



*Education Leaders in the VA:  
The Role of the Designated Education Officer (DEO)*



DEO Role Profile

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## ***Introduction and Background***

Prior to 1994, education leadership positions were centralized and “vetted” through the Veteran’s Health Administration (VHA) Office of Academic Affiliations (OAA). With reorganization to Veterans Integrated Service Networks (VISNS), education leadership positions were decentralized, and facilities had varying ways of ensuring adequate leadership at the local level for staff and clinical trainees. By the early 2000’s, nearly 60 education titles existed for these roles. To ensure adequate leadership at the local level, meet various program accreditation standards, and begin to define oversight responsibilities for clinical trainees the concept of a Designated Education Officer (DEO) was established. The DEO is responsible for ensuring the administration and oversight of clinical trainee programs at VA Medical Centers. In some facilities the DEO may be called the Associate Chief of Staff for Education (ACOS/E). Administration and oversight of staff learning needs are conducted by a Designated Learning Officer (DLO) or Chief Learning Officer. Some facilities have the ACOS/E serve as both the DEO and DLO depending on size and complexity.

In this context in November of 2007, VHA endorsed a long-term transformational performance goal to “distinguish VHA as a Learning Organization.” The goal is aimed at transitioning VHA from the prior state of traditional, mandatory and compliance driven education to one that integrates learning into the work of the organization and drives performance.

Learning organizations are effective organizations because they:

- Foster innovation
- Increase the ability of the organization to manage change
- Improve quality and performance
- Increase employee satisfaction
- Improve retention
- Develop a more committed and engaged workforce

## ***Learning Leader Competency Project***

The T-4 transformational goal (2011) prompted the need to create a new profile for Learning Leaders across VHA. The role of learning leaders, including the Designated Learning Officer (DLO) and the Designated Education Officer (DEO), is critical to supporting the mission of the VA.

### **DEO Role Description:**

The Designated Education Officer (DEO) or Associate Chief of Staff for Education (ACOS/E) is a facility-based learning leader with oversight, responsibility, and accountability for all accredited and affiliated clinical trainee programs within that facility. The DEO maintains the quality of the relationships with affiliates and a positive, effective local learning environment. Thus, the DEO contributes to the quality of health care for Veterans and the nation.

# ***DEO Role Description***

## **Additional DEO Role Background:**

- VA has the statutory mission to provide health professions education, resulting in beneficial outcomes for Veterans, trainees, VA, and the nation. Excellent health professions training results in the development of future health professionals who are well prepared to care for Veterans, enhances VA's own recruitment and retention of highly qualified staff, and creates an environment of teaching, learning and inquiry that fosters the delivery of high quality, evidence-based care. Over the past 10 years, the training mission in VA has become more complex and has attracted increasing scrutiny from external entities, such as Office of Inspector General (OIG), Government Accounting Office (GAO) and others. To ensure the highest quality education, to provide strong oversight of educational processes, and to guide the relationship between the facility's training goals with other operational issues, each facility must provide for the creation of a facility-based education leader known as the Designated Education Officer (DEO).
- The title of DEO was first written into VA policy on resident supervision in 2005, to provide a uniform focal point and point of contact for responsibility for management of certain aspects of management of affiliated training programs. The DEO operates with a functional description similar to that used by Accreditation Council for Graduate Medical Education (ACGME), where each institution sponsoring physician resident programs is required to have a Designated Institutional Official (or "DIO"). DEO is a functional title, not an organizational title. In VA complexity level 1 and 2 facilities, the ***preferred organizational title*** is **Associate Chief of Staff for Education (ACOS/E)** or similar designation to reflect the key organizational role of this individual. Other possible titles include the Director of Education, Chief Education Officer, or Chief, Education Office. Facilities take into account local needs, staffing, and number of trainees when determining if it is necessary to have both a DEO (oversight of trainee education) and DLO (oversight of staff education and workforce development). In many facilities, the role of DEO is only one of the several roles the Associate Chief of Staff for Education may perform. In some instances (e.g. smaller facilities) the DEO may serve also as the DLO.
- Office of Academic Affiliations (OAA): OAA supports the statutory mission of "health professions education for VA and the Nation". OAA oversees the strategies, policies, and procedures that support over 125,000 trainees receiving clinical training in the system every year and provides policy and direction for issues pertaining to affiliation relationships, trainee functions and accreditation, stipend management, and trainee supervision. DEOs serve as OAA's primary point of contact at the facility level and focal point for communication of initiatives, issues, and policy from VHA/OAA.
- The DEO should regularly assess educational resources at the local facility and advocate for appropriate resources.
- At the local level (including parent and outpatient facilities), ensuring trainees are properly appointed, evaluated, trained, and appropriately supervised are primary DEO responsibilities. The DEO should be familiar with relevant education Directives/Handbooks (1400 series and other Human Resources policy), participate in national and VISN education calls, and attend OAA sponsored educational conferences and

