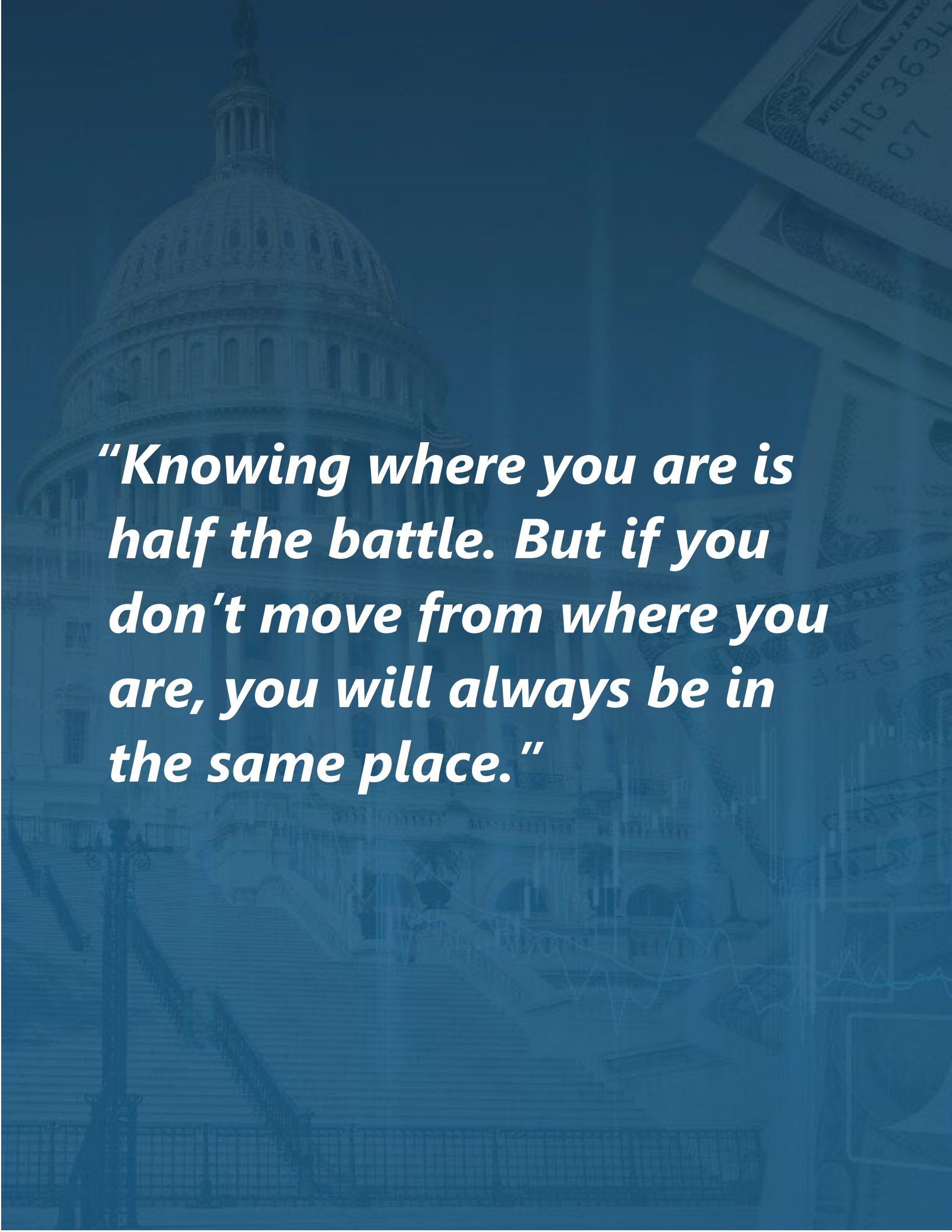


# Measuring the Business Value of Shared Services

July 2023



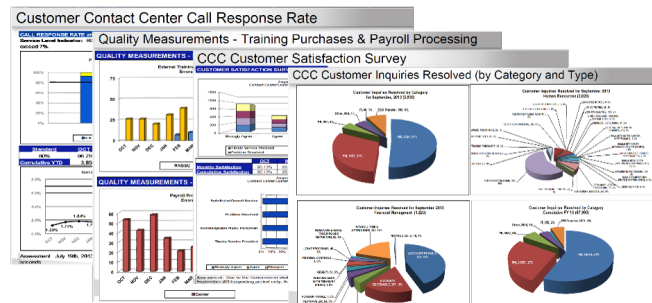


***"Knowing where you are is half the battle. But if you don't move from where you are, you will always be in the same place."***

## Introduction

The purpose of a Shared Service Center (SSC), as designed, is to be more efficient and effective **than traditional standalone services**. Efficiency and effectiveness come from interrelated consolidation and centralization, reduced technology and facility footprints, policy and process improvements, streamlined management, staff reductions, and use of advanced technologies. The approach to providing organization-wide common services has taken root with over 60% of large private sector organizations maturing in shared services as well as country governments such as Canada, the United Kingdom, Singapore, and Australia. They are organized as centralized SSCs that **serve multiple agency customers across multiple functional areas**.

The purpose of this document is to profile what some SSCs currently measure to determine their efficiency and effectiveness so that the reader can begin to consider U.S. federal government's needs. It is based on gathering input from SSCs in the U.S. federal government, other country governments, state governments, and large private sector organizations. Input was gathered by identifying SSCs, conducting interviews, and reviewing provided data and documentation. We also reviewed the Shared Services Outsourcing Network (SSON) metric profiles and conducted a literature review. Areas that are measured for SSCs typically include quantitative and qualitative indicators in:



1. Customer Experience and Outcomes
2. Operational Performance
3. Cost and/or Cost Avoidance

We also suggest additional areas to measure including:

4. Modernization Efforts
5. Internal SSC Success Factors

Foundationally, SSCs must possess the following attributes to be successful:

- Supportive leaders who make timely decisions and provide the necessary guidance and resources.
- Effective program management skills.
- Effective policy and legislation to promulgate efficiency and effectiveness and provide paths to funding.
- Highly skilled staff in the line of business functional areas, continuous improvement, impact orientation, customer experience, problem solving, data science, and marketing/business development.

- A clear and well understood connection between the successful performance of the SSC and the success of the customer at both an operational performance and mission achievement level.
- The data and capacity to measure performance, outcomes, and make decisions for program optimization and customer service.
- Willingness to challenge existing processes, policy, and operating models.
- An appropriate budget (investment and operations).
- Accountability for performance, ROI, and results.
- Ability to effectively manage change.
- Bandwidth to be successful, handle surges, and support growth.
- Clear and enforced standards.
- Technology enabled processes to continually innovate and remain current.
- Capacity to engage advanced technologies such as BOTS, AI, generative AI, ML, etc.
- Support for new approaches such as self-service and touchless processes.

Overall, as noted herein measuring the efficiency and effectiveness of SSCs is currently less mature than is needed to demonstrate full value. Some SSCs provide basic and anecdotal measures, others are much more sophisticated and multi-dimensional, while some measure nothing at all. Some of the entities use simple reporting or spreadsheets, others robust data sets, systems, and visualization tools. As federal SSCs mature, this document should be updated as it is just a first look at SSC measurement optimization at an early stage within the U.S. federal government and other entities.

This document profiles measures in each of the five areas identified on page 1 and the typical measures employed as reported by multiple sources. Consider it a work in progress. While measuring the efficiency and effectiveness of SSCs needs to mature, the reader can use these as examples to build one's own performance measurement system and tools. Also, each SSC or related service line may be unique and require its own critical metrics. Only a few common or typical lines of business are included here, yet they provide input to and ideas for other service lines.

## Why Measure

Measuring is important to determine the **efficiency** (how well an SSC performs and their outputs) and **effectiveness** (the outcomes, impact, or benefits it derives for customers and the government as a whole) from shared services. Without measures SSCs cannot prove their value over traditional standalone service functions. SSC measures are used to:

- Demonstrate value for SSC performance and operations to the customer, government, and the American people.
- Differentiate the benefits of SSCs from standalone service providers.
- Lead and manage performance, quality, and outcomes, and demonstrating their trends over time (achievements or challenges).

