer. Educating the public, as well as our own employees, about Social Security, including all the benefits and services available as well as the program's critical role in the country's economic well-being, is important.

The [superior customer experience](#) outlined in [Vision 2025](#) requires an informed and engaged public. To better educate the public about our programs, we will focus on **educating the public and our employees on the full range of SSA programs and services; marketing our online services as a safe and convenient service option; and informing the conversation around the critical importance and integrity of the disability programs**.

Each employee has a role in sharing information with the public about our critical programs and services.

IV. IMPROVE SUCCESSION MANAGEMENT

To meet our customers' needs and serve them effectively, our employees must continue to grow and develop throughout their careers. The continuing process of planning and development through succession management is a critical priority and essential to our agency's future success

Our succession management strategy aligns with our [Vision 2025](#) by focusing on developing our [exceptional employees](#) throughout their careers. The strategy will be driven by transformational leadership practices and strong working relationships across the agency. We will **provide a robust training and developmental environment that supports continual learning**. Our leaders and union colleagues will **work collaboratively to ensure the agency maintains a strong pipeline of talent to meet the changing needs of our customers**.

A revamped, stronger succession planning effort will help ensure employees have developmental opportunities and support throughout their career, and that they see a clear growth path throughout their time at the agency. The success of this initiative will be contingent upon shared accountability across the agency, including executive support and individual employee commitment to self-development.

V. PROMOTE EMPLOYEE DEVELOPMENT AND ENGAGEMENT

Our employees are the heart of our agency and must have the right skills to best serve our customers when and where needed. The employee development and engagement priority aligns with our [Vision 2025](#) by focusing on empowering and supporting our greatest assets – our [exceptional employees](#).

As an integral part of achieving organizational success, we commit to **bolstering our collaborative efforts to cultivate an environment where employees know they are appreciated and respected, and revamping and improving programs for recruiting, motivating, retaining, and developing our talented workforce.**

We rely on our employees to accomplish our mission. They will notice more pathways for training, more occasions to engage with their leaders and colleagues, and more opportunities to develop and grow in their work. Proactively engaging and developing our employees on a continual basis will allow us to meet the ever-growing demands for our services.

VI. TRANSFORM THE IT INVESTMENT PROCESS

The demands for our services continue to grow at a rate that will soon outpace our resources. In order to serve our customers effectively, we must continue to emphasize efficiency and quality-enhancing technology systems. Prioritizing our investments in new technologies will help employees perform their job and move the agency toward being the [innovative organization](#) of [Vision 2025](#).

We will provide a new way to **plan, select, manage, and evaluate IT investments**. An executive investment review board will meet throughout the year to review project status and make informed investment decisions on projects that provide the greatest benefit to our mission. Transparent reporting and oversight will increase project success.

The new IT Investment Process is a collaborative effort that will help our employees properly plan and construct their IT projects. Our IT team will enable delivery of the right investments on time and within budget to provide the best possible service to our employees and the public we serve.

VII. ESTABLISH PROGRAM MANAGEMENT OFFICE

We are establishing a special office, the Enterprise Program Management Office (EPMO), to assist in supporting mission-critical projects and initiatives. The EPMO will help us realize [Vision 2025](#) by providing management oversight for high-priority agency initiatives. The EPMO is an essential part of an [innovative organization](#) and a best practice across government and private industry.

The EPMO will monitor and support the implementation of select projects and initiatives across the agency by tracking performance against plans for time and cost, evaluating risks, and assisting with corrective action plans. As a service organization, the EPMO will increase our ability to deliver high-quality results on time and within budget, provide more transparency, and maintain continuous alignment with our agency priorities.

The EPMO will assist employees in performing their work and increase our ability to optimize taxpayer dollars entrusted to our agency.

VIII. ACCELERATE THE USE OF DATA-DRIVEN DECISION-MAKING

As we move toward [Vision 2025](#), we will increase our reliance on data analytics to make more informed decisions in support of our efforts to become an [innovative organization](#).

This priority will **provide an easy-to-use integrated database that will include important agency data**. This data will provide a historic perspective that will offer insight into agency patterns and trends. The data and tools will be available to both headquarters and regional staff.

This initiative will provide the data that employees need to measure progress and manage the work that they do.

APPENDIX

Vision Priority Alignment by Strategic Objectives

Obj. #	Strategic Objective	Vision Priority
Objective 1.1	Develop and Increase the Use of Self-Service Options	Superior Customer Experience
Objective 1.2	Enhance the Customer Experience by Completing Customers' Business at the First Point of Contact	Superior Customer Experience
Objective 1.3	Partner with Other Agencies and Organizations to Improve Customers' Experience and Align with the Administration's One-Government Approach	Superior Customer Experience
Objective 1.4	Evaluate Our Physical Footprint to Incorporate Improved Service Options	Innovative Organization
Objective 2.1	Transform the Way We Record Earnings to Enhance Data Accuracy	Innovative Organization
Objective 2.2	Protect the Public's Data and Provide Secure Online Services	Superior Customer Experience
Objective 2.3	Increase Payment Accuracy	Innovative Organization
Objective 3.1	Improve the Quality, Consistency, and Timeliness of Our Disability Decisions	Innovative Organization
Objective 3.2	Maximize Efficiencies Throughout the Disability Program	Innovative Organization
Objective 3.3	Enhance Employment Support Programs and Create New Opportunities for Returning Beneficiaries to Work	Innovative Organization
Objective 4.1	Attract and Acquire a Talented and Diverse Workforce That Reflects the Public We Serve	Exceptional Employees
Objective 4.2	Strengthen the Competency, Agility, and Performance of Our Workforce to Align with the Needs of the Public	Exceptional Employees
Objective 4.3	Foster an Inclusive Culture that Promotes Employee Well-Being, Innovation, and Engagement	Exceptional Employees
Objective 4.4	Enhance Planning and Alignment of Human Resources to Address Current and Future Public Service Needs	Innovative Organization
Objective 5.1	Maintain System Performance and the Continuity of IT Services	Innovative Organization
Objective 5.2	Enhance and Execute Plans to Modernize Our Systems	Innovative Organization
Objective 5.3	Incorporate Innovative Advances in Service Delivery	Innovative Organization
Objective 5.4	Continuously Strengthen Our Cybersecurity Program	Superior Customer Experience