trainings. In conjunction with other local leaders, the DEO oversees relationships with a wide variety of professional schools, such as medical schools, dental schools and nursing schools, and participate in GME committees at their major affiliates. Participation in the local management of trainee funding is another vital function, which includes oversight of the administration of trainee stipends, resident activity reporting, affiliation agreements, educational cost contracts, resident rate schedules, program letters of agreement, and disbursement agreements. The DEO is expected to update these documents according to OAA Directives/Handbooks.

- The DEO plays an integral role in maintaining long standing affiliate relationships but also evaluating the value for new partnerships to ensure a workforce able to address the needs for veterans for years to come. These relationships may include partnering with Department of Defense (DoD) training programs.
- The DEO should play a key role in partnering with affiliates such as working on joint recruiting, assuring VA clinicians have faculty appointments, and actively building relationships through Affiliation Partnership Councils.
- In 2014 through the Veterans Access, Choice, and Accountability Act, (VACAA), legislation was passed to enhance Graduate Medical Education (GME) for physician trainees. This legislation focused on enhancing VA training in the areas of Primary Care, Mental Health, and “Critical Needs” by increasing GME positions by 1500 by 2025. In addition, underserved and rural areas are areas of focus for the expansion. The DEO plays a significant role enhancing the VACAA initiative at their local level.
- DEOs should be monitoring faculty evaluations, the learning environment and assessing educational resources on an annual basis.
- DEOs also act as educational consultants on matters pertaining to affiliations and accredited training programs, especially regarding the initiation of new affiliations, programs, and sites of training.
- DEOs are important participants in VA system redesign efforts, as health professions trainees are vital participants in a wide variety of clinical activities. The interaction of trainee activities and clinical activities must be considered when changes to either are being considered, as mutual benefit should be sought and unanticipated adverse consequences to either should be avoided.
- While overall objectives are similar and a close working relationship (if not consolidated in one position) is expected, **the DEO and DLO roles may be differentiated as follows (see summary table below):**
  - The DLO is primarily concerned with VA staff education and workforce development.
  - The DEO is primarily concerned with affiliated, accredited training programs, affiliations and affiliation agreements, and interface with academic counterparts at affiliates.
  - Both are expected to have good working relationships with Human Resources Management and Fiscal Services as well as all service chiefs. In addition, the DEO should be in communication with the ACOS/Research.
  - The DEO must report to the Chief of Staff (COS), but the lines of reporting for the DLO have been variable.

- The principal VACO interface for DEOs is the Office of Academic Affiliations (OAA); whereas, the principal VACO interfaces for DLOs are the Employee Education System (EES) and National Center for Organization Development (NCOD).
- Both the DEO and DLO are expected to be Learning Leaders and should be consulted by staff and VA facility leadership on matters pertaining to their respective areas of expertise.

## Role Comparison

Category/Attribute	DEO	DLO
<b>Primary focus</b>	Affiliated training programs, affiliations, VA training programs & academic relationships, DoD	VA staff education, workforce development, and succession planning, DoD
<b>Local interface</b>	HR, Fiscal, all service chiefs, ACOS/R&D, COS	HR, Fiscal, all service chiefs, COS, AD
<b>VISN interface</b>	Network Academic Affiliations Officer (NAAO)	Network DLO
<b>VACO interface</b>	Office of Academic Affiliations (OAA)	Employee Education Sys (EES), & Nat'l Center for Organization Development (NCOD)
<b>Consultation</b>	As an educational leader, pertaining to academic programs	As an educational leader, pertaining to staff development
<b>Expertise (Differentiating)</b>	Clinical education & training, accreditation standards, affiliations and related agreements, training innovations	Adult education and learning technologies, continuing clinical education & standards
<b>Qualifications</b>	Doctorally-prepared clinician or educator; experience in clinical education management & affiliations; has a faculty appointment	Masters or doctorally-prepared clinician or educator, with experience in education management
<b>Lines of reporting</b>	Chief of Staff (per policy)	Variable (e.g., ACOS/E, COS, AD, Director, HR)

## ***Learning Leader: 4 “Areas of Expertise”***

The functional role of the Learning or Education Leader was identified through a recent series of focus groups. 4 Areas of Expertise were identified for learning leaders to ensure the transformation to a learning organization. It is suggested that all supportive learning roles (DLO, DEO, Ed. Coordinator, etc.) be aligned with these areas of expertise.