***Measures must prove the value of SSCs over traditional standalone providers.***



- Help engage customers, set expectations, and define Service Level Agreements (SLAs).
- Support informing leadership and allowing for effective decision making for both the SSC and customer level.
- Help focus efforts on priorities, policy, process, and continuous improvement.
- Support learning and establish a basis for growth, added functionality, and help make future business cases.
- Improve internal and external communications, decision-making, and reporting.
- Select the resources and system tools that best serve the SSC and customers.

A **measure** is an indicator of actual performance against a standard and targets used to demonstrate efficiency and effectiveness. A **metric** is a piece of data at a given point in time that demonstrates progress, performance, or achievement. They can be quantitative and qualitative. Measures will identify:

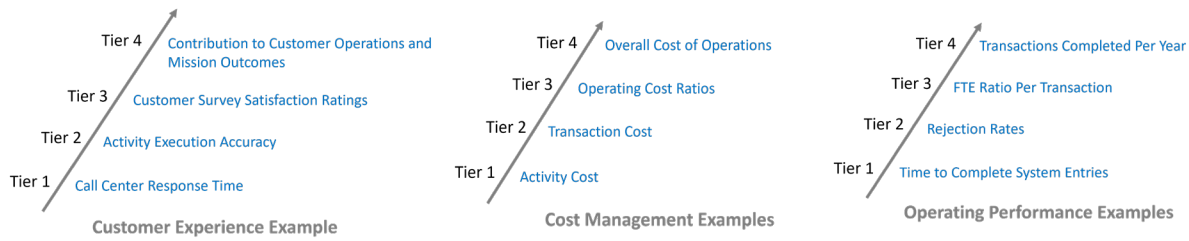
- What is being accomplished.
- The timeliness and quality of the performance.
- The cost of the performance.
- Contributions to customer performance.

Measures must be driven by **standards**. Standards are points of reference or mandates that must be adhered to. Standards come from policy, operating procedures, customer needs and agreements, system designs, legislation, leadership visions, and other mandates.

Measures must be **meaningful**. This means they are important and useful in determining the efficiency and effectiveness of the SSC. They must **differentiate** the SSC from a standalone service function. Many organizations have lots of data and sometimes hundreds of measures. However, measures must be **properly structured and ensure data is available and valid**. Too many measures can overwhelm the user but can also be useful in determining the root cause of performance drift, increasing costs, change, quality, or an expanding issue (success or challenge). Noticeable changes within a few measures could cause an SSC to go digging further into more detailed data.

Measures should **tell a story**. Within a line of business, the use of historical (trends) and multiple data points can demonstrate status, success, or problems. This data can also highlight the differences in complexity in fulfilling customer operational or mission requirements and the degree of compliance with or impact when deviating from standards.

Measures can be granular or high level, and when combined or viewed as a tier structure, they contribute to the overall story. The lower the tier the more granular the data is and the more you can detect the reason for success or challenges. For example:



Measures can serve many purposes in building, managing, and improving the SSC. As previously stated, they must be used to demonstrate the benefits of shared services over traditional standalone functions, the differences in complexity in fulfilling various customer requirements, or the impact of a change in policy.

## Some Observations We Found in Engaging with SSC Measures

1. **Measuring organizational performance in SSCs is not mature.** A recent SSON survey showed that only about 47% of SSCs report measuring performance and most of those are granular operating metrics. There are more measures in operational performance and basic customer satisfaction than there are in outcomes or assessing the full customer experience.

Creating **baseline data and target measures against standards** can be a time-consuming effort and requires input and expertise from a variety of sources as well as decision-making regarding what is important and realistic. Most SSCs will begin rudimentary measurement and **mature over time** as data becomes available and is accumulated, business shifts take place, and management capacity and the data culture mature. It is okay to grow and adapt. Each SSC should have data experts on staff.

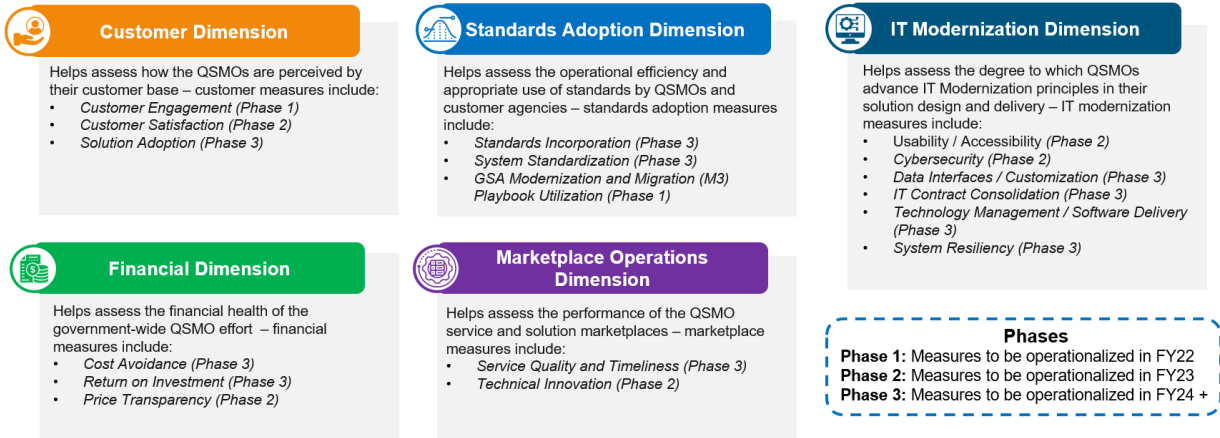
Financial management appears to be the most mature in measuring performance and outcomes in all SSC service areas. The National Aeronautics and Space Administration (NASA) SSC appears to be the most mature U.S. federal government agency regarding measuring performance, cost, and customer experience and outcomes. A stronger culture of data and measurement is required.

While measurement of SSC performance needs maturation for the U.S. federal government, the General Services Administration (GSA) Office of Shared Solutions and Performance Improvement (OSSPI) has created a multi-phased balanced scorecard approach that is in its early stages of development and implementation. Once operationalized, standards can be supported, continuous improvement can take place, it can be adapted to lines of business, and become an effective

### Observations

1. Measurement is generally not mature in SSCs.
2. Cost savings is the #1 desired measure in most other SSCs, yet it is rarely addressed or desired in the U.S. federal government.
3. Current U.S. federal government SSCs are less likely to provide full turnkey services.
4. There is no reliable or straightforward pathway for investment in SSCs in the U.S. federal government.

foundational tool for implementing shared services and demonstrating the results for the business cases made. The current OSSPI balanced scorecard is depicted below.



2. There is a clear difference in measuring cost savings between the U.S. federal government and other governments and private sector SSCs. Almost all other entities look for and measure cost savings as their #1 measure between standalone and SSCs (the 2nd most important measurement area cited is customer satisfaction and the value the SSC provides). The U.S. federal government shies away from cost savings and more often desires to measure cost avoidance (often-times a more subjective measure that lacks rigor or importance). This appears to be due to the complexity of the budget process, as well as culture, and the difficulty in determining savings. With stronger management practices and effective leadership this can be rectified and addressed by focusing on cost savings. In other words, government leadership needs to decide if shared services is a priority, what the business model should look like, being willing to invest funds and time, and expect a return on that investment.

For mature SSCs, cost savings has been realized from several areas with one entity reporting a 55% reduction in costs:

- Centralizing services into a single or several entities, essentially removing functionality from the agency, except for some liaison and policy staff, or need to keep some unique functionality local. Outsourcing is also an alternative to centralization and should be investigated further.
- Reengineering policy and process to make operations more efficient, making sure to ensure efficacy and accountability while doing so.
- Reducing technology platforms from many to one (or just several) resulting in reduced buy O&M, storage, and security costs. Assuming capable and human-centered technology, it also allows for consistency of performance and familiarity with the interface (creating efficiency). Some technologies can handle more than one Line of Business and can also support self-service, touchless processing, etc.

- Engaging advanced technologies to process routine actions, capture key information, and reduce audits. Having government-wide data for enterprise-wide analysis, reporting, and decision-making in one place.
- Reducing staffing levels accommodated by the above, allowing existing staff to perform higher level functions or be retrained in other occupational areas needed by government. Note, any transformation of this type should include funding for retraining.
- Reducing real property footprints due to centralization and consolidation.

