

ICASS Update for the Federal Shared Services Forum

ICASS Good Governance Playbook

*Automated Draft Quality Management System
Annual Reports Created for Posts*

ICASS Customer Survey Results Analysis

Peter A Hogan

Deputy Director

ICASS Service Center

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ICASS Governance Issues At Post and a Post-Generated Solution

- ▶ *2020 Assessment of ICASS noted issues with customer engagement at many posts*
- ▶ *Issues included lack of pre-deployment training; lack of knowledge about the program; lack of understanding of their role in the system*
- ▶ *As some posts had developed practices to address these issues, we sought a field-based solution*
- ▶ *With post input, the ICASS Service Center launched the “Good Governance Playbook” with 11 posts sharing successful strategies*

The Basic Elements of the Playbook include:

- ▶ *Set the Tone*
- ▶ *Train and Orient New Members*
- ▶ *Tailor ICASS Leadership Succession and Recruitment*
- ▶ *Manage the Meetings*
- ▶ *Communicate Early and Include the “WIFM”*
- ▶ *Use Data to Build Trust*
- ▶ *Manage Customer Expectations*
- ▶ *Anticipate Challenges*

The Playbook Includes a Mix of Strategies That Posts Can Adapt to Their Needs

- ▶ *The eight areas include 47 different strategies or procedures that have proven successful across large and small posts*
- ▶ *Key to success at some posts is to accept and manage for the fact that some customers will arrive with little or no knowledge of ICASS*
- ▶ *Another critical success factor relates to succession...leaving that to chance leads to gaps or to a “misfit” between reality and desired outcomes*
- ▶ *Adopting a “no surprises” approach, either to the schedule of meetings or issues to be discussed...whether “good” or “bad” news... pays dividends in building trust and encouraging participation*

The Post Annual Performance Assessment - Making Compliance


Easier



- ▶ *For 15 years, posts have been required to produce a report on performance and satisfaction outcomes....and how they were addressing service delivery failure*
- ▶ *The APA is the annual reporting requirement for the Department's overseas Quality Management System (QMS), but many posts struggled to complete the report*
- ▶ *Its production has four components:*
 - ▶ *Find the data showing outliers and trends of concern*
 - ▶ *Compile the data into a coherent report*
 - ▶ *Analyze the data to determine problems and potential solutions*
 - ▶ *Create an Action Plan for the coming year*


Management Data Is Accessible in a “One-stop shop”

- ▶ The Department created a Sharepoint site called the Management Analytics Portal (MAP) where posts can access their performance and satisfaction data

SENSITIVE BUT UNCLASSIFIED



Management Analytics Portal
 Department of State | M|SS




Post Performance Overview

Summarizes post performance through analysis of USS compliance, MyServices survey ratings, and total number of services




Global & Regional Comparison View

Enables regional and global comparison of average USS compliance, business hours, MyServices survey ratings, LE/EFM Staff Efficiency, and ICASS survey results



LE/EFM Staff Efficiency

Provides insight into workload, LE/EFM staffing levels, and LE/EFM efficiency. In addition, summarizes growth of staff at posts over time.



ICASS Survey Results

Summarizes ICASS survey results by post

Service Type (USS) Detail Views The Service Type (USS) Detail Views provide key insights and data points about each measured Service Type (USS). Click one of the buttons below to navigate to the view for the desired service type.