### **Learning/Education Leader 4 Areas of Expertise**

### **Description**

#### **Enabling Learning**

- Creates and sustains an organizational work environment that supports learning, discovery, and continuous improvement.

#### **Aligning Resources**

- Aligns and manages fiscal, human and capital resources to meet organizational learning needs.

#### **Driving Results**

- Drives learning and performance results to impact organizational success.

#### **Leading Change**

- Leads organizational change and transformation through positioning and implementing innovative learning and education strategies.

## ***DEO Role – Expertise in “Enabling Learning”***

### **Enabling Learning**

•Creates and sustains an organizational work environment that supports learning, discovery, and continuous improvement.

#### **DEO responsibilities that align with this Education/Learning Leader Area of Expertise**

- The DEO provides leadership and collaboration in developing and deploying educational and training programs, resources, and services to execute the organization’s strategy through planning, organizing, monitoring, and adjusting activities associated with accredited trainees’ VA experiences.
- The DEO uses historical, current, and emerging organization priorities to forecast, plan, and guide day-to-day education activities to achieve desired results and establish planning continuity between the organization and affiliates.
- The DEO interacts with local VA management and service-level managers to ensure the VA education environment supports the curricular needs of trainees as well as the care needs of Veterans.
- The DEO establishes working relationships with affiliates and manages affiliate relationships in order to:
  - Advance the VA strategy and the educational needs of affiliates.
  - Resolve issues in a constructive and collaborative manner within the VA and with affiliates.

#### **DEO Task and Behavioral Descriptions of Responsibility**

- Serves as the VA point of contact (POC) for all issues involving trainees in accredited programs.
- Initiates and conducts the planning process to determine the number and distribution of resident positions.
- Ensures appropriate establishment and execution of affiliation agreements, disbursement agreements, MOUs, and program letters of agreement (PLAs). In addition, the DEO ensures appropriate processes are in place to keep these documents stored and updated as per requirements.
- Provides oversight (consistent with VA policy and accreditation requirements) of all trainees including graduate medical, dental education, nursing and other associated health trainees at the VA facility or consolidated facilities using appropriate Directives and Handbooks.
- Completes required facility, VISN, and VHA OAA reports.
- Demonstrates background and knowledge of educational programs and adult “learning” to work with program directors and clinical staff to ensure that appropriate clinical training environments, and adequate clinical workload are available to meet educational objectives.
- Manages educational affiliations and all appropriate agreements for the affiliation.
- Ensures that all residents and trainees have appropriate VA appointments through the Human Resources Service, have facility and badge access, and remain up to date on any mandatory training.
- Ensures that formal affiliation agreements, Trainee Qualification and Verification Letters (TQCVLs), disbursement agreements, and Program letters of agreements (PLAs), and Memorandums of Understandings (MOUs) are in place for all sponsoring institutions as needed.

- Is familiar with the VA policies impacting trainee education and accreditation requirements of various programs.
- Oversees trainee education monitors – e.g., resident supervision, resident time keeping, etc.
- Has an understanding of legal issues affecting trainees (e.g., tort claims).
- Interfaces with affiliate DIO, Associate Deans (for Undergraduate, Graduate, and Continuing Medical Education), Deans of Nursing and Pharmacy and clinical department chairs.
- Participates on key educational committees at the affiliate (e.g., the Graduate Medical Education Committee).
- Participates in national calls and conferences sponsored by OAA.
- Works closely with hospital leadership and affiliates to educate and appoint site directors for the educational programs and assist with advocating for joint faculty appointments and recruitment.

## ***DEO Role – Expertise in “Aligning Resources”***



### **DEO Responsibilities that align with this Education/Learning Leader Area of Expertise**

- 1. Education Fiscal Stewardship:** Manages Affiliation Funding and Payment fiscal resources to support deployment of trainee education services.