3. **Unlike others, the U.S. federal government SSCs do not provide all services within each area.** SSCs in the U.S. federal government are typically multifunctional (providing more than one line of business). According to a recent SSON survey, 70% of SSCs are multifunctional. However, different from others, the U.S. federal government SSCs are **mostly not fully turnkey**. In other words, agencies fulfill their own functions and depend on SSCs for some additional functions or support. For example, while HR SSCs may provide classification, staffing, benefits and retirement administration, and other transactional services, they rarely provide the totality of the service nor the full gambit of HR services. They may or may not include things such as compensation planning, onboarding, performance management, complaint investigation, etc.

Unlike others, the U.S. federal government SSCs are mostly **used to supplement the line of business** within agencies. Whereas, in the private sector and other entities, SSCs are often fully centralized and are the single provider of all services within a functional responsibility. In other words, they provide full lifecycle turnkey services and are all or mostly functionally responsible for the line of business service to the customer agency. Resources do not exist in the customer agency, department, or program (except perhaps liaison staff). In the U.S. federal government, **agencies still maintain most, if not all, of the functional responsibilities**. For example, an agency may use a current SSC to conduct a needed procurement action under an Interagency Agreement (IAA) or Memorandum of Understanding (MOU) because the agency is unable to do it themselves due to volume or needed surge support. The SSC does not serve as an agency's full procurement function. This needs to be reviewed and decisions made regarding the most appropriate business and operating model and modernization of SSCs for the U.S. federal government to achieve true efficiency and effectiveness. Significant duplication of systems, lack of provider alignment with customer systems, misaligned systems, and significant customization, **creates many barriers** for shared services in the U.S. federal government. Frankly, **this makes the business case** for shared services to dramatically improve standardization, efficiency, effectiveness, and cost savings.

4. **There is no reliable or straightforward pathway for investment in SSCs in the U.S. federal government** and therefore the ability to measure true performance and benefits is hamstrung. Most SSCs outside of the U.S. federal government require and receive upfront funding to create, build, or mature their SSC. This is typically followed by an ROI to the organization for redeployment of resources to mission-directed activity, returned to the treasury, or to support future investments. The U.S. federal government has not been able to effectively address this at the highest leadership levels, identify



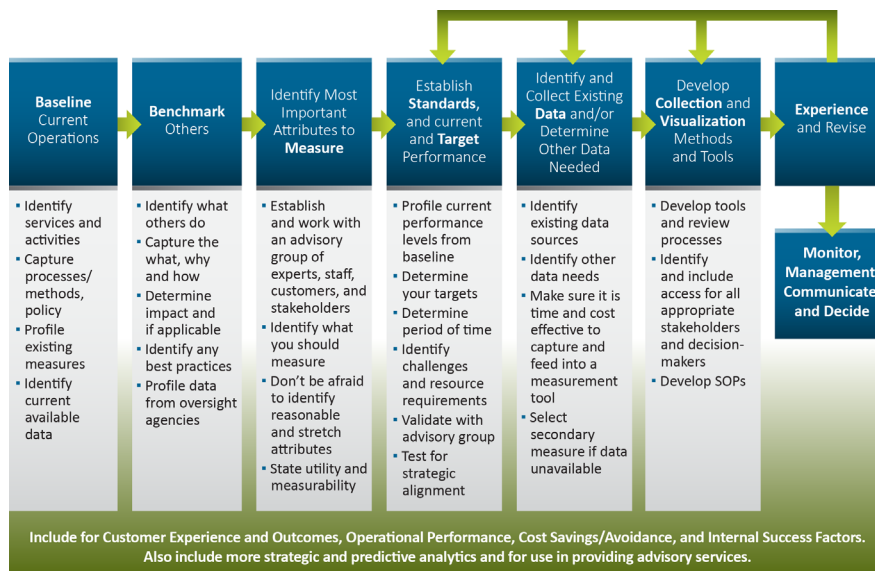
funding streams or budgetary tools, and approach enterprise-wide services for efficiency and effectiveness of government operations. Attention at the top of government is required to address this so that benefits can be gained.

Current financial tools available include Congressional appropriations, customer investment, application of retained earnings, use of unobligated funds, and use of the Technology Management Fund (TMF). Each of these may have strengths and challenges, but perhaps can be used together to make an effective investment with the required demonstrated results. A mandate or legislative change may be needed and return on investment demonstrated.

## Creating Measures for SSCs



Building measures requires a specific process to ensure completeness and validity. Below is a summary graphic of how to build a measurement system for SSCs. It assumes a vision, business case, and operating model for the SSC has been established. It could also be used if you are an existing SSC and want to improve the capacity to measure and improve performance or develop a business case for modernization.



## Examples of Measures and Achievements

Below are examples of measures actually used by other SSCs. They may or may not be what a given SSC will use but provide examples to stimulate thinking. Some are simple and others more involved. It is not an exhaustive list and they are not always well stated, but they do provide solid examples of what is important to most SSCs. They are grouped by the area previously identified to include:

1. Customer Experience and Outcome Measures
2. Operational Performance Measures
3. Cost Savings/Avoidance Measures
4. Modernization Measures
5. Internal Success Measures

In each area there is a brief definition/description, followed by a list of typical measures and examples of achievements by actual SSCs. Each element is measured against current performance, standalone service, and/or modernization activity.

Further, U.S. federal government examples of service measures identified in the General Services Administrations (GSA) Federal Integrated Business Framework (FIBF) are provided in Appendix A. For more information or the latest updates go to: <https://ussm.gsa.gov/fibf/>.

### 1. Customer Experience and Outcome Measures

**Customer Experience and Outcomes** – the qualitative and quantitative experience of (perceived or real) in process, outputs, and SSC capacity and achievements (outcomes) for the customer and key stakeholders for the services rendered. It also includes customer outcomes related to the ability of the SSC to contribute to operational and mission outcome achievement.

Measures are determined based on historical data, human centered design analysis (experiences, expectations, and standards), policy, managed expectations (SLAs), best-practices, and performance capacity. Customer-based measures include those associated with outputs, outcomes, and satisfaction. Measures can be expressed in volume, savings, achievements, or feelings (perceptions), etc. They also relate to Operational Performance (see below).

Reported Measures	Examples of Actual Measures and Achievement from Others <sup>1</sup>
<ul style="list-style-type: none"> <li>• Customer rated/experienced satisfaction                             <ul style="list-style-type: none"> <li>✓ Completion of service</li> <li>✓ Quality of service and outcomes</li> <li>✓ Timeliness of service</li> <li>✓ Communications</li> <li>✓ Relationship with service provider</li> <li>✓ Understanding unique needs</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Customer rating in a survey instrument of 4.5 or greater (F, OF, S, P)</li> <li>• Customer rating in a survey and/or desk audit of 98% or better (F)</li> <li>• Repeat customers or longevity due to transparency in costing and pricing (F)</li> </ul>

<sup>1</sup> (F) U.S. Federal Government; (OF) Other (Non-U.S.) Federal Governments; (S) State Governments; (P) Private Sector

Reported Measures	Examples of Actual Measures and Achievement from Others <sup>1</sup>
<ul style="list-style-type: none"> <li>✓ Perceived cost reasonableness</li> <li>• Level of customer engagement/communications</li> <li>• Customer accession and attrition rates</li> <li>• Contribution to customer <u>operational</u> performance – The attributable contribution the SSC makes to the customers’ organization to improve operational efficiency.</li> <li>• Contribution to customer <u>mission</u> achievement – The attributable contribution the SSC makes to the customers’ organization that demonstrates achievement of mission requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Customer attrition rate less than 5% (P) or 15% (F)</li> <li>• Stabilized relationships with customers by ensuring payment processing was one time. Decreased late payment rate (P)</li> <li>• 98% of collections from customers without error (F)</li> </ul>

## 2. Operational Performance Measures

**Operational Performance** – the efficiency and effectiveness with which operations are performed and their outputs achieved.

Operational performance measures can be similar or unique for each line of business against an established standard. For example, all lines of business may measure process time or FTE ratios adapting it to their specific areas and with differing standards of performance (e.g., accurately processing a complete retirement package that is OPM ready within 10 days of notice by the employee). These could be related to time/speed, number of resources, unit costs, volume produced, policy adherence, etc. It always includes quality of performance. Some typical operating measures include those listed below for each functional area or line of business.

