Securing today
and tomorrow

VISION 2025

Proudly serving Social Security customers throughout their lifetime, when and where they need us.

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Acting Commissioner's Message

As we observe the 80th Anniversary of the nation's Social Security programs, we acknowledge the legacy we are entrusted to preserve. Over the decades, generations of Americans have relied upon the care and services of our committed personnel. Today, over 65,000 Social Security employees compose our great agency, providing exemplary service to the public. It is an honor to recognize the critical role our programs play in the lives of so many individuals, for whom we are the face of the federal government.

We take considerable pride in administering benefits and providing financial protection for nearly 64 million individuals who receive almost a trillion dollars annually. These include payments to retirees, adults and children with disabilities, and surviving family members, delivering on our government's promise to maintain the welfare and protection of our people. Our rich history is founded on simple, yet profound principles, reflected in the integrity and compassion of our employees. It is this narrative and tradition upon which we will build as our agency evolves and reorients our customer-centered focus to meet the emerging service needs of the public.

As the public moves confidently into the future, we must also change the way we operate. We are compelled to anticipate the social and technical advancements that offer new ways of navigating an ever-changing society. Our challenge is to embrace technological enhancements to achieve efficiency without sacrificing the personalized service for which we are known. Toward this end, we will build a stronger, ever-capable workforce, adopt engaging and contemporary training methods, expand our information and communication technologies, and modernize our operational capabilities. Of course, we must proceed toward this rapidly changing future, mindful of many present day realities. Our budgets will undoubtedly fl ctuate, organized interests may express new agendas, social demographics will vary, and executive orders and congressional mandates will continue to affect the way we do business. Yet if we view such possibilities as opportunities, we can focus on creative solutions for meeting these challenges. Regardless of the complexities we might consider in the future, we must never disregard our customers' expectations for excellence.

Vision 2025 is our agency's call to action to preserve and fulfill our social contract, which emerged as the foundation of our agency 80 years ago, and remains a motivating force for us today. Our Vision would not exist without the invaluable contributions of our employees, managers, unions, other stakeholders, and customers, who provided a wealth of feedback through personal and virtual conversations and various open forums. Their comments provided keen insights into our existing operations and services while suggesting ways we can effectively approach the future.

I want to thank all who contributed to this endeavor and to the employees who will faithfully implement the principles outlined in Vision 2025. I am confident Vision 2025 will help us to continue serving our current customers and prepare for those we will assist in the future.

John F. Kennedy once said, "Change is the law of life and those who look only to the past or present are certain to miss the future."

Vision 2025 is our picture of the future.

Carolyn W. Colvin
Acting Commissioner

A Note From Our Chief Strategic Officer

Welcome to Vision 2025! I am excited to join Acting Commissioner Colvin in presenting our bold picture of the future to you! I especially want to echo her appreciation for your help in creating this vison. It was through your interest, engagement, thoughtful comments, and innovative ideas that it came into focus.

We met with a wide range of audiences, including customers and employees at all levels of our agency. We traveled to many areas across the country, and gained vital insight from those on the front lines serving the American public. We participated in informative discussions with our management associations, labor unions, advocacy groups, Congress, the Social Security Advisory Board, and the Office of Management and Budget, to hear their important viewpoints. We also received thousands of suggestions as we engaged virtually through video, email, social media, online discussion forums, and surveys.

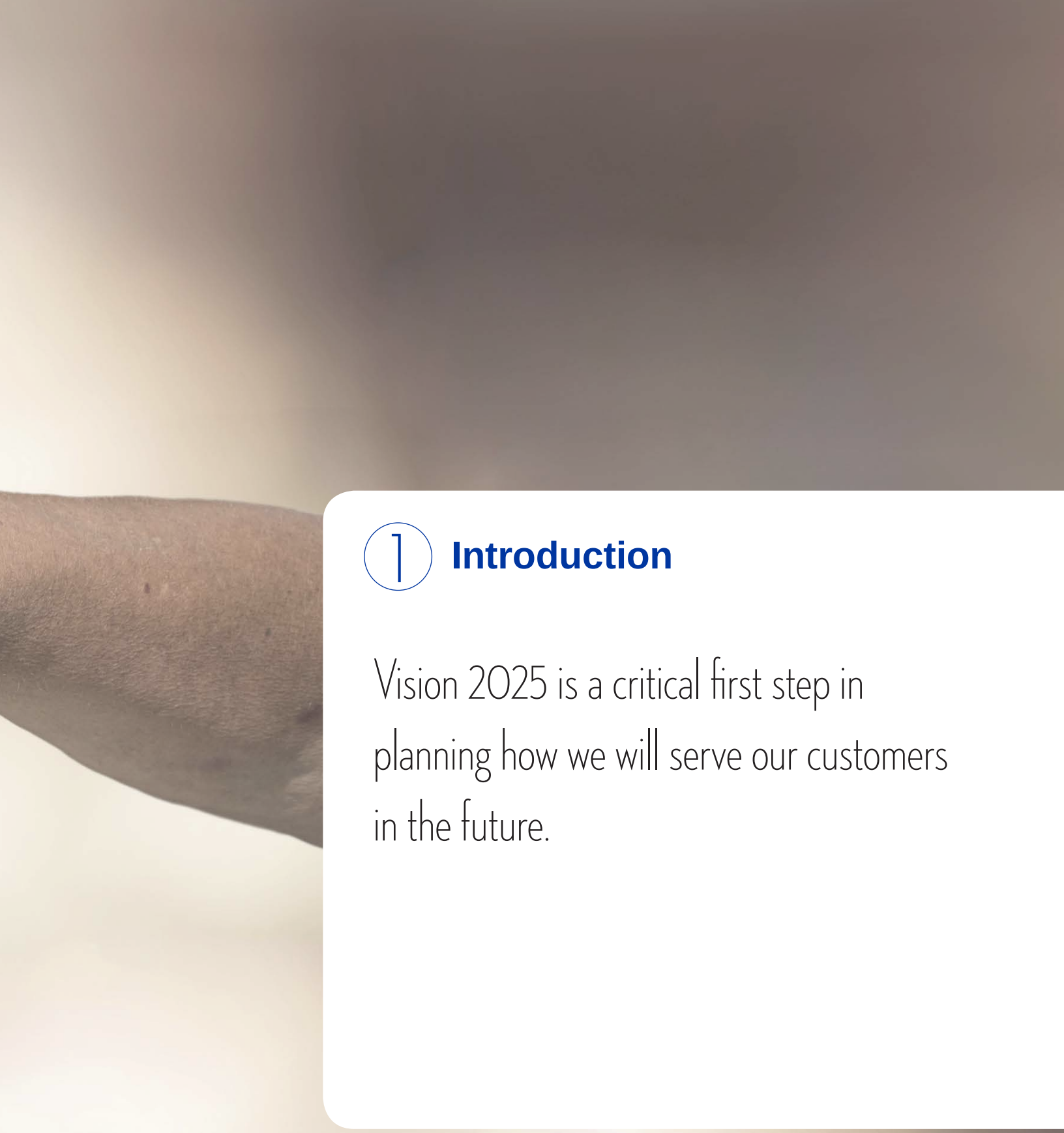
I want you to know that we heard you. Based on your input, we identified three important themes that have become our vision priorities – Superior Customer Experience, Exceptional Employees, and an Innovative Organization. Together, these priorities will serve as a “North Star” to guide our service delivery efforts in the following decade, and beyond.