#### **DEO Task and Behavioral Descriptions of Responsibility**

- Manages distributed funds to facilities to pay stipends to trainees.
- Oversees and manages appropriated disbursement agreement funds at each facility in accordance with the VHA HANDBOOK 1400.05.
- Ensures obligations are met by academic affiliates (i.e. tracking of the “agreements” and following policies).
- Oversees the appointment and direct payment of trainees. Applies pertinent OAA and HR policy/guidance as it relates to affiliation funding.
- Advocates for trainee experiences and rotations that support the care needs of Veterans.
- Negotiates with educational institutions for a trainee mix that will support specific programs and Veteran services.

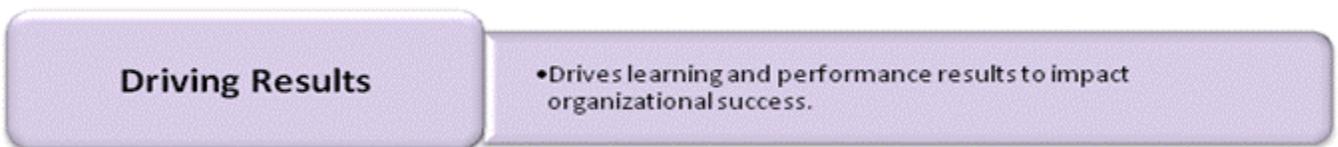
- 2. Education Resources Infrastructure Management:** Ensures the necessary mix of resources [i.e. program, human, capital and technology] are available to support the oversight of disbursement agreements.

#### **DEO Task and Behavioral Descriptions of Responsibility**

- Provides leadership in designing and implementing trainee education solutions to meet the needs of the organization and the trainee.
- Oversees educational activity record keeping for affiliate training at the VA.

- Monitors trainee and resident participation in assigned educational activities and clinical assignments (e.g. Ensuring trainees have completed the Mandatory Training for Trainees Course or Refresher annually).
- Assigns staff to support key trainee requirements such as trainee appointments, background screening, orientation, etc.
- Collaborates with other services to coordinate key trainee functions such as assigning parking, assigning computer codes, giving remote access into the medical record (VPN accounts), ID creation, etc.

## ***DEO Role – Expertise in “Driving Results”***



### **DEO Responsibilities that align with this Learning Leader Area of Expertise**

- 1. Oversight of Trainee Programs:** Provides education expertise, advice, guidance and problem-solving to identify and understand trainee needs, problems and opportunities. Specifically, uses data and information collected from monitors, audits, QM, risk management activities, and surveys to drive facility-wide improvements through use of educational methods.
- 2. Enhancement of Performance Improvement:** Uses knowledge of training programs and participation in appropriate facility and VISN committees to identify areas in need of improvement at the facility and VISN level and to suggest appropriate methods of addressing them.

### **DEO Task and Behavioral Descriptions of Responsibility**

- Ensures, through leadership influence and oversight, that all aspects of trainee onboarding are performed timely and to policy standards.
- Provides oversight to ensure trainees have proper clinical supervision in place and are monitored accordingly to required guidelines.
- Encourages participation in VA’s Learners’ Perceptions Survey to ensure a locally high response rate.
- Use Learners’ Perceptions Survey (LPS) data to monitor the effectiveness of trainee education programs and as a quality improvement tool.
- Monitors documentation of resident supervision in health record to ensure that supervision is occurring according to policy and in a manner conducive to high quality, safe patient care.
- Monitor quality of supervision to ensure supervising clinicians are providing guidance, coaching and mentoring.
- Review risk events (‘near misses’, adverse events, patient complaints and tort claims) for resident involvement and appropriate supervision.
- Collaborate with or give feedback to service chiefs and/or chief of staff when deficiencies are occurring or gaps are present in supervision.
- Participate in evaluation of innovative or pilot educational projects that involve trainees.

## ***DEO Role – Expertise in “Leading Change”***

### **Leading Change**

•Leads organizational change and transformation through positioning and implementing innovative learning strategies.