### Human Resources

Reported Measures <sup>2</sup>	Examples of Actual Measures and Achievement from Others <sup>3</sup>
<ul style="list-style-type: none"> <li>• Cost per employee and transaction for:               <ul style="list-style-type: none"> <li>✓ Development and coaching</li> <li>✓ Strategies</li> <li>✓ Information management</li> <li>✓ Recruitment and selection</li> <li>✓ Retirement processing</li> <li>✓ Performance appraisal management/processing</li> <li>✓ Promotion/redeployment</li> </ul> </li> <li>• Number of applicants per posting</li> <li>• Customer first contact time resolution on staffing actions</li> <li>• Recruitment costs per hire</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced time to hire from 100 to 68.1 days (F)</li> <li>• Payroll accuracy is 98.5% against a standard of &gt;95% (F)</li> <li>• Increased staff transfers completed to 95% within agreed to timeline (F)</li> <li>• Processed 125M pay transactions for 6m payroll customers (F)</li> <li>• Managed \$1.6T in retirement and health benefits (F)</li> <li>• Achieved 1,500 HR transactions per SSC employee per year (P)</li> </ul>

<sup>2</sup> Consideration must be given for simple, moderate, and complex assignments and transactions

<sup>3</sup> (F) U.S. Federal Government; (OF) Other (Non-U.S.) Federal Governments; (S) State Governments; (P) Private Sector

Reported Measures <sup>2</sup>	Examples of Actual Measures and Achievement from Others <sup>3</sup>
<ul style="list-style-type: none"> <li>• Time to hire; Cost to hire per employee</li> <li>• Quality of hire – satisfactory or above on first appraisal, time to be fully productive, or as reported by customer</li> <li>• Effective hiring sources</li> <li>• Time for benefits processing/Cost of benefits processing overall and per transaction</li> <li>• Failed hires – new hire attrition within first year (voluntary or involuntary)</li> <li>• Self-service portal adoption rate</li> <li>• Self-service cost vs. traditional processing comparison</li> <li>• Number of employees served per SSC employee and per overall operating costs (ratio)</li> <li>• Payroll processing cost per employee; per budget</li> <li>• HR costs as a percentage of overall budget</li> <li>• Quality – error rates/rework percentages for all HR transactions; communications, output</li> <li>• On time and accurate benefits processing</li> <li>• Transaction cost, quality, and time to execute</li> <li>• Accuracy, completeness, and security of personnel data</li> <li>• Discrimination case load per employee (open and closed)</li> <li>• Employee retention rates (voluntary and involuntary)</li> <li>• Training expense per employee</li> <li>• Trend data on call center issue type</li> <li>• Closing of call center issues on first call</li> </ul>	<ul style="list-style-type: none"> <li>• Self-Service portal adoption reached 70% (P)</li> <li>• Average HR transaction cost is less than \$300 per transaction (P)</li> <li>• Reduced payroll processing cost to &lt;\$150 per FTE per year (P)</li> <li>• Increased payroll processing accuracy rate to 96% (full electronic processing 98%) (P)</li> <li>• 90% of pre-employment packages sent to hired candidate within three business days (F)</li> <li>• 95% of all benefit processing is accurate in accordance with OPM regulations (F)</li> <li>• 98% of benefit packages/requests are processed within three business days (F)</li> <li>• Retirement estimates are 97% accurate (F)</li> <li>• 90% of all classification actions processed within 30 days (F)</li> </ul>

## Finance

Reported Measures <sup>2</sup>	Examples of Actual Measures and Achievement from Others <sup>3</sup>
<ul style="list-style-type: none"> <li>• Transaction time to populate the system</li> <li>• Journal entry rejection rates</li> <li>• Journal entry postings per FTE</li> <li>• Number of days to resolve invoice disputes</li> <li>• Number of financial professional employees per revenue amount</li> <li>• Number of financial professional employees per accounts payable transactions</li> </ul>	<ul style="list-style-type: none"> <li>• Reduction in audit actions from 20% to 5% (S)</li> <li>• Reduced cost to process an invoice from \$400 to \$89 (F)</li> <li>• Reduced cost to process an invoice to \$15 (P)</li> <li>• Increased eInvoice adoption rate to &gt;90% (P)</li> <li>• Increased system control audits to 98.1% (F)</li> <li>• Eliminated all paper from the Accounts Payable process (touchless processing) (P)</li> </ul>

<sup>2</sup> Consideration must be given for simple, moderate, and complex assignments and transactions.

<sup>3</sup> (F) U.S. Federal Government; (OF) Other (Non-U.S.) Federal Governments; (S) State Governments; (P) Private Sector

Reported Measures <sup>2</sup>	Examples of Actual Measures and Achievement from Others <sup>3</sup>
<ul style="list-style-type: none"> <li>• Number of financial professional employees per agencies or FTEs served</li> <li>• Rate of payables paid on time</li> <li>• Invoice cycle payment time manual vs. eInvoice</li> <li>• Invoices processed per month</li> <li>• Speed of manual vs. automatic reconciliations</li> <li>• Early invoice payment discount taken</li> <li>• Number of employees required to process expense reimbursements</li> <li>• Number of products/services per \$\$ spent</li> <li>• Cost of financial reporting per \$1M spent</li> <li>• Reduction in number of audits and resources applied</li> <li>• Accurate account reconciliations monthly</li> <li>• Number of FTEs required to manage all accounts – simple, moderate, complex</li> <li>• Amount of funds recovered from incorrect/improper payments as a percentage of overall funds</li> <li>• Accuracy, completeness, and security of financial data</li> <li>• Reduction in percentage of transactions flagged for escalation review</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced cost of Accounts Payable operation by 60% (P)</li> <li>• Reduced inventory costs by 25% (P)</li> <li>• 90% of invoicing and payments are processed without manual intervention (P)</li> <li>• Cost of financial management function is &lt;5% of overall budget through shared services (P)</li> <li>• 98% of payables paid on time (F)</li> <li>• No more than \$200 per \$1M in interest payments (F)</li> <li>• Decrease in incorrect payments by 80% for every one thousand incorrect payments in Accounts Payable (P)</li> </ul>

## Information Technology Services

Reported Measures <sup>2</sup>	Examples of Actual Measures and Achievement from Others <sup>3</sup>
<ul style="list-style-type: none"> <li>• Percentage of end users served per FTE</li> <li>• System uptime/reliability</li> <li>• Portal uptime/availability, ease of use</li> <li>• Cost per end user served</li> <li>• Cost as a percentage of budget</li> <li>• Number of call center tickets addressed, percentage of inquiries resolved, or issue addressed on first call – low, medium, critical</li> <li>• Percentage of calls answered within X seconds or resolution of issue on first call</li> <li>• Security of data as measured by reduction or lack of system breaches</li> </ul>	<ul style="list-style-type: none"> <li>• Resolve 75% of issues on first contact in call centers with a goal of 80% (F)</li> <li>• 98% of critical incidents triaged within 24 hrs (low seven days, medium five days) (F)</li> </ul>

<sup>2</sup> Consideration must be given for simple, moderate, and complex assignments and transactions.

<sup>3</sup> (F) U.S. Federal Government; (OF) Other (Non-U.S.) Federal Governments; (S) State Governments; (P) Private Sector



Reported Measures <sup>2</sup>	Examples of Actual Measures and Achievement from Others <sup>3</sup>
<ul style="list-style-type: none"> <li>• Self-service portal adoption rate</li> <li>• Self-service cost vs. traditional processing comparison</li> </ul>	

## Procurement

Reported Measures	Examples of Actual Measures and Achievement from Others <sup>3</sup>
<ul style="list-style-type: none"> <li>• Cost of procurement action as a percentage of spend</li> <li>• Cost to execute an RFP/RFQ/RFI or Task Orders (full cycle)</li> <li>• FTEs required to execute a procurement action</li> <li>• Amount or percentage of negotiated cost reductions</li> <li>• Total spend under management</li> <li>• Effective use of RFP content library</li> <li>• Socioeconomic goals achieved</li> <li>• Workflow system data metrics</li> <li>• Number of actions under management – simple, moderate, or complex</li> <li>• Number of competitive bids for each issuance</li> <li>• Ontime completion of process actions (time to award)</li> <li>• Performance indicators during high workload cycles</li> <li>• Reduced number of protests</li> <li>• Quality – reduced amount of redo of procurement actions, compliance with FAR</li> <li>• Ratio of RFIs/Sources Sought to RFPs/RFQs</li> <li>• Percentage of awarded and properly closed contracts against overall volume of RFP/RFQs and by FTEs and cost</li> <li>• Risk realization and difficulties during contract execution, contractor performance</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of procurement activity is 1.5% of overall spend</li> <li>• Savings as a percentage of spend is 2%</li> </ul>