So, what happens next? How does this vision become reality? As Social Security’s Chief Strategic Officer, I am responsible for ensuring that it does. One of the fi st steps toward that reality is to create a strategic roadmap extending through the next ten years. We will use our existing annual performance planning process, and our four-year agency strategic planning cycle, as the foundation for the roadmap. Our current Agency Strategic Plan already reflects several activities that align with our vision, giving us a head start on this effort. As a next step, in the coming months, I will work with other leaders in our agency to identify critical milestones and outlines for our future strategic plans. We will create working groups representing a cross-section of our

agency, including frontline managers and staff, labor unions, partner organizations, and communities. Using the mountain of feedback we have already collected and categorized, plus any new ideas, these working groups will collaborate to define the actions we must take in each of the years leading to 2025, and identify the resources we will need to support them. We will be clear and specific about our commitments, and hold ourselves accountable for delivering on them, through open and continuous communication of our progress.

I have no doubt we will be the agency we envision in 2025, providing a superior experience for our customers, creating an environment where exceptional employees thrive and excel, and becoming a truly innovative organization. Please stay in the conversation as we continue this journey. Visit our Vision 2025 website to share your comments, receive updates and to see how you can stay involved. Together, we will move Social Security to the bold new future we have imagined and described in this vision. Now, let's get started!

Ruby Burrell
Chief Strategic Officer



1 Introduction

Vision 2025 is a critical first step in planning how we will serve our customers in the future.

We have a responsibility to define customer service in the future and work to achieve our vision through this important activity and the detailed plans that will follow. Our vision was created through discussions with employees, stakeholder organizations, and customers, who know us best and have a vested interest in our future. Together we will make Vision 2025 a reality.

The Social Security Administration was founded on simple but very deep values and principles. We are a community-based organization, and in many communities we are the front door to the federal government, through which people walk during times of need. The person-to-person conversation at the center of our service-delivery model for the past 80 years is what makes Social Security unique.

Since President Roosevelt signed the Social Security Act in 1935, our agency has served the American public with distinction, delivering critical benefits to support our customers at points of transition and loss in their lives.

We are one of the largest government programs in the world, disbursing almost $1 trillion dollars in federal benefits per year – with a consistently high accuracy rate and with an administrative cost of only 1.3%.

Few government agencies touch as many lives as we do.

At Social Security, we remain true to our core principles and continue to provide critical services to those who need us most. We are committed to serving all of our customers efficiently, effectively, and compassionately, and to preserving the integrity of the Social Security programs for future generations.

Our customers reflect the full diversity of the American public in age, education, income, ethnicity, race, and ability.

Our customers are 39 million retired workers who, after a lifetime of work and contribution, rely on Social Security benefits for a portion of their income. For one out of five beneficiaries aged 65 and older, Social Security benefits are their sole source of income, and for two out of three, Social Security is half or more of their total income.[1] Our benefits help individuals and families make ends meet and provide them with independence in their elder years.

Our customers are four million children, including disabled adult children, and four million additional survivors dealing with life's most devastating losses. Our customers are nearly nine million workers who have faced a life-changing disability, leaving them unable to provide for themselves and their families. Still others are the 8.4 million elderly, blind, or individuals with disabilities, living in poverty and relying on Supplemental Security Income (SSI) to meet life's basic needs.

Our customers are Medicare beneficiaries who have either reached their senior years or become disabled. They can obtain medical treatment and services based on the contributions they have made while working, plus any necessary premiums.

Our customers are our nation's current workforce, paying into Social Security in the form of taxes on their wages and income. Our customers are employers, businesses, non-profits, advocates, oversight groups, and other stakeholders who benefit from our services and provide critical support to us and to all of our customer groups.

Finally, our customers are the dedicated and talented employees who make up our workforce. Our workforce is distributed across the American landscape in our headquarters facilities, vast network of field and hearing offices, card and payment centers, and in state disability determinations services (DDS). They are our greatest asset, and we must serve, engage, and support our employees to meet ever-changing customer expectations and workload demands.

We know the world is changing and we must change with it in order to continue to serve with distinction. While our founding principles and values will not change, the way we operate and serve must keep up with the times.

Throughout our history, our evolution has been substantial and continuous.

Over time, we have integrated new programs to support individuals with disabilities and the vulnerable. As we look toward the future, we see many challenges. Disability and retirement waves, an aging employee base, increased turnover of employees, technological advancements, fiscal constraints, and increased customer expectations present an unprecedented opportunity for bold change, innovation, and vision.

Drivers for Vision 2025

Shift in Social Security Customer Landscape

Changes in Social Security Employee Demographics and Expectations

Evolution of Social Security Service Delivery

Demand for services: As demographics shift, the population aged 65 and older will grow by more than 18 million from 2015 to 2025, and then by an additional eight million by 2030.[2] This shift will dramatically increase the demand for our services. Additionally, demand for government-to-government and business-to-government services will continue to expand.

Potential threats and opportunities: Rapid advances in technology will introduce new opportunities to serve our customers, while requiring us to remain vigilant about potential security and fraud vulnerabilities. An increase in the amount of Personally Identifiable Information transmitted online has resulted in a heightened cyber risk environment for identify theft.[3]

Evolving technology trends: Currently, 56% of Americans aged 65 or older use the internet and email regularly, compared to an overwhelming 83% of upcoming retirees (age 50-64).[4] For those younger than 44, more than 80% are already using hand held and mobile devices to access the internet.[5] By 2018, Americans will generate 241% more internet traffic than we do today.[6]

Loss of institutional knowledge: By 2020, 29% of our permanent Social Security employees will be eligible to retire,[7] and their retirement could result in various mission-critical skills gaps within the agency.

Changing employee expectations: Millennials and younger generations desire a creative and innovative work environment, but in a 2014 survey of federal employees, only one in three millennials felt those values were rewarded in their organization. Only 34% were satisfied with the opportunities they had for career advancement.[8]

Complex business processes: We must simplify Social Security policies and procedures that are creating obstacles for customers and employees and stand in the way of truly transforming our organization.