#### **DEO Responsibilities that align with this Learning Leader Area of Expertise**

##### **Education/Learning Leadership:**

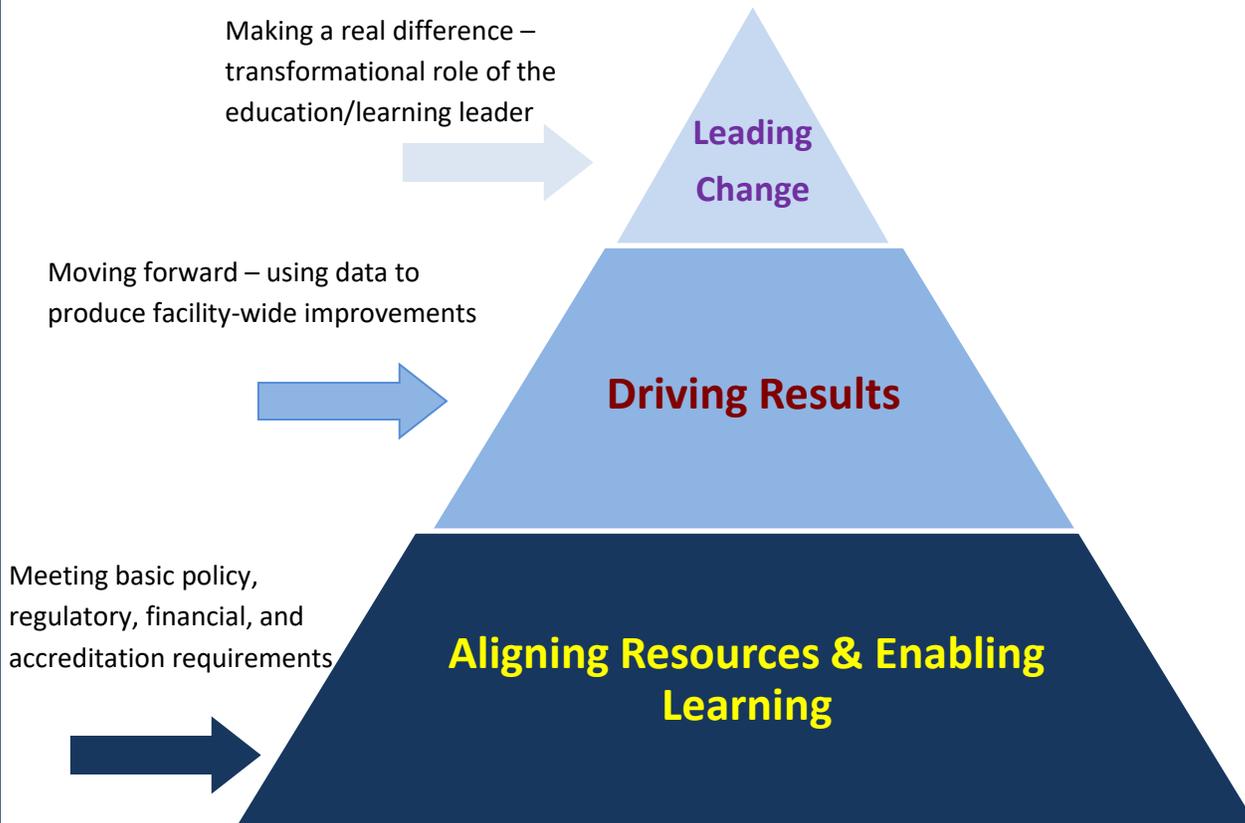
- Communicates and translates a learning organization vision into action and promotes practices that support a positive and effective trainee education experience in conjunction with the provision of outstanding health care.
- Remains abreast of developments in the field of graduate medical and dental education in order to recognize and promote innovative practices.

##### **DEO Task and Behavioral Descriptions of Responsibility: The DEO**

- Proposes continuous process changes and innovation in of trainee educational programs.
- Implements educational programs that are respectful of generational differences of trainees (and differences in preferences such as “work/life balance,” etc.).
- Serves as a primary consultant on trainee educational matters to VA staff and managers
- Participates in strategic planning at VA facility and Network level.
- Facilitates communication and provides guidance and support to facility and affiliate leaders to develop or expand programs in response to VA Requests for Proposals (RFP’s) and other initiatives.
- Actively participates in starting new training programs or initiatives, especially those involving quality and patient safety such as the Chief Residents in Quality and Patient Safety.
- Advocates for changes in education focus as new trainees demand new technologies and new learning methodologies.
- Advocates for change in education curriculum and structure based upon educational research and to better trainees for the practice environments of the future.
- Promotes inter-professional educational models.
- Is familiar with the education literature and educational research.
- Annually, engages in continuing education aimed at enhancing one’s professional development (e.g., the American Association of Medical Colleges Group on Resident Affairs (AAMC-GRA) spring meeting and their course for GME Leadership).
- Manages the complex and high-level relationships between VA and academic affiliates.
- Integrates successfully into high level leadership forums and meetings by establishing credibility and expertise in the education arena.
- Advocates successfully for both VA and affiliate interests (depending on audience) and translates effectively between cultures.
- Conducts research on education and presents findings at regional or national meetings citing the VA.