## Travel and Expenses

Reported Measures	Examples of Actual Measures and Achievement from Others <sup>3</sup>
<ul style="list-style-type: none"> <li>• Number of disbursements per FTE</li> <li>• Time to approve</li> <li>• Process expense reports within X days</li> <li>• Number of T&amp;E reports processed</li> </ul>	<ul style="list-style-type: none"> <li>• Process 85% of expense reports within five days (F)</li> <li>• Reduced travel reconciliations from three hours to 30 minutes (F)</li> </ul>

<sup>3</sup> (F) U.S. Federal Government; (OF) Other (Non-U.S.) Federal Governments; (S) State Governments; (P) Private Sector

Reported Measures	Examples of Actual Measures and Achievement from Others <sup>3</sup>
<ul style="list-style-type: none"> <li>• Error rate/rework percentages as a percentage of transactions</li> </ul>	<ul style="list-style-type: none"> <li>• Travelers contact for approval within two business days (F)</li> </ul>

## Grants Management

Reported Measures <sup>4</sup>	Examples of Actual Measures and Achievement from Others <sup>3</sup>
<ul style="list-style-type: none"> <li>• Number of grants under management (announced, awarded, managed) – simple, moderate, or complex</li> <li>• Number of grants managed per FTE</li> <li>• Funding under management per FTE</li> <li>• Total cost of operations per number of grants issued ratio</li> <li>• Cost to execute a grant – announcement, award, managed, closed compared to total number of grants</li> <li>• Ontime completion of process actions</li> <li>• Days from grant announcement to award</li> <li>• Amount of staff time devoted to supporting grant applicants</li> <li>• Percentage of recipients achieving required grant outcomes</li> <li>• Reduction in grantee burden (through process, instruction clarity, technology interface, etc.)</li> <li>• Quality – error rates, funding accuracy, etc.</li> <li>• Percentage of clean audit opinions</li> <li>• Percentage of improper payments issued and recovered</li> <li>• Cost/number of FTEs required for grant monitoring</li> <li>• Time and number of grant packages prepared and disseminated post award decision</li> </ul>	<ul style="list-style-type: none"> <li>• None reported</li> </ul>

### 3. Cost Savings/Avoidance Measures

**Cost Savings/Avoidance** – the reduction in costs of performing a given line of business or activity, or the overall cost maintenance of operations. Cost savings must be systemic and not have just a one-time effect.

This is a measure of efficiency by which operations are performed as well as in comparison to standalone services. Cost savings can be accomplished through process reengineering, policy simplification, reduction in number or cost of resources, streamlined and advanced technology, etc. Cost savings can be realized

<sup>4</sup> Consideration must be given for simple, moderate, and complex assignments and transactions.

by taking actions to avoid additional or rising costs. It can also be addressed in Modernization efforts as well as Operating Performance. Typical cost savings measures are those listed below.

Reported Measures	Examples of Actual Measures and Achievement from Others <sup>6</sup>
<ul style="list-style-type: none"> <li>• Cost of a transaction/output compared to a baseline (including sustainability of the cost)</li> <li>• Cost in relation to resources expended ratios</li> <li>• Amount of available escrowed working capital against plans</li> <li>• Budget vs. actual comparison</li> <li>• Return on Investment (ROI) to the government (over a standalone function, use of technology, etc.)</li> <li>• Cost of resources by type</li> <li>• Cost of acquisition vs. sustainability of resource</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced accounting costs by 55% through technology modernization, process improvement, reduced headcount, and reduced facility footprint (P)</li> <li>• Saved \$600M in FY23 by implementing an FM shared service center (F)</li> <li>• Saved/avoided \$1.5B in operating costs by implementing a shared service center (P)</li> <li>• Saved over \$1.3B through the implementation of shared service centers (OF)</li> <li>• Reduced 3rd party spending by 10% (P)</li> <li>• Reduced benefits claims processing cost by 50% (P)</li> <li>• Increased from one cloud-based SSC to five cloud-based SSCs, which increased expected savings from 10% to 15% in operating costs (OF)</li> <li>• Price reduced 40% by moving to an SSC (P)</li> </ul>

#### 4. Modernization Measures

**Modernization** – the efficiency, effectiveness, and accomplishments based on a major transformation or improvement from current to new state and involve business necessity, customer engagement, requirements, process/policy improvement, architecture, human centered design, alternatives analysis, Cloud migration, and much more.

This could be transitioning to a shared services model, a business improvement initiative, or a technology modernization effort. This is often a one-time (and often complex) activity and has some overlap with the other measures to demonstrate initial success and Return on Investment/Expectations such as cyber security. Measuring may discontinue once the modernization effort is declared complete or continues in some form as continuous improvement takes place. It includes the initial realization of benefits and may also evolve as people, process, and technology matures. Also see #3 Cost Savings/Avoidance Measures.

Reported Measures	Examples of Actual Measures and Achievement from Others <sup>7</sup>
<ul style="list-style-type: none"> <li>• Activity/Task/Phase outcome and milestone achievement</li> <li>• Budget achievement</li> <li>• Return on investment/expectations</li> </ul>	<ul style="list-style-type: none"> <li>• Paid back initial investment of \$42M in four years (F)</li> </ul>

<sup>6</sup> (F) U.S. Federal Government; (OF) Other (Non-U.S.) Federal Governments; (S) State Governments; (P) Private Sector

<sup>7</sup> (F) U.S. Federal Government; (OF) Other (Non-U.S.) Federal Governments; (S) State Governments; (P) Private Sector

Reported Measures	Examples of Actual Measures and Achievement from Others <sup>7</sup>
<ul style="list-style-type: none"> <li>• Investment payback period</li> <li>• Savings/Avoidance compared to stand alone function or for improved operations</li> <li>• Increased throughput with touchless processing</li> <li>• FTE reduction and savings</li> <li>• Risk realization prevention</li> <li>• Successful migration to new system or cloud, process, or policy</li> <li>• Improved policy and process efficiency</li> <li>• Error rate/rework reduction</li> <li>• Adoption rates – new methods or systems (e.g., self-service, eInvoices, etc.)</li> <li>• Increased productivity</li> <li>• Customer engagement and satisfaction</li> <li>• Leadership/Stakeholder approvals</li> <li>• Reduced technology platform and O&amp;M costs</li> <li>• Facility footprint reduction</li> <li>• Improved SLAs for customers</li> </ul>	<ul style="list-style-type: none"> <li>• Reduction in required audit actions from 20% to 5% (S)</li> <li>• Reduction in staff time by all paper eliminated from the Accounts Payable process (touchless processing) (P)</li> <li>• Implemented over 65 BOTS reducing time and increasing accuracy (F)</li> <li>• Implemented BOTS to address over 5.4M transactions eliminating over 20,000 staff hours (F)</li> <li>• 16 Standalone BOTS for both internal and external services creating improved efficiency (F)</li> <li>• Reduced technology platforms from 330 to 74 (F)</li> <li>• Reduced FTEs by 55% (P)</li> <li>• Error rate reduction by 71% (P) and 15% (S)</li> <li>• Average HR error rate reduction by 15% from automation (P)</li> <li>• Global template with proven results, for a single data model, which can be leveraged across multiple regions, teams, and sectors (P)</li> </ul>

## 5. Internal Success Measures

Consistent with any organization, an SSC may want to measure its internal operations and capacity to deliver services. These may include such things as:

### Governance

- Goal Achievement
- Meeting legislative or policy mandates
- Ability to innovate and invest
- Ability to control costs
- Return on Expectations (ROE) for leaders and stakeholders
- Effectiveness of policy
- Effectiveness of decision-making or management process
- Improved ability for resource allocation

### Personnel

- Staff bench strength – numbers and skill levels
- Leadership strength
- Staff Attrition/Succession
- Percentage of employees with training and certifications

- Percentage of employees with succession plans
- Defined vs. actual culture attributes
- SSC employee engagement

### Business Development

- Outreach to customers/marketing/relationship management
- New customer acquisition rate

### Operations

- Continuous improvement
- Advisory capacity supported by data systems
- Facility footprint and cost
- Technology platform profile, cost, and functionality
- Data capacity

#### Interesting Facts

##### Top 3 Staff Skills Prioritized for SSCs\*

1. Automation
2. Data Management/Analytics
3. Process Design/Continuous Improvement

##### Workplace Model for SSCs

- 52% Hybrid, mostly home office
- 43% Hybrid, mostly in office
- 5% Fulltime in office
- 0% Fulltime virtual

\*SSON, 2022

## Data Sources and Methods

To effectively measure efficiency and effectiveness a number of sources and methods are used to capture qualitative and quantitative data to accurately assess the status and conditions of the SSC performance. Regardless of the method used the SSC must be able to put information into a form that demonstrates performance, tells a story, and provides the ability to make decisions and act on the data for management and continuous improvement.