Outdated technology: Only 20% of federal leaders believe their organizations have the processes, policies, and procedures to keep pace with digital technology. Only 32% believe their stakeholders are satisfied with the way their organization engages them digitally.[9] Social Security's technology infrastructure and legacy systems are decades old and in need of replacement or repair.

Budget uncertainty: Federal budgets will continue to be constrained, which will challenge us to be innovative, efficient, and effective advocates for the resources needed to deliver the Social Security services that Americans have earned and paid for.

As we move into the future, we must ensure that any changes that we make will maintain or enhance the personal connection between our customers and our employees.

Our customers expect efficient and effective programs and services from all federal agencies, and we are committed to driving cross-government efforts that best meet our customers' changing needs. Our employees will continue to provide highly personalized service, and they will be empowered by knowledge, tools, and technology to provide expert and immediate assistance. While continuing to provide face-to-face service, we will also use technology and innovations to bring our services directly to those who need us most and remove many of the barriers to access that exist today.

Vision 2025 illustrates our commitment to our mission and to securing the trust of future generations. Join us as we take a look at your experience with our agency in 2025:

Proudly serving Social Security customers throughout their lifetime, when and where they need us.

2 Your Social Security Experience in 2025

In 2025, we provide Social Security services to our customers seamlessly throughout their lifetime.

Your Journey Begins

Our relationship with our customers begins when we assign a Social Security number, usually at birth or immigration eligibility. Initiated by a simple electronic data transfer from the hospital, federal, or state agency, we welcome them. ***my*** **Social Security** is the gateway for our customers, providing immediate and personal access to Social Security information, services, and our exceptional employees. Customers have access to their own ***my*** **Social Security** information as well as their dependents' and their children's electronic Social Security numbers. Information is appropriately linked and seamlessly presented through their secure method of choice.

Social Security Throughout Your Life Events

The journey continues when our customers start their first jobs. They use their personal ***my*** **Social Security** account to track their earnings and benefits, and verify accuracy in real-time. The account also enables access to the government as a whole. Birth, death, and other vital record information is updated in our records through seamless digital data exchanges with other organizations and agencies. We also offer program enrollments – for example, Medicare – through efficiently streamlined, secure digital services. We do not ask for information we already possess or can obtain through data-sharing with other agencies and partners.

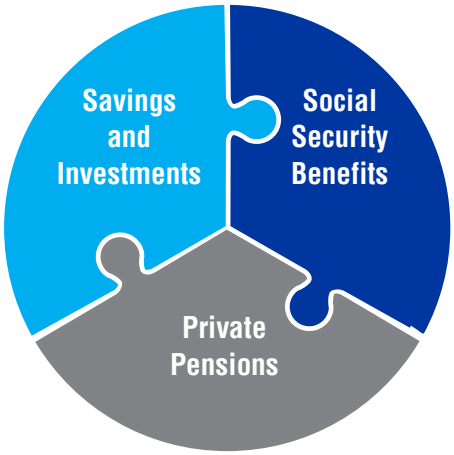
Disability and Other Situations You May Face

We understand the critical role we play when a customer experiences challenging situations. Loss of income due to death of a family member, severe disability, or other situations brings customers to us in their moments of greatest need. Our knowledgeable and compassionate employees provide them with personalized, convenient support.

Our disability and Supplemental Security Income (SSI) processes are optimized and built around Health Information Technology. Through secure, direct access to electronic medical records, we make a substantial number of our disability determinations in only one day. For determinations that may take longer to evaluate, our customers have immediate, real-time access to all of their case information as well as a detailed case status. Our appeals process is efficient and clearly communicated. Customers can communicate securely with our field, DDS, and hearings employees through ***my*** **Social Security** and participate in hearings and discussions through their choice of interactive methods. When we determine that a claimant qualifies for disability, we begin benefit payments promptly and accurately.

Preparing for Your Future and Retirement

The *my* Social Security account enables our customers to envision their future through detailed retirement benefit estimates and scenarios. This information will allow them to factor their Social Security benefits into their broader retirement picture, including savings and investments, and private pensions. Through MyData initiatives, our customers can download their personal information, as data, for their own use with other services. We also make Medicare eligibility information available through all customer service methods. When our customers retire, all they have to do is inform us of their retirement date and when they want their benefits to begin. We use their earnings information to begin providing accurate, immediate benefits.



Throughout Your Journey

Our customers access our services through their preferred method: in person at one of our field or hearing offices, by phone, over real-time video or chat, or through self-service options within *my* Social Security. Through self-service support tools, our customers can choose how and when they would like to conduct transactions and receive immediate access, support, and service. Our exceptional employees are empowered to make decisions and have support tools that enhance our service and ensure a superior experience for our customers.

3 Our Vision for 2025

Proudly serving Social Security customers throughout their lifetime, when and where they need us.

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.

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 the 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 fi st 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.

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 fi st.