- Publishes on educational research and topics in peer-reviewed journals and other publications citing the VA (e.g., society newsletters).

## ***DEO roles & expertise – analogy to Maslow’s Hierarchy of Needs***



## ***DEO Qualifications***

A DEO should ideally be a senior, doctorally-prepared clinician (medicine, nursing, or other associated health leader) and a respected educator experienced in the administration of educational programs and knowledgeable about affiliations and affiliation relationships. For programs with large Graduate Medical Education Programs, experience with GME is highly recommended to ensure compliance with accreditation standards and VA policy. A doctorally-prepared educator with experience in CLINICAL education and academic medical education settings would also be acceptable. Familiarity with graduate medical education and other health professions education is essential. The appointment process should be a shared responsibility of the facility Chief of Staff, the VISN CMO or Network Director, and the Office of Academic Affiliations (OAA). The VACO Chief Academic Affiliations Officer could be consulted early in the recruitment process regarding the selection of the candidate. If an individual nominated for the position by the facility or VISN is not thought to meet basic qualifications or is predicted to not be successful in the DEO role, the Office of Academic Affiliations will discuss alternatives to the nominated candidate or suggest remediation strategies with the facility or VISN leadership. OAA will help ensure the placement of all new DEOs in an appropriate professional development program and will assist with the identification of appropriate mentors and preceptors. A DEO should have (or qualify for) an appropriate faculty appointment in the

department most relevant to his/her expertise. Ideally, a DEO would also have management experience as a service or section chief or as a program director.

## ***Education/Training Expectations***

Within one year of appointment, the DEO should participate in the OAA-sponsored training for DEOs. All DEOs should participate in national conferences sponsored by OAA. In addition, it is strongly encouraged that a new DEO attend the three-part AAMC Group on Resident Affairs (GRA, Association of American Medical Colleges) course on GME Leadership and the annual AAMC GRA spring meeting.

## ***Time/Effort Commitment to the DEO Role***

For DEOs in facilities with 100 or more residents, the DEO should devote between 50 to 100% of his/her time/effort to the DEO role (not taking into account collateral any possible DLO collateral duties). If less than 100 residents, between 20 to 50% time/effort would be appropriate, depending upon the number of residents, number of associated health trainees, and the complexity of the affiliation relationships. Having appropriate educational resources (including support staff and space) for education and DEO are necessary to ensure the success of the training programs. Hospitals are encouraged to use educational funds (indirect VERA funding for trainees) to offset these expenses. If there are a large number of additional trainees (e.g. Associated Health, Students), additional staffing may be required. Office staffing should be commensurate with the size and complexity of the training programs and affiliation relationships. Administrative staff supporting the education office are also invited and encouraged to attend OAA-sponsored trainings.

Below is the staffing model recommendation from the Office of Academic Affiliations. This model bases the recommendation of staff time and number of FTEE for an Education Office dependent on the number of allocated positions and/or number of trainees. This model includes all Health Professional Trainees, paid and unpaid.

Row #	# 1 Physician/Dental Funded Resident Positions (FTEE)	#2 AHE/ Nursing/non- Physician AF Funded Trainee Positions (FTEE)	# 3 Total Trainees (paid and unpaid - individuals)	DEO % Effort	# GS 7-9 FTEE	# GS 11-13 FTEE	Total Recommended FTEE
<b>One of these 3 criteria MUST be met</b>							
1	>250	>100	>1,000	75 – 100%	5.5	1.5	8
2	200 – 249	>100	>750	75 – 100%	4.5	1.5	7
3	150 – 199	>50	>500	50 – 100%	3.5	1	5
4	100 - 149	>35	>250	50 – 100%	2.5	1	4
5	50 – 99	>20	>100	50%	2.5	0.5	4
6	20 – 49	>10	>50	50%	1	0.25	2
7	1 - 20	>1	>25	50%	1	0.25	2