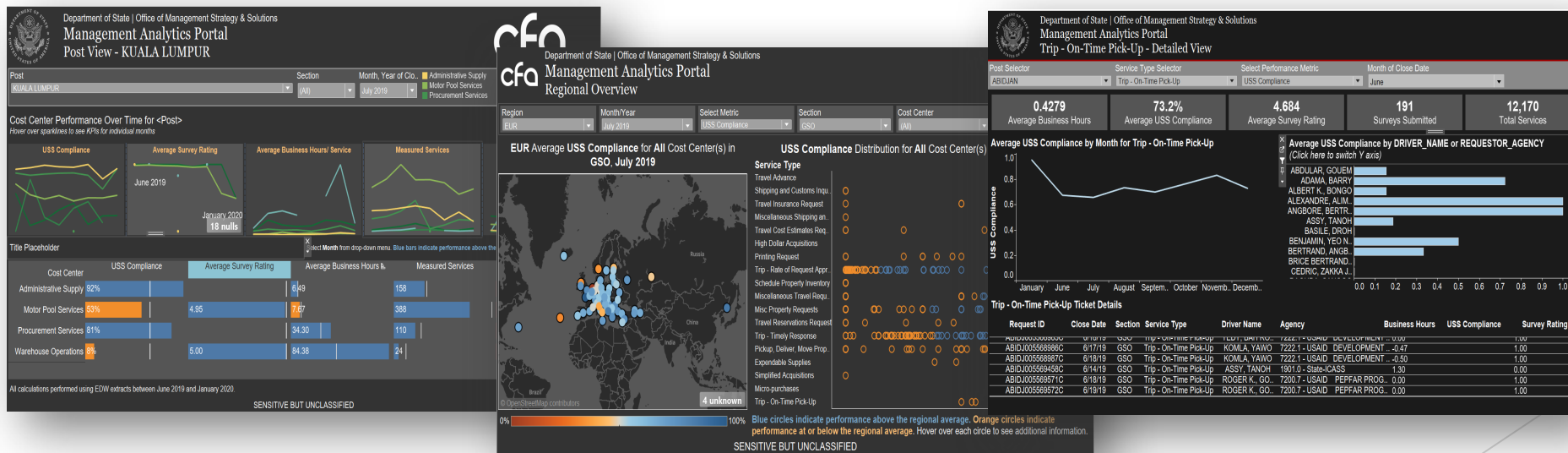
Motorpool - On Time Pickup	Travel Services Reservation Request	OL Non-Residential Building Operations	Obligations Processed	IT Account Setup/Transfer
Motorpool - Rate of Request Approval	Miscellaneous Travel Request	OL Residential Building Operations	Miscellaneous HR Request	Install Hardware
Visitor Access to Post	Travel Cost Estimate Request	GO/CL Residential Building Operations	Licenses, Permits, and Accreditation	IT Device Support
Administrative Supply Services	Shipping & Customs Inquiry	GO/CL Non-Residential Building Operations	Certificate of Employment	IT Fix Problem Tier 1
Background Check	Property Pickup/Delivery/Move	Procurement (All Categories/Values)	IT - Mailroom Request	IT Fix Problem Tier 2
				IT Fix Problem Tier 3

Last Data Update: 3/8/2022 10:37:48 AM Monthly data will be updated around the 5th of each following month

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Management Data Is Accessible in a “One-stop shop”

- ▶ The MAP contains a lot of data on performance against “uniform service standards” and customer feedback from “point of sale” one-off surveys and the annual ICASS Customer Survey



The Post Annual Performance Assessment - Making Compliance

Easier

- ▶ *Many posts struggled with the first two components of the task: finding significant data and compiling the report*
- ▶ *While comprehensive, the MAP requires post personnel to spend time with the data to understand it and see where it reveals challenges*
- ▶ *The problem of limited “human bandwidth” meant that some posts were unable to devote time to understanding their data*
- ▶ *If you don’t understand your data, it’s hard to identify where significant outliers and trends exist that are needed to create an action plan to address problems*

The Post Annual Performance Assessment - Making Compliance Easier

- ▶ *With Regional Bureau leadership endorsement and the ICASS Executive Board approval of funding for the project, an “automated” APA has been created for every mission in the world*
- ▶ *Each mission’s report identifies significant data outliers and trends, eliminating two of the four steps in the process of creating the reports*
- ▶ *Posts begin with a “template” with graphics and text identifying significant information, enabling the post to focus on the analysis and the action plan*
- ▶ *The report includes charts created to provide insights that go beyond what a post may find within the MAP*