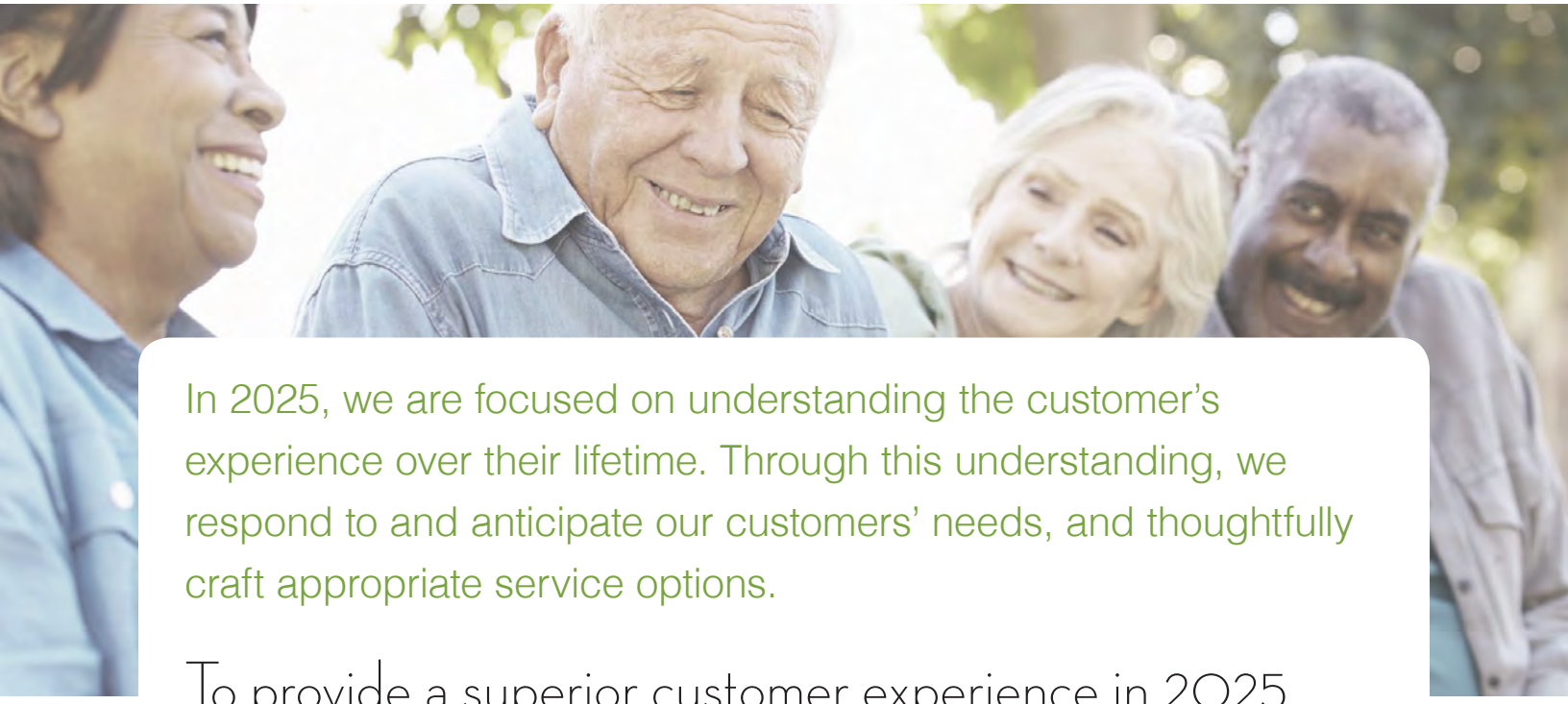
4 Our Priorities for Vision 2025

Superior Customer Experience

Exceptional Employees

Innovative Organization

Superior Customer Experience



In 2025, we are focused on understanding the customer's experience over their lifetime. Through this understanding, we respond to and anticipate our customers' needs, and thoughtfully craft appropriate service options.

To provide a superior customer experience in 2025, we have the following capabilities:

Customer Choice

In 2025, we provide highly-personalized interactions and tailored services to our customers at their point of need and in real-time. Our customers have choices in terms of when, where, and how they receive services. We satisfy an inter-generational customer base with a range of preferences in technology and interactions, by offering a variety of service delivery methods, such as in-person at our field and hearing offices, on the phone, over real-time video or chat, or by self-service. We interact responsively with our customers face-to-face, in written communications, and through digital alternatives for connecting customers to our employees for assistance.

> "SSA should provide helpful, integrated, and personalized services that meet the needs of customers, each and every time they contact SSA."
>
> – Social Security Customer

Personalized Services

We present information and appropriate service options to customers based on their needs, preferences, and relationship with our agency. Regardless of which service method they select, customers can always obtain personalized help and support. Our services are accessible to our customers regardless of language or disability. Our customer communications are written in plain language and clear, and help is always within reach. We analyze customer needs, expectations, and experiences to understand their unique requirements and preferred methods of communication. We provide a personalized experience to our customers – fully meeting their expectations.

Customer-Centric Technology

Our customers have choices in when and where they access our services. For those customers who choose self-service options, we design our technology to support the ultimate goal of providing a seamless, superior customer experience across all methods of contact. From better computer-telephone integration to systems designed around our customers as individuals – not as cases or claims – we invest in the right technology to better understand our customer's life journey and create the personalized, relevant and efficient experience customers need. We prioritize our technology investments based on customer needs, ease of use, and improving access to our services, and work to eliminate antiquated systems.

Accurate Information

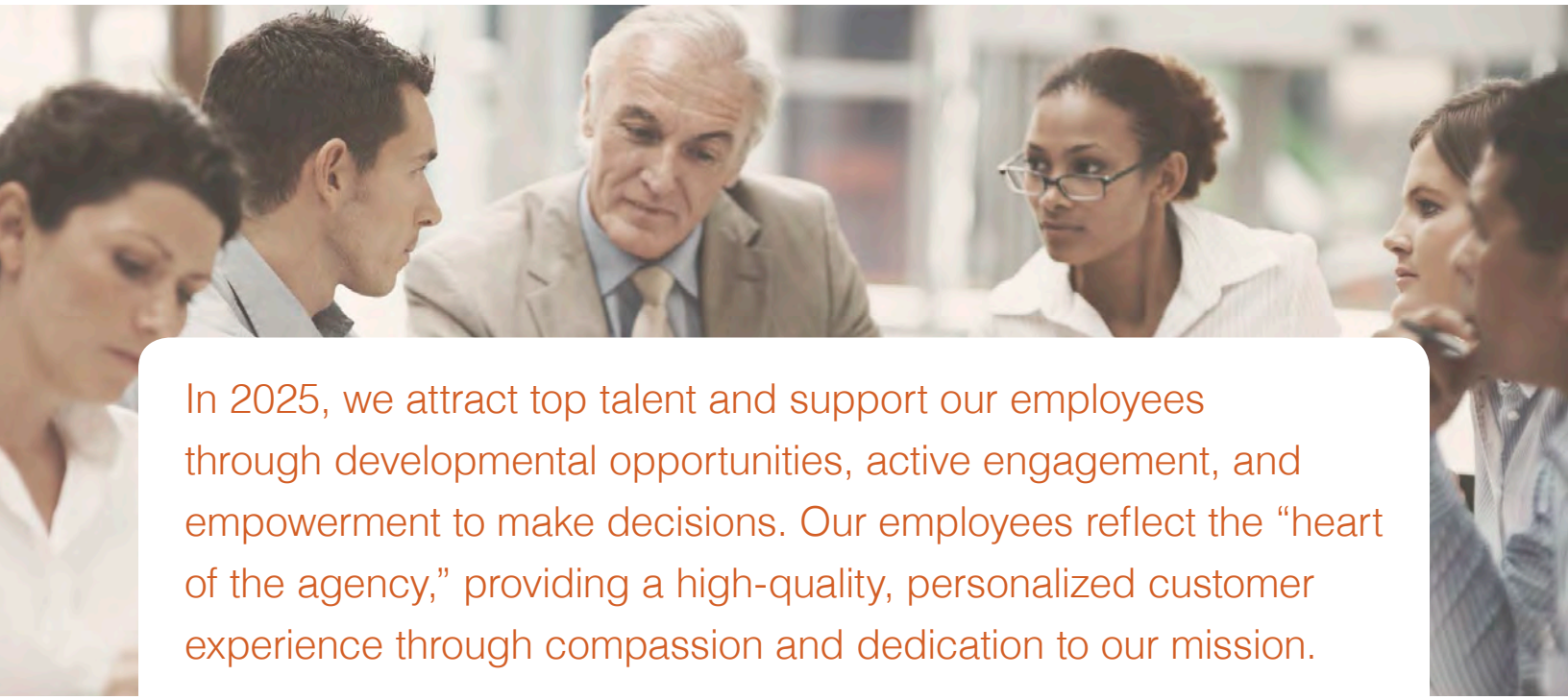
Our customers expect a high level of performance and accuracy in their interactions with Social Security services. When customers access their data or when they interact with our employees, they can rest assured that their information is accurate, safeguarded from theft or fraud, and is up-to-date, thus enabling the best, real-time decisions regarding their benefits.