Each area and measure will have its own approach used alone or in combination to measure performance. Some of the common data gathering methods include the following.

### Technology Based

- System data mining – cost, performance, etc.
- Workflow management system outputs and analysis
- Help desk and call center analysis of volume, trends, time to solve and close, etc.
- Staff time sheet analysis – coded by project or activity
- Use of BOTS, algorithms, AI/ML, and visualization tools to assess multiple data points
- Data reports generated from various technology platforms – data points, trends, completions, time, adoption, and more
- Customer/stakeholder input on functional and interface quality and capacity

### Financial Analysis

- Budget vs. actual expenditure analysis
- Cost/performance analysis
- Cost/benefit analysis
- Activity based cost analysis



## SSC Assessment Activity

- Process mapping and analysis
- Observing processes, activity, and decisions, in action
- Desk audits
- Interviews
- Focus groups
- Surveys
- Case study capture and review
- Journey/Experience mapping
- Risk assessments
- Staffing assessments – attrition, accession, skill, training, ratios
- SLA tracking analysis

## Contacts

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# Appendix A

## GSA's Federal Integrated Business Framework Service Measures

For more information or the latest updates go to: <https://ussm.gsa.gov/fibf/>

## Enterprise Records Management

Measure Name	Measure Description	Measure Target	Measurement Formula
Federal Record Identification Percentage	Percentage (%) of digital objects identified as a federal record or non-record	100%	Percentage of identified records relative to all digital objects
Federal Record Identification Volume	Volume of digital objects identified as a federal record or non-record	TBD by Service Customer	Volume of records in bytes
Federal Record Retention Period Assignment Compliance	Percentage (%) of federal records that are assigned a retention period	100%	Percentage of records assigned a retention period relative to all digital objects
Federal Record Litigation Hold Volume	Number of federal records locked down due to a litigation hold	TBD by Service Customer	Number of records
Federal Record Litigation Hold Time	Number of days federal records locked down due to a litigation hold	TBD by Service Customer	Number of days
Federal Record Information Request by Category Volume	Number of federal record FOIA, Congressional, PRA, or eDiscovery information requests received	TBD by Service Customer	Number of requests
Federal Record Information Request Response	Number of days to provide federal records in	TBD by Service	Number of days
Federal Record Disposal Eligibility Volume	Percentage of temporary federal records that	TBD by Service	Percentage of records identified
Federal Record Disposal Completion	Percentage of temporary federal records eligible for disposal that have been disposed of	100%	Percentage of records identified as being eligible for disposal that have been disposed of, relative to percentage of records identified as being eligible for disposal that have not yet been disposed of
Federal Record Disposal Approval Timeliness	Number of days to provide proper approval for disposal of eligible federal records after receiving notification of eligibility for disposal	<5 Government work days	Number of days
Federal Record Disposal Timeliness	Number of days to dispose of eligible federal records after receiving approval for disposal	TBD by Service Customer and media type	Number of days
Federal Temporary Record Retention Period	Number of temporary federal records for which	TBD by Service	Number of records
Federal Record Transfer Eligibility Volume	Number of permanent federal records that have met their federal records retention period but have not yet been transferred to NARA	TBD by Service Customer	Number of records
Federal Record Transfer Completion Timeliness	Number of days to remove a permanent federal	<5 Government	Number of days
Federal Permanent Record Retention Period	Number of permanent federal records for which	TBD by Service	Number of records

# HR Management Services – Talent Acquisition

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Agency TA Strategy Adoption	Determines whether the agency has adopted (i.e., written, approved, communicated to employees, and implemented) a TA strategy that includes overarching goals and priorities.	Yes	Was the TA strategy developed based on federal and agency hiring needs and priorities? Yes/No Have the TA goals and priorities been written in accordance with federal regulations and guidelines? Yes/No Have the TA goals and priorities been signed and approved by the appropriate authority? Yes/No Have the TA goals and priorities been based on/informed by a competency assessment and / or workforce planning program? Yes/No Have the TA goals and priorities been informed by the employee labor union(s) and / or collective bargaining agreement priorities, if applicable? Yes/No Have the TA objectives, goals and priorities been communicated to employees? Yes/No Have the TA objectives, goals and priorities been evaluated for progress and updated as necessary during the last fiscal year? Yes/No
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Recruitment Plan Satisfaction	Measures agency leadership satisfaction and other perceptions of the agency recruitment plan.	70%	Overall, how satisfied are you with the recruitment plan for the current fiscal year (e.g., recruiting methods, sources/events, resource allocation, and timelines) Agency leadership and agency accountability office responses to recruitment survey
Recruitment Plan Satisfaction	Measures agency leadership satisfaction and other perceptions of the agency recruitment plan.	75%	To what extent does the recruitment plan align with the prioritized objectives outlined in the agency Talent Acquisition strategy while accounting for agency constraints? Agency leadership and agency accountability office responses to recruitment survey
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Position Classification Quality Control Audit	Measures the agency quality control audit results for position classifications.	99.9%	Numerator: Total number of audited (e.g., DEU audit, agency Human Capital management evaluation) forms containing errors (e.g., title series or grade error, FLSA error) in the last fiscal year Denominator: Total number of OF-8 forms audited in the last fiscal year
Position Classification Satisfaction	Measures the extent to which the position classification process meets the needs of the hiring manager.	75%	To what extent did the position classification process meet your needs (e.g., time to complete, collaboration with you, clarity of information provided)? Hiring manager responses to hiring survey
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Job Analysis Compliance	Measures the extent to which audited job analyses are free from significant findings.	100%	Numerator: Number of audited (e.g., DEU audit, agency Human Capital management evaluation) job analyses containing no significant findings (e.g., incorrect information in the JA report such as tasks, duties or KSAs / competencies; inappropriate assessment tool or ranking method) in the last fiscal year Denominator: Total number of job analyses audited in the last fiscal year
Average Time to Complete Job Analysis (new)	Measures the average time (in days) it takes to conduct a new job analysis study.	8 Days OR according to agency established target	Numerator: Sum of the number of days elapsed from the time that the provider received all required documentation to conduct the JA until the time when the JA is returned to the requestor for review, for all new job analyses performed in the last fiscal year <i>Note: agencies should convert hours elapsed to days</i> Denominator: Total number of new job analyses performed in the last fiscal year
Average Time to Complete Job Analysis (existing)	Measures the average time (in days) it takes for an agency to review an existing job analysis report and provide relevant updates.	8 Days OR according to agency established target	Numerator: Sum of the number of days elapsed from the time that the provider received all required documentation to conduct the JA review until the time when the reviewed and updated job analysis report is returned to the requestor for review, for all existing job analyses reviewed and updated in the fiscal year Denominator: Total number of existing job analyses reports reviewed and updated in the last fiscal year <i>Note: agencies should convert hours elapsed to days</i>
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Average Time to Develop Assessment Tools	Measures the average time (in days) to develop talent acquisition assessment tools by type (assessment center, cognitive ability, integrity, job knowledge, personality, situational judgement, structured interview).	According to agency established target	Numerator: Total time elapsed from when the tool was requested until the tool and associated development report(s) was submitted for review, for all assessment tools created in the last 3 fiscal years, by type (assessment center, cognitive ability, integrity, job knowledge, personality, situational judgement, structured interview) Denominator: Total number of assessment tools acquired or developed in the last 3 fiscal years, by type (assessment center, cognitive ability, integrity, job knowledge, personality, situational judgement, structured interview) <i>Note: agencies should convert hours elapsed to days</i>
Satisfaction with Assessment Tools	Measures manager satisfaction with talent acquisition assessment tools. (Results will be obtained from the CHCOC Hiring Satisfaction Survey)	70%	On a scale from "1" to "10" where "1" is "very dissatisfied" and "10" is "very satisfied," please rate the items used for the hiring process. If an item does not apply, please select "N/A." The assessment tools used to evaluate applicants. Manager response to USSM or CHCOC survey
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Talent Acquisition System Usability	Determines whether TA system is reviewed for usability to all users.	Yes	Is the Talent Acquisition System reviewed for usability with the target population? Yes/No