The Post Annual Performance Assessment - Making Compliance Easier

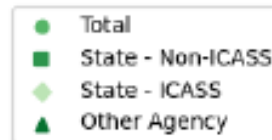
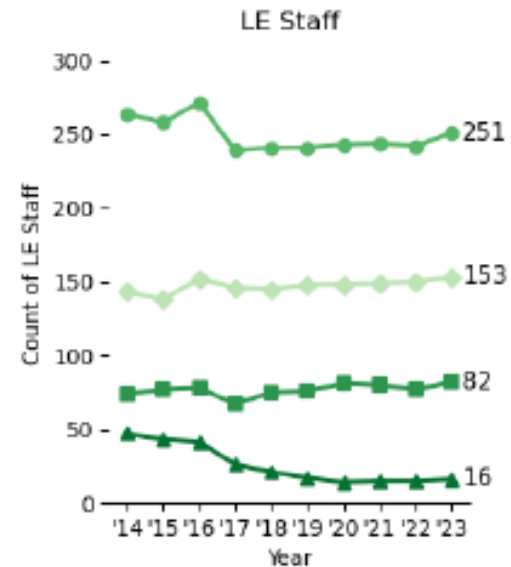
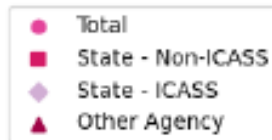
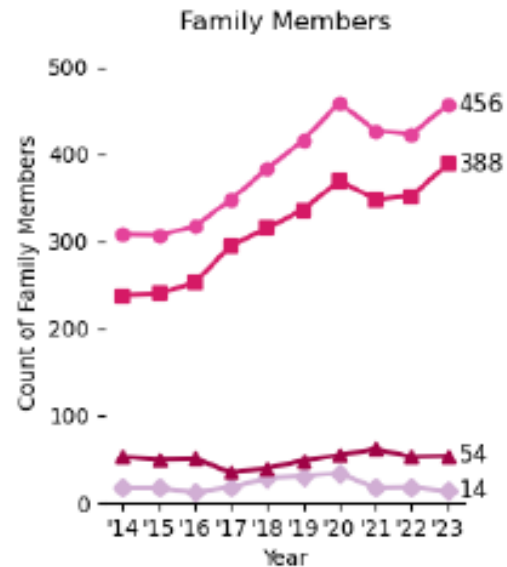
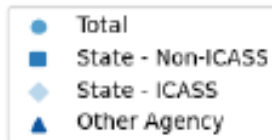
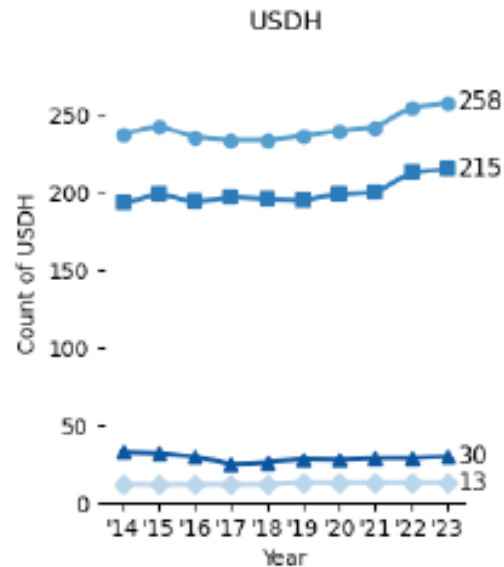
- ▶ Each mission can find its template on the MAP data dashboard (second from right), making it accessible enough that many will find it even when they aren't looking:

The screenshot displays the Management Analytics Portal (MAP) Landing Page. The header includes the logos for M|Strategy & Solutions and cfa, the text "Management Analytics Portal", and a "SENSITIVE BUT UNCLASSIFIED" label. The main content area is titled "Management Analytics Portal (MAP) Landing Page" and features five dashboard tiles, each with a "PROJECT LINKS" section and a "Go to Dashboard" link.

Dashboard Tile	Description	PROJECT LINKS
Post Performance Overview	Summarizes post performance through analysis of USS compliance, MyServices survey ratings, and total number of services.	Go to Dashboard
Global & Regional Comparison View	Enables regional and global comparison of average USS compliance, business hours, MyServices survey ratings, LE/EFM staff efficiency, and ICASS survey results.	Go to Dashboard
LE/EFM Staff Efficiency	Provides insight into workload, LE/EFM staffing levels, and LE/EFM efficiency. In addition, summarizes growth of staff at posts over time.	Go to Dashboard
Annual Performance Assessment	Automated Annual Performance Assessment Report	Go to Dashboard
ICASS Survey Results	Summarizes ICASS survey results by post.	Go to Dashboard