> "Social Security needs to let me apply and check the status of my case online. That would speed up wait times at your office and on the phone when I have a question and need to talk a person."
>
> – Social Security Customer

Secure Systems

Our customers are confident their personal information is protected, no matter which method of service they select. We incorporate leading cybersecurity practices and real-time identity verification into all technology and systems. With the right technologies and permissions in place, our customers and employees conduct business seamlessly and securely. We vigilantly monitor our systems for specific network vulnerabilities, threats, and larger-scale events in our digital environment as part of our cybersecurity strategy, and we are able to quickly address weaknesses and prevent cyber intrusions.

Exceptional Employees



In 2025, we attract top talent and support our employees through developmental opportunities, active engagement, and empowerment to make decisions. Our employees reflect the "heart of the agency," providing a high-quality, personalized customer experience through compassion and dedication to our mission.

To support our exceptional employees in 2025, we have the following capabilities:

Attracting and Cultivating Top Talent

We directly recruit and hire compassionate people who are drawn to public service and have a desire to improve the lives of our customers. As an employer of choice, we attract and retain employees who are committed to our mission, reflect the full diversity of the public we serve, are connected to their local communities, and are dedicated to providing quality customer service. We place a high priority on career growth and developing future leaders. We grow our employees' expertise and skillsets through targeted training that provides opportunities for personal and professional advancement. We access additional talented people through collaborations with universities, internship programs, inter-agency partnerships, and agency-wide developmental and rotational programs.

> "SSA should work collaboratively with labor at all levels of the agency. We are eager to work with SSA to enhance customer service to ensure full customer choice."
>
> – National Council of SSA Field Operations Locals

Employee Development

Our employees have access to a wide range of professional development opportunities. Our results-based performance management system rewards high performance and incorporates well-defined and clearly-communicated standards for success. Employees receive meaningful individualized feedback on a continual basis to guide their development. Our employee-centered programs foster skills development and facilitate knowledge transfer. We assess training needs at the organizational level as well as the individual level, as our programs continually improve. Our training programs are dynamic, address critical skill gaps, and are crafted and adjusted according to our vision.

Employee Engagement

Our employees' sense of purpose is evident in their display of dedication, persistence, and effort in their work, and they exhibit an overall attachment to our organization and its mission. Our employees are proud to be members of an organization that serves our customers' needs and is innovative, and offers a work environment where individual differences are valued and employees are treated with dignity and respect. Employees see their work more as a "calling" than a job. Our employees are committed to customer service throughout their careers and we value their growth in this mission. We consistently seek their input and ideas on service and program innovation. We offer an environment of high trust, where employees feel they are an integral part of the agency's operations, policy development, and decision-making. Regardless of their location or job title, our employees unite behind a common goal: to improve the lives of our customers.

Employee Empowerment

Our dedicated employees are able to balance career and life needs and goals. They are empowered to make timely decisions while serving external and internal customers, and have opportunities to participate in cross-government initiatives. Our streamlined business processes remove unnecessary hand-offs and truly facilitate "one-stop-service." Employees are able to grow as experts in handling complex customer situations with the support of innovative technologies, such as online services and a customer-centric view. Access to advanced portable technologies provides flexibility to our employees, empowering them to serve Social Security customers from various locations in a way that accommodates their personal lives.

Decision Support Tools

Employees are equipped with effective tools and resources providing direct access to accurate information and the ability to provide a superior customer experience in real-time. Seamlessly integrated systems enable employees to see a single view of customer information to address their needs in an accurate and timely manner. Our flexible and automated tools are designed to support Social Security programs by integrating policy, process, and data into our systems to support our knowledgeable employees. Innovative technologies reduce the margin for human error and support the employee with real-time, accurate information. Knowledge-sharing is institutionalized across the organization to retain crucial knowledge when employees make career changes.

"Social Security employees are exceptional public servants and need a career path for professional growth and exciting new opportunities."

– ODAR Forum Union Officials

Innovative Organization

In 2025, we are recognized by the public and across government for our agility and effectiveness in fulfilling our mission. We meet the changing needs of our customers and keep pace with the transitions they experience in their lives.

To sustain an innovative organization in 2025, we have the following capabilities:

Customer-Centric Infrastructure

Our 2025 organizational structure is driven by customer needs and designed around customer preferences, which include a local community presence. Our agency's infrastructure provides greater workplace flexibility while providing immediate access to our knowledgeable employees. Our organizational structure aligns our resources to best serve our customers and sustain an engaging and innovative work environment.

Data-Driven Culture

We understand and design the entire customer experience by relying on data and analytics tools to improve our processes, policies, and service delivery. By capturing and evaluating historical data, we use predictive analytics to identify and model the future needs of our customers. Increased Open Data information about our programs and performance leads to better informed customers who are able to help us improve services. Our employees have access to real-time, comprehensive data to help us better serve our customers. Data management, business intelligence, and analytics tools enhance quality and performance.

Continuous Improvement

We routinely evaluate how we deliver services to our customers based on their changing needs. Customer and employee feedback drives continuous improvement, and we share best practices in real-time to sustain superior customer service. Through analysis of our business processes, we identify opportunities to reduce areas of inefficiency or inadequacy, including processes that are obsolete, under-performing, high-risk, or ineffective. We use customer input to expand, modify, and implement a wide range of service options to meet their diverse needs and preferences. Our operating environment is flexible and takes into account constantly changing workloads and our unique customer base.

> "Make it more convenient for customers to do business with SSA, whenever and however they choose."
>
> – National Council of Social Security Management Associations

Smart Rules, Policies, and Procedures

Our program rules are simplified to provide clear meaning for both customers and employees, thus enabling efficient processing of benefits. We routinely review regulations and policies to remove outdated provisions that have outlived their usefulness. Our more flexible decision-making and greater efficiency is driven by a simplification of our internal and external processes. We regularly engage internal and external stakeholders to evaluate and evolve policy. Through our strong understanding of the customer's life journey and by focusing on changes in the larger environment, we are recognized as a leader in social insurance policy. We are committed to providing accurate, high-quality public policy research to help shape the future of our programs and support the creation of sound policy.

Fraud Detection

The Social Security Administration leads the federal government in the use of advanced techniques to identify fraudulent behavior. We continuously monitor our transactions to identify those that demonstrate intent to defraud us. We respond quickly and decisively to prevent and detect fraud, to collect money stolen from the American taxpayers, and to prosecute the perpetrators. We demonstrate that we have zero tolerance for fraud. Our information exchanges lead in being the most secure in government and the private sector. We model the best practices in cybersecurity and fraud prevention. As a result, we have our customers' trust.