# HR Management Services – Talent Acquisition (continued)

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Talent Acquisition System Administration Satisfaction	Measures user satisfaction with the administration of the Talent Acquisition system (e.g., Help Desk, usability, data accuracy).	85% positive	In the last 12 months, how satisfied were you with the administration of the Talent Acquisition System overall (e.g., Help Desk assistance, system usability, accuracy of data in the system)?  User (e.g., HR Specialist, HR Manager, Applicant) response to Agency or Provider survey
Talent Acquisition System Instruction / User Guide Satisfaction	Measures user satisfaction with Talent Acquisition system manuals, user guides, or instructions.	75% positive	In the last 12 months, how satisfied were you with the system manuals, user guides, and / or instructions that you have been provided to guide your use of the Talent Acquisition system?  User (e.g., HR Specialist, HR Manager, Applicant) response to Agency or Provider survey
Talent Acquisition System Administration Cost per Employee Served	Measures the average cost to administer all Talent Acquisition systems per employee serviced.  <i>TA system is defined as any system(s) that deliver one or more of the TA services contained in the Business Reference Model 3.0. (cost buckets to determine IT costs of TA)</i>	\$42.00	Numerator: Total cost of administering all talent acquisition systems in the last fiscal year (HRIT Spend (Federal); HRIT Spend (Contractor/Outsourcing); Other Outsourcing/Contracting Costs; Shared Service Provider Fees)  <i>HRIT Spend (Federal) includes the cost to develop, maintain, and operate HRIT systems for Talent Acquisition systems (TAS). HRIT Spend does not include total fees paid to an HR LOB shared service center or payroll provider. Per the OMB 53 guidelines, salaries, benefits, and overhead/G&amp;A for IT employees that work for the HR organization and are responsible for HRIT systems employees should be included in the HRIT cost. Whenever possible, these fee totals should be broken out according to the following definition: Federal HRIT Employees' Salaries Benefits, Overhead/G&amp;A includes all HRIT federal employees that support anything related to HRIT services and systems for Talent Acquisition systems (TAS). Federal HRIT Employees' Overhead/G&amp;A may include items such as office supplies, building fees, printing/ mailing costs, etc. We recommend that agencies utilize their HR budgets or financial systems to obtain cost data. If you are unable to obtain cost data through those two sources we would recommend that you use the OMB prescribed rates for the civilian full fringe rate and for overhead costs. Please note there are different</i>
Talent Acquisition Job Posting System Administration Cost per Accession	Measures the average cost to administer the Talent Acquisition system that posts job announcements (e.g., to USAJobs) per accession.	\$361.00	Numerator: Total cost of administering the talent acquisition system that posts job announcements (e.g., to USAJobs) in the last fiscal year (HRIT Spend (Federal); HRIT Spend (Contractor/Outsourcing); Other Outsourcing/Contracting Costs; Shared Service Provider Fees) Denominator: Total number of accessions in the last fiscal year  <i>HRIT Spend (Federal) includes the cost to develop, maintain, and operate HRIT systems that post job announcements (e.g., to USAJobs). HRIT Spend does not include total fees paid to an HR LOB shared service center or payroll provider. Per the OMB 53 guidelines, salaries, benefits, and overhead/G&amp;A for IT employees that work for the HR organization and are responsible for HRIT systems employees should be included in the HRIT cost. Whenever possible, these fee totals should be broken out according to the following definition: Federal HRIT Employees' Salaries Benefits, Overhead/G&amp;A includes all HRIT federal employees that support anything related to HRIT services and systems that include posting job announcements (e.g., to USAJobs). Federal HRIT Employees' Overhead/G&amp;A may include items such as office supplies, building fees, printing/ mailing costs, etc. We recommend that agencies utilize their HR budgets or financial systems to obtain cost data. If you are unable to obtain cost data through those two sources we would recommend that you use the OMB prescribed rates for the civilian full fringe rate and for overhead costs. Please note there are different rates for employees / occupational specialties. HRIT Spend (Contracting/Outsourcing) includes the cost to develop, maintain, and operate HRIT systems that post job announcements (e.g., to USAJobs). Costs should include HRIT-specific outsourcing/contractor costs and other costs (You may use the cost information you provide in your OMB Exhibit 53 or the information you provided during the most recent HR LOB Cost Benefit Analysis; however, please be sure that fees paid to an HR LOB shared service or payroll provider and non-IT contractor costs are reported separately.) Per the OMB 53 guidelines, salaries, benefits, and overhead/G&amp;A for IT employees that work for the HR organization and are responsible for HRIT systems employees should be included in the HRIT cost. Whenever possible, these fee totals for Contractor / Outsourcing HRIT Employees' Salaries Benefits, Overhead/G&amp;A should be broken out according to the same segments as listed above for Federal HRIT employees' salaries and benefits for HRIT systems that post job announcements. Other Outsourcing/Contractor Costs includes any costs related to services you obtain from either another Federal entity or a private sector organization. Please do not include costs related to contractors that you consider to be adjunct staff as they should be incorporated into your costs for your HR employees. Please do not include costs</i>
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Talent Acquisition Data Availability Satisfaction	Measures users' satisfaction with the availability of all Talent Acquisition data (data fields, reports, records, and meta data).	80%	In the last 12 months, how satisfied are you with the availability of: - Talent Acquisition data fields - Talent Acquisition Reports - Talent Acquisition Records - Talent Acquisition Metadata  User response to Agency or Provider survey
Talent Acquisition Data Accuracy	Measures the accuracy of Talent Acquisition case files and / or reports.	99.1%  OR  according agency established target	Numerator: # of audits completed without any errors (e.g., administrative error, regulatory error, difference between reported value and true value) Denominator: # of total audits completed
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No