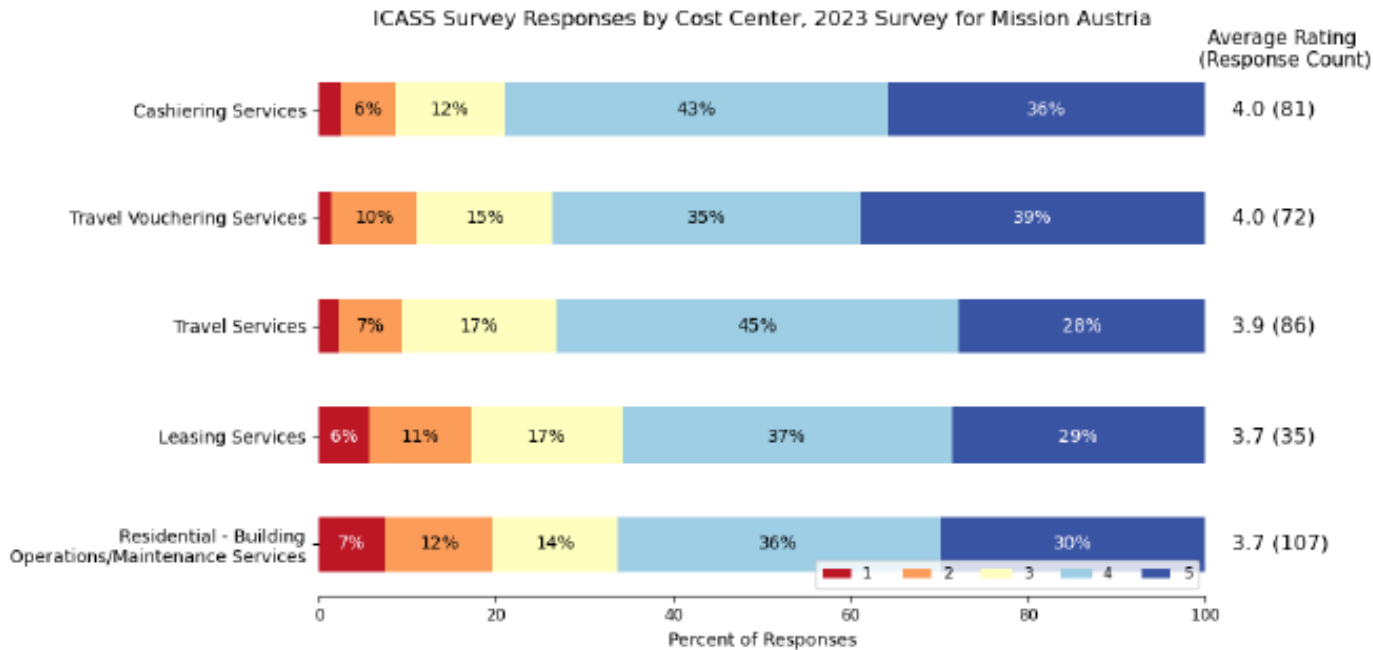
APA Visualizations Emphasize Trend Lines and Outliers:

Total Mission Austria Subscribers by State vs. Other Agency Positions and Type, FY 2014 to FY 2023