Program Integrity

Real-time earnings reports and timely information enable us to make the right payments at the right time, thus preventing over- and under-payments. Technology and data analytics give us faster access to more and better data. We have also streamlined our processes and procedures to minimize errors. We continuously monitor our transactions for potential program abuse to respond quickly to the possibility of incorrect payments. Our customers have access to secure real-time information through the method of their choice, with new ways to access and share information. Our customers understand their reporting responsibilities and they report changes through the method of their choice, including in field offices, electronically, and over the telephone. We emphasize the importance of preventing underpayments, recognizing that we serve the most vulnerable in our society and our payments are often their only or major source of income.

Health Information Technology Integration

We receive electronic health records to fully adjudicate disability cases and significantly expedite claims processing. We are able to assess individuals' conditions and program eligibility statuses continuously through our ability to retrieve and evaluate medical records automatically. We are able to significantly improve decision-making and information accuracy, and have eliminated the hearing backlog for our disability customers. Our employees have access to information required to make smart and well-informed determinations and administer accurate payments. Claims are processed quickly and accurately.

> "Social Security should be organizationally flexible and challenge the status quo to embrace new technologies around data integration and Health IT."
>
> – Social Security Executive

Inter-Organization Data-Sharing

We lead multiple data exchange communities of practice across government, working collectively to anticipate the data needs of customers and employees. We partner with federal, state, local, tribal, and international government partners, as well as the private sector, to receive and share data in a secure and seamless manner. Our data-sharing activities supply accurate, relevant and real-time data to prevent improper payment and ensure integrated customer service for social insurance programs and external partners.

5 The Path to 2025: Our Enablers

We will achieve our vision through careful strategic planning and implementation efforts.

Our priorities – a superior customer experience, exceptional employees, and an innovative organization – require a set of initiatives to realize our vision. The following enablers will guide the future strategic planning, resource investment decisions, and budget requests needed to make Vision 2025 our future reality.

Customer Experience Focus

A comprehensive customer strategy will drive our understanding of customer needs and preferences throughout our organization.

We will develop a comprehensive approach to understanding and staying ahead of our customers' preferences and needs. Through strategic outreach, transparent communication, superior service channel offerings and support tools, and flexible delivery capabilities, we will facilitate high-quality, personalized, and comprehensive interactions. The customer strategy will include a plan to drive accountability around customer service by engaging customers and regularly assessing their needs.

> "The most important measure of Social Security customer service delivery is First Contact Resolution."
>
> – Social Security Employee

Employer of Choice

We will attract and retain dedicated public servants and give them all the support they need to provide world-class service.

The Social Security Administration is currently one of the top ten best places to work among large federal agencies. As an employer of choice, we implement human resource management best practices and work with our labor unions to develop an effective talent management and rewards strategy. As a result, we will create an environment where we recruit, retain, and reward our exceptional employees. We empower our employees to make decisions and innovate. We will engrain informed risk-taking and continuous improvement in our culture, and welcome both as positive contributions. Our talent management strategy will also include an evaluation of our current accountability structure and our recognition and rewards methods.

Business-Driven Integrated Systems

We will make informed, strategic choices regarding Information Technology (IT) to create seamlessly integrated systems across all levels of the organization, increasing accessibility, accuracy, and ease of use.

We will institute a more agile approach to implementing technology, resulting in faster development cycle time. Through the creation of a network of integrated internal systems, we will operate as a unified organization, sharing information and using data across service areas and teams. Our IT investment approach will reflect prioritization of our current and emerging business needs. We will also reevaluate our current portfolio of IT projects against the capabilities defined in Vision 2025 and assess the policies, rules, and technologies currently hindering integration. We then will develop a plan and investment strategy for our path forward.

Strong Internal Working Relationships

We will have strong working relationships, both across component lines and with our management associations and labor unions.

To reach our shared vision of a superior customer experience, exceptional employees, and an innovative organization, we will work together in a spirit of common purpose, respect, and inclusion. Both union and management leaders demonstrate strategic foresight in working together on solutions that are beneficial to employees, the public we serve, and the agency.

Transformational Leadership

Our leaders inspire our employees, promote innovation, and transform the agency to meet the changing needs of our customers and employees.

Successful implementation of Vision 2025 depends on the innovative and collaborative efforts of leaders at all levels of our agency. Our leaders will understand the needs of our customers and employees, and move towards innovative solutions that position the agency for continued success. Our leaders will work across the organization toward a common vision and deliver comprehensive solutions. They will continually grow as leaders and adapt to innovations and leading practices. They will regularly challenge the status quo and remove initiatives that are not aligned with the agency strategic direction. We will implement new ways for our leaders to engage in strategic planning to identify solutions, prioritize initiatives, measure the right efforts, and hold ourselves accountable for achieving this vision and related successes.

Evolving Policies and Processes

Continual evaluation of policies, regulations, and processes enables efficient and effective operations and reflects current societal needs.

We will continually evaluate policies and procedures and propose changes to keep pace with medicine, technology, and the world of work in our disability programs. We will explore issues of benefit equity and adequacy across our programs, and work with Congress to strengthen our programs for the future. We will work to simplify and streamline policies and procedures, and to provide high-quality public policy research to help shape the future of our programs.

Infrastructure Alignment and Collaboration

We are aligned to most efficiently meet our customer and business needs.

We will align our physical infrastructure and workforce distribution to the current environment, as we keep up with evolving technologies and our customers' needs for our continuing community presence. Our current physical infrastructure assets and workforce distribution across the field and hearing office, and headquarters landscape will be continuously improved as we realize our vision to provide customer choice. We will invest in appropriate infrastructure, technology, and capabilities, and put our people in the right places with the right tools to meet customer needs. We will also increase collaboration across state and federal agencies to improve customer service and capitalize on existing facilities planning resources.

26%
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$300
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Aug.

6 Appendix

Capabilities and Enablers Crosswalk

The charts below illustrate how the enablers identified will support each of the three Vision priorities and their related capabilities.

Superior Customer Experience

Capability	Enabler						
	Customer Experience Focus	Employer of Choice	Business-Driven Integrated Systems	Strong Internal Working Relationships	Leadership	Evolving Policies and Processes	Infrastructure Alignment
Customer Choice	✓	✓	✓		✓	✓	✓
Personalized Services	✓		✓	✓	✓		
Customer-Centric Technology	✓		✓	✓			
Accurate Information			✓	✓		✓	
Secure Systems			✓				

Exceptional Employees

Capability	Enabler						
	Customer Experience Focus	Employer of Choice	Business-Driven Integrated Systems	Strong Internal Working Relationships	Leadership	Evolving Policies and Processes	Infrastructure Alignment
Attracting and Cultivating Top Talent		✓		✓	✓		✓
Employee Development	✓	✓		✓	✓		
Employee Engagement		✓		✓	✓	✓	✓
Employee Empowerment		✓	✓	✓	✓	✓	✓
Decision Support Tools			✓				

Innovative Organization

Capability	Enabler						
	Customer Experience Focus	Employer of Choice	Business-Driven Integrated Systems	Strong Internal Working Relationships	Leadership	Evolving Policies and Processes	Infrastructure Alignment
Appropriate Infrastructure	✓		✓	✓	✓	✓	✓
Data Driven Culture			✓	✓	✓	✓	✓
Continuous Improvement	✓	✓	✓	✓	✓	✓	✓
Smart Rules, Policies, and Procedures	✓	✓		✓	✓	✓	
Fraud Detection			✓				
Program Integrity			✓				
Health IT Integration			✓		✓	✓	
External Data Exchanges			✓		✓	✓	

Agency Strategic Plan (ASP) Crosswalk

The charts below illustrate how on-going initiatives, as part of the current ASP (2014-2018), align and support the enablers for Vision 2025. For each enabler, the aligned ASP goal, objective, and on-going initiatives are listed.

ASP Strategic Objectives

Customer Experience Focus

A comprehensive customer strategy will drive our understanding of customer needs and preferences throughout our organization.

ASP Goal	Objective	Initiative
Goal 1: Deliver Innovative, Quality Services	1.1 Develop and increase the use of self-service options	• Expanding online access through Social Security Express • Leveraging my Social Security • Expanding our nationwide marketing campaign • Enhancing iAppeals
	1.2 Enhance the customer experience by completing customers' business at the first point of contact	• Implementing online Social Security Number card application • Establishing Social Security Electronic Remittance System • Increase video hearings • Expanding video service delivery • Highlight Section 504 • Providing real-time assistance to online users
	1.3 Partner with other agencies and organizations to improve customers' experience and align with the administration's one-government approach	• Expand our partnership with external organizations • Expanding the Virtual Lifetime Electronic Records • Strengthening the Social Security Number application process
Goal 2: Strengthen the Integrity of our Programs	2.1 Transform the way we record earnings to enhance data accuracy	• Continue earnings redesign • Increasing electronic wage report filin • Accessing the Social Security Statement
	2.2 Protect the public's data and provide secure online services	• Deploy management system for Personally Identifiabl Information and Federal Tax Information
	2.3 Payment accuracy	• Promoting use of the Supplemental Security Income telephone wage reporting system and the Supplemental Security Income mobile wage reporting • Conducting Continuing Disability Reviews • Conducting Supplemental Security Income redeterminations • Implementing direct deposit auto-enrollment fraud prevention

ASP Goal	Objective	Initiative
Goal 3: Serve the public through a stronger, more responsive disability program	3.2 Maximize efficiencies throughout the disability program	• Using Health Information Technology to expedite disability decisions
	3.3 Enhance employment support programs and create new opportunities for returning beneficiaries to wor	• Improving employment support programs • Improving employment support outreach to targeted working-age beneficiarie

Employer of Choice

We will attract and retain dedicated public servants and give them all the support they need to provide world-class service.

ASP Goal	Objective	Initiative
Goal 1: Deliver innovative, quality services	1.2 Enhance the customer experience by completing customers' business at the first point of contact	• Increase video hearings • Expanding video service delivery
Goal 3: Serve the public through a stronger, more responsive disability program	3.1 Serve the public through a stronger, more responsive disability program	• Enhancing the Electronic Claims Analysis Tool • Expanding use of Electronic Bench Book

ASP Goal	Objective	Initiative
Goal 4: Build a model workforce to deliver quality service	4.1 Attract and acquire a talented and diverse workforce that reflects the public that we serv	• Focusing on employment of veterans and individuals with disabilities • Highlighting the Pathways Programs (for students and recent graduates to federal careers)
	4.2 Strengthen the competency, agility, and performance of our workforce to align with the needs of the public	• Creating management training • Reducing skills gaps • Focusing on career development programs • Using GovProject to share talent across our agency • Enhancing our Human Resources Services Portal • Marketing availability of on-demand training and development • Supporting employees through mentoring
	4.3 Foster an inclusive culture that promotes employee well-being, innovation, and engagement	• Improving the employee satisfaction action plan • Creating management and labor forum meetings and pre-decisional involvement opportunities • Highlighting diversity and inclusion • Supporting work-life balance
	4.4 Enhance planning and alignment of human resources to address current and future public service needs	• Implementing HRStat review process • Using applicant flow dat • Implementing the Human Capital Operating Plan • Retirement wave analysis
Goal 5: Ensure reliable, secure, and efficient information technology services	5.3 Incorporate innovative advances in service delivery	• Enhancing our National 800 Number infrastructure • Expanding video conference capabilities throughout the agency

Business-Driven Integrated Systems

We will make informed, strategic choices regarding IT to create seamlessly integrated systems across all levels of the organization, increasing accessibility, accuracy, and ease of use.

ASP Goal	Objective	Initiative
Goal 1: Deliver innovative, quality services	1.1 Develop and increase the use of self-service options	• Expanding online access through Social Security Express • Leveraging my Social Security • Enhancing iAppeals
	1.2 Enhance the customer experience by completing customers' business at the first point of contact	• Implementing online Social Security Number card application • Highlight Section 504 • Providing real-time assistance to online users
	1.3 Partner with other agencies and organizations to improve customers' experience and align with the administration's one-government approach	• Expanding the Virtual Lifetime Electronic Records
Goal 2: Strengthen the Integrity of our Programs	2.1 Transform the way we record earnings to enhance data accuracy	• Deploy management system for Personally Identifiabl Information and Federal Tax Information • Producing a public-facing integrity review • Jump-starting predictive analytics for disability fraud
	2.3 Payment accuracy	• Conducting Continuing Disability Reviews • Conducting Supplemental Security Income redeterminations • Use predictive modeling in Continuing Disability Review enforcement operation • Use predictive modeling in the redetermination process • Improving the death reporting system process • Implementing data exchange and verification onlin • Implementing direct deposit auto-enrollment fraud prevention • Implementing new tools for debt collection • Implementing automatic earnings reappraisal operation delay pilot