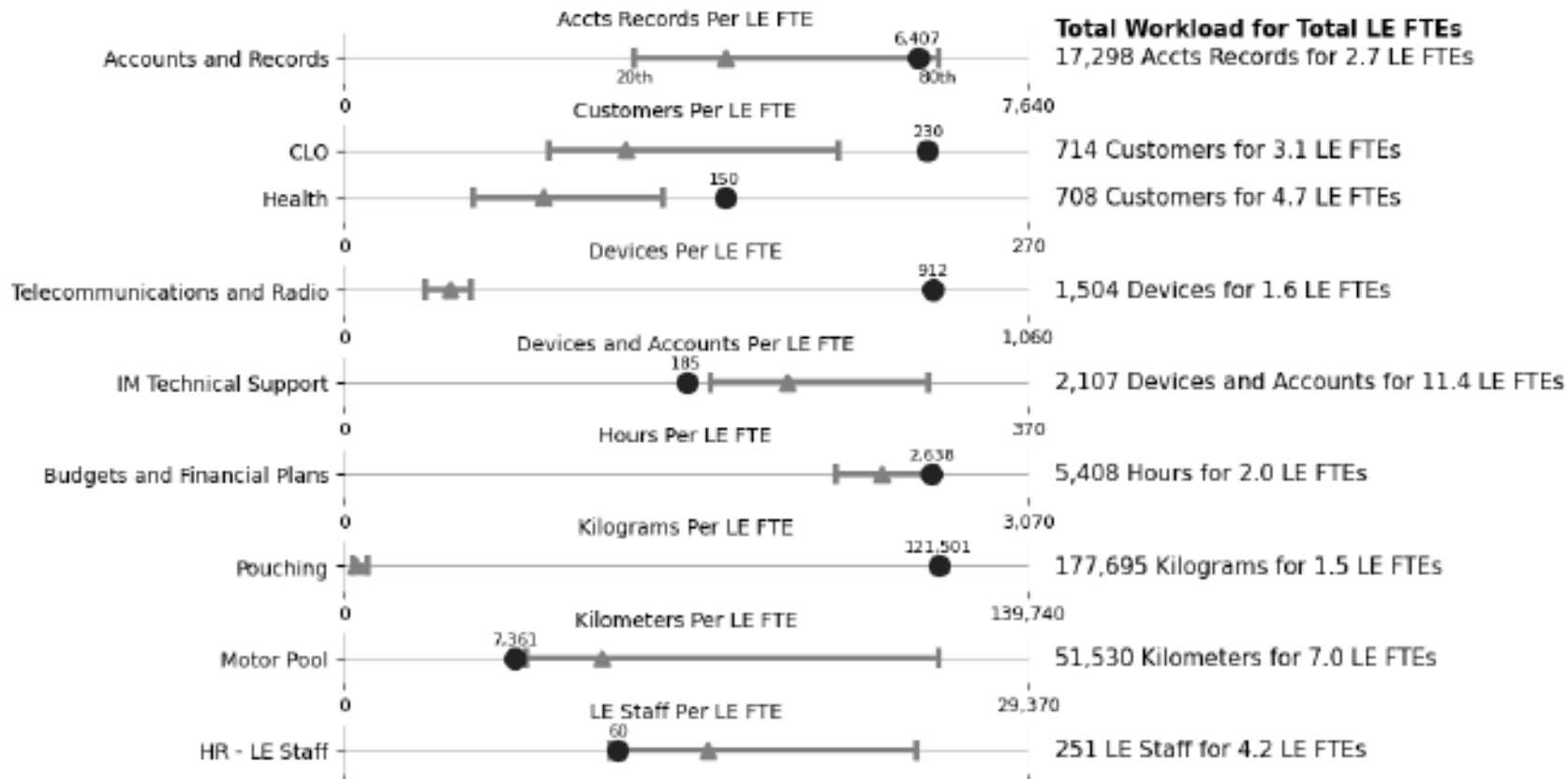
APA Visualizations Emphasize Trend Lines and Outliers:

The figure below shows the distribution of responses for the five cost centers with the lowest average customer satisfaction from 1 (Strongly Disagree) to 5 (Strongly Agree) on customer satisfaction. For visual clarity, percentages below 5 percent are not annotated on the figure below. Residential - Building Operations/Maintenance Services had the highest proportion of Strongly Disagree (7%, 8 responses) and Disagree (12%, 13 responses) responses.



APA Visualizations Emphasize Trend Lines and Outliers:

Workload Per LE FTE by Cost Center, Mission Austria 2023



ICASS Customer Survey Results Analyzed for Fraud and Greater Understanding of the Voice of the Customer

- ▶ *The ICASS survey vendor uses an algorithm based on pattern recognition to detect fraud, AKA “ballot stuffing”*
- ▶ *Most fraudsters are not non-State Americans trying to depress scores, but locally employed Management staff trying to push scores up*
- ▶ *Respondents giving a score of 1 or 2 on a five-point scale receive an immediate prompt to leave comments regarding their dissatisfaction*
- ▶ *Special post-specific reports are prepared for services at a given post where there are 20 or more comments from respondents rating services low*