ASP Goal	Objective	Initiative
Goal 3: Serve the public through a stronger, more responsive disability program	3.1 Improve the quality, consistency, and timeliness of our disability decisions	• Enhancing the Electronic Claims Analysis Tool • Expanding use of Electronic Bench Book
	3.2 Maximize efficiencie throughout the disability program	• Developing the Disability Case Processing System • Using Health Information Technology to expedite disability decisions
	3.3 Enhance employment support programs and create new opportunities for returning beneficiarie to work	• Improving employment support programs
Goal 4: Build a model workforce to deliver quality service	4.1 Attract and acquire a talented and diverse workforce that reflect the public that we serve	• Focusing on employment of veterans and individuals with disabilities • Highlighting the Pathways Programs (for students and recent graduates to federal careers)
	4.2 Strengthen the competency, agility, and performance of our workforce to align with the needs of the public	• Creating management training • Reducing skills gaps • Focusing on career development programs • Using GovProject to share talent across our agency • Enhancing our Human Resources Services Portal • Marketing availability of on-demand training and development • Supporting employees through mentoring
	4.3 Foster an inclusive culture that promotes employee well-being, innovation, and engagement	• Improving the Employee Satisfaction Action Plan • Creating management and labor forum meetings and pre-decisional involvement opportunities • Highlighting diversity and inclusion • Supporting work-life balance
	4.4 Enhance planning and alignment of human resources to address current and future public service needs	• Implementing HRStat review process • Using applicant flo data • Implementing the Human Capital Operating Plan • Retirement wave analysis
Goal 5: Ensure reliable, secure, and efficient information technology services	5.3 Incorporate innovative advances in service delivery	• Enhancing our National 800 Number infrastructure • Expanding video conference capabilities throughout the agency

Strong Internal Working Relationships

We will have strong working relationships, both across component lines and with our management associations and labor unions.

ASP Goal	Objective	Initiative
Goal 4: Build a model workforce to deliver quality service	4.2 Strengthen the competency, agility, and performance of our workforce to align with the needs of the public	• Creating Management Training • Focusing on Career Development Programs • Using GovProject to Share Talent Across Our Agency • Supporting Employees Through Mentoring
	4.3 Foster an Inclusive Culture that Promotes Employee Well-Being, Innovation, and Engagement	• Improving the Employee Satisfaction Action Plan • Creating Management and Labor Forum Meetings and Pre-decisional Involvement Opportunities • Highlighting Diversity and Inclusion
	4.4 Enhance Planning and Alignment of Human Resources to Address Current and Future Public Service Needs	• Implementing the Human Capital Operating Plan

Transformational Leadership

Our leaders inspire our employees, promote innovation, and transform the agency to meet the changing needs of our customers and employees.

ASP Goal	Objective	Initiative
Goal 4: Build a model workforce to deliver quality service	4.2 Strengthen the competency, agility, and performance of our workforce to align with the needs of the public	• Creating management training • Focusing on career development programs

Evolving Policies and Processes

Continual evaluation of policies, regulations, and processes enables efficient and effective operations and reflects current societal needs.

ASP Goal	Objective	Initiative
Goal 1: Deliver innovative, quality services	1.1 Develop and increase the use of self-service options	• Leveraging my Social Security
	1.2 Enhance the customer experience by completing customers' business at the first point of contact	• Implementing online Social Security Number card application • Increase video hearings • Expanding video service delivery • Highlight Section 504
	1.3 Partner with other agencies and organizations to improve customers' experience and align with the administration's one-government approach	• Expanding the Virtual Lifetime Electronic Records • Strengthening the Social Security Number application process
Goal 2: Strengthen the Integrity of our Programs	2.1 Transform the way we record earnings to enhance data accuracy	• Continue earnings redesign • Increasing electronic wage report filin • Accessing the Social Security Statement
	2.3 Payment accuracy	• Conducting Continuing Disability Reviews • Use predictive modeling in Continuing Disability Review enforcement operation • Use predictive modeling in the redetermination process • Expanding the Access to Financial Institutions initiative • Expanding our Cooperative Disability Investigation program • Improving the death reporting system process • Implementing direct deposit auto-enrollment fraud prevention • Implementing new tools for debt collection • Implementing automatic earnings reappraisal operation delay pilot

ASP Goal	Objective	Initiative
Goal 3: Serve the public through a stronger, more responsive disability program	3.1 Improve the quality, consistency, and timeliness of our disability decisions	• Enhancing the Electronic Claims Analysis Tool • Expanding use of Electronic Bench Book • Developing an Occupational Information System • Updating the medical listing of impairments • Conducting inline quality reviews • Reducing the backlog at the Appeals Council
	3.2 Maximize efficiencies throughout the disability program	• Developing the Disability Case Processing System • Using Health Information Technology to expedite disability decisions
	3.3 Enhance employment support programs and create new opportunities for returning beneficiaries to wor	• Improving employment support programs • Improving employment support outreach to targeted working-age beneficiarie
Goal 4: Build a model workforce to deliver quality service	4.2 Strengthen the competency, agility, and performance of our workforce to align with the needs of the public	• Enhancing our Human Resources Services Portal
	4.4 Enhance planning and alignment of human resources to address current and future public service needs	• Implementing HRStat review process • Using applicant flow dat • Implementing the Human Capital Operating Plan • Retirement wave analysis
Goal 5: Ensure Reliable, Secure, and Efficient Information Technology Services	5.1 Maintain system performance and the continuity of information technology services	• Enhancing our infrastructure • Maintaining systems performance while transitioning to the National Support Center • Improving information technology cost and performance
	5.2 Enhance and execute plans to modernize our systems	• Modernizing older software applications • Improving information technology governance and architectural planning
	5.3 Incorporate innovative advances in service delivery	• Enhancing our National 800 Number infrastructure • Expanding video conference capabilities throughout the agency
	5.4 Continuously strengthen our cyber security program	• Protecting our systems and data • Implementing Audit Trail System New Architecture Phase II • Implementing information security program

Infrastructure Alignment

Our workforce and physical infrastructure are aligned to meet most efficiently our customer and business needs.

ASP Goal	Objective	Initiative
Goal 1: Deliver innovative, quality services	1.1 Develop and increase the use of self-service options	• Expanding online access through Social Security Express • Leveraging my Social Security
	1.2 Enhance the customer experience by completing customers' business at the first point of contact	• Increase video hearings • Expanding video service delivery
	1.3 Partner with other agencies and organizations to improve customers' experience and align with the administration's one-government approach	• Expand our partnership with external organizations
Goal 2: Strengthen the Integrity of our Programs	2.1 Transform the way we record earnings to enhance data accuracy	• Accessing the Social Security Statement
Goal 4: Build a model workforce to deliver quality service	4.3 Foster an inclusive culture that promotes employee well-being, innovation, and engagement	• Supporting work-life balance
Goal 5: Ensure reliable, secure, and efficient information technology services	5.1 Maintain system performance and the continuity of information technology services	• Enhancing our infrastructure • Maintaining systems serformance while transitioning to the National Support Center
	5.2 Enhance and execute plans to modernize our systems	• Modernizing older software applications
	5.3 Incorporate innovative advances in service delivery	• Enhancing our National 800 Number infrastructure • Expanding video conference capabilities throughout the agency

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