# HR Management Services – Talent Acquisition (continued)

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Cost per Referred Candidate	Measures the average cost to source candidates referred (competitive and non-competitive) for agency positions.	\$1,800.00	Numerator: Total cost required to identify all candidates referred (competitive and non-competitive) for their respective positions in the last fiscal year (HR Salaries, Benefits and Overhead/G&A; HRIT Spend (Federal); HRIT Spend (Contractor/Outsourcing); Other Outsourcing/Contracting Costs; Shared Service Provider Fees) Denominator: Total number of candidates referred (competitive and non-competitive) for their respective positions in the last fiscal year  <i>HR Employees' Salaries and Benefits includes all employees residing in HR organizations throughout the agency that perform candidate sourcing and referral activities. This includes Federal HR employees who solely HR work as their main job function and report directly to the HR organization. This should not include HRIT employees as those are to be included in HRIT Spend (Federal). EEO and Diversity and Inclusion are not included in this reporting.</i> <i>HR Employees' Overhead/G&amp;A may include items such as office supplies, building fees, printing/ mailing costs, etc. We recommend that agencies utilize their HR budgets or financial systems to obtain cost data. If you are unable to obtain cost data through those two sources we recommend that you use the OMB prescribed rates for the civilian full fringe rate and for overhead costs. Please note there are different rates for employees such as Air Traffic Controllers, Firefighters, and Law Enforcement.</i> <i>HRIT Spend (Federal) includes the cost to develop, maintain, and operate HRIT systems for candidate sourcing and referral activities. HRIT Spend does not include total fees paid to an HR LOB shared service center or payroll provider. Per the OMB 53 guidelines, salaries, benefits, and overhead/G&amp;A for IT employees that work for the HR organization and are responsible for HRIT systems employees should be included in the HRIT cost. Whenever possible, these fee totals should be broken out according to the following definition: Federal HRIT Employees' Salaries Benefits, Overhead/G&amp;A includes all HRIT federal employees that support anything related to HRIT services and systems for candidate sourcing and referral activities. Federal HRIT Employees' Overhead/G&amp;A may include items such as office supplies, building fees, printing/ mailing costs, etc. We recommend that agencies utilize their HR budgets or financial systems to obtain cost data. If you are unable to obtain cost data through those two sources we would recommend that you use the OMB prescribed rates for the civilian full fringe rate and for overhead costs. Please note there are different rates for employees / occupational specialties.</i> <i>HRIT Spend (Contracting/Outsourcing) includes the cost to develop, maintain, and operate HRIT systems for candidate sourcing and referral activities. Costs should include HRIT-specific outsourcing/contractor costs and other</i>
Representation Objectives Compliance: Core Occupational Specialties	Measures results for attracting applicants in accordance with agency recruitment targets for core occupational specialties.	According to agency established target	Numerator: Total number of applicants per agency-identified core occupational specialty in the last fiscal year, by occupational specialty Denominator: Agency recruiting target for the last fiscal year, by occupational specialty
Representation Objectives Compliance: Mission-Critical and Agency Priority Occupations	Measures results for attracting applicants in accordance with agency recruitment targets for mission-critical and agency priority occupations (e.g., (MD-715, FEORP, DVAAP)	According to agency established target	Numerator: Total number of applicants per mission-critical and agency priority occupation (e.g., (MD-715, FEORP, DVAAP) in the last fiscal year, by mission-critical and agency priority occupation Denominator: Agency recruiting target for the last fiscal year, mission-critical and agency priority occupation
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Average Time to Post Job Opportunity Announcement	Measures the average time (in days) to build, modify, approve, and post job announcements that accurately reflect the job specifications to OPM's USAJOBS.	2 calendar days  OR  according to agency established target	Numerator: Total time to build, modify, approve, and post job announcements that accurately reflect the job specifications to OPM's USAJOBS, after the classified PD, approved job analysis, assessment, and other agency requirements were received, for all JOAs posted in the last fiscal year <i>Note: agencies should convert work hours elapsed to days. This calculation should not include non-business days (e.g., weekends and holidays where no work was performed) or days during which the post was pending due to hiring manager request for a specific day to post.</i>  Denominator: Total number of job opportunity announcements posted in the last fiscal year
Job Opportunity Announcement Satisfaction	Measures managers' satisfaction with the degree to which job opportunity announcements are written in accordance with the Plain Language Act of 2010.	70%	How satisfied are you with the degree to which your agency's job opportunity announcements are written in accordance with the Plain Language Act of 2010?  Manager response to USSM or CHCOC survey
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Average Time to Complete List of Eligible & Basically Qualified Candidates	Measures the average time (in days) to complete the list of candidates that are eligible and basically qualified for positions or special hiring authorities	15 Days  OR  according to agency established target	Total time to review applications to determine if basic qualifications were met, verify basic eligibility for the position, and complete determination(s), including special hiring authorities, for all applications reviewed in the last fiscal year DIVIDED BY Total number of announcements posted for which applications were reviewed and a list of candidates that were eligible and basically qualified were completed in the last fiscal year
Applicant Eligibility & Basic Qualification Review Quality Control Audit	Measures the agency quality control audit results for applicant eligibility and basic qualification reviews.	99.9%	Numerator: Total number of audited (e.g., DEU audit) applicant eligibility and basic qualification reviews containing errors (as defined in the DEU Handbook) in the last fiscal year Denominator: Total number of applicant eligibility and basic qualification reviews audited in the last fiscal year
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Average Time to Administer Assessment Tool	Measures average time (in days) required from initial review of qualifications through completion of assessment tool administration by type (assessment center, cognitive ability, integrity, job knowledge, personality, situational judgement, structured interview).	According to agency established target	Numerator: Total time elapsed between the initial review of candidate qualifications through completion of talent acquisition assessments for all assessment tools administered in the last fiscal year, by type (assessment center, cognitive ability, integrity, job knowledge, personality, situational judgement, structured interview) <i>Note: agencies should convert hours elapsed to days</i> Denominator: Total number of candidates assessed in the last fiscal year, by type of assessment tool

## HR Management Services – Talent Acquisition (continued)

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Average Cost Per Assessment Tool Administration	Measures the average cost to administer each assessment tool by type (assessment center, cognitive ability, integrity, job knowledge, personality, situational judgement, structured interview).	According to agency established target	<p>Numerator: Total cost of administering each assessment tool in the last fiscal year (HR Salaries, Benefits and Overhead/G&amp;A; HRIT Spend (Federal); HRIT Spend (Contractor/Outsourcing); Other Outsourcing/Contracting Costs; Shared Service Provider Fees), by type (assessment center, cognitive ability, integrity, job knowledge, personality, situational judgement, structured interview)</p> <p>Denominator: Total number of assessment tool administrations in the last fiscal year, by type</p> <p><i>HR Employees' Salaries and Benefits includes all employees residing in HR organizations throughout the agency that perform candidate assessment and assessment development activities for each assessment type. This includes Federal HR employees who solely perform HR work as their main job function and report directly to the HR organization. This should not include HRIT employees as those are to be included in HRIT Spend (Federal). EEO and Diversity and Inclusion are not included in this reporting. HR Employees' Overhead/G&amp;A may include items such as office supplies, building fees, printing/ mailing costs, etc. We recommend that agencies utilize their HR budgets or financial systems to obtain cost data. If you are unable to obtain cost data through those two sources we recommend that you use the OMB prescribed rates for the civilian full fringe rate and for overhead costs. Please note there are different rates for employees such as Air Traffic Controllers, Firefighters, and Law Enforcement. HRIT Spend (Federal) includes the cost to develop, maintain, and operate HRIT systems that perform candidate assessment activities for each assessment type. HRIT Spend does not include total fees paid to an HR LOB shared service center or payroll provider. Per the OMB 53 guidelines, salaries, benefits, and overhead/G&amp;A for IT employees that work for the HR organization and are responsible for HRIT systems employees should be included in the HRIT cost. Whenever possible, these fee totals should be broken out according to the following definition: Federal HRIT Employees' Salaries Benefits, Overhead/G&amp;A includes all HRIT federal employees that support anything related to HRIT services and systems that perform candidate assessment activities for each assessment type. Federal HRIT Employees' Overhead/G&amp;A may include items such as office supplies, building fees, printing/ mailing costs, etc. We recommend that agencies utilize their HR budgets or financial systems to obtain cost data. If you are unable to obtain cost data through those two sources we would recommend that you use the OMB prescribed rates for the civilian full fringe rate and for overhead costs. Please note there are different rates for employees / occupational specialties.</i></p> <p><i>HRIT Spend (Contracting/Outsourcing) includes the cost to develop, maintain, and operate HRIT systems that</i></p>
Average Cost to Assess Candidates	Measures the average cost to assess candidates by occupational series.	According to agency established target	<p>Numerator: Total cost of administering all talent acquisition assessments in the last fiscal year (HR Salaries, Benefits and Overhead/G&amp;A; HRIT Spend (Federal); HRIT Spend (Contractor/Outsourcing); Other Outsourcing/Contracting Costs; Shared Service Provider Fees), by occupational series</p> <p>Denominator: Total number of candidates assessed in the last fiscal year, by occupational series</p> <p><i>HR Employees' Salaries and Benefits includes all employees residing in HR organizations throughout the agency that perform candidate assessment and assessment development activities. This includes Federal HR employees who solely perform HR work as their main job function and report directly to the HR organization. This should not include HRIT employees as those are to be included in HRIT Spend (Federal). EEO and Diversity and Inclusion are not included in this reporting. HR Employees' Overhead/G&amp;A may include items such as office supplies, building fees, printing/ mailing costs, etc. We recommend that agencies utilize their HR budgets or financial systems to obtain cost data. If you are unable to obtain cost data through those two sources we recommend that you use the OMB prescribed rates for the civilian full fringe rate and for overhead costs. Please note there are different rates for employees such as Air Traffic Controllers, Firefighters, and Law Enforcement. HRIT Spend (Federal) includes the cost to develop, maintain, and operate HRIT systems that perform candidate assessment activities. HRIT Spend does not include total fees paid to an HR LOB shared service center or payroll provider. Per the OMB 53 guidelines, salaries, benefits, and overhead/G&amp;A for IT employees that work for the HR organization and are responsible for HRIT systems employees should be included in the HRIT cost. Whenever possible, these fee totals should be broken out according to the following definition: Federal HRIT Employees' Salaries Benefits, Overhead/G&amp;A includes all HRIT federal employees that support anything related to HRIT services and systems that perform candidate assessment activities. Federal HRIT Employees' Overhead/G&amp;A may include items such as office supplies, building fees, printing/ mailing costs, etc. We recommend that agencies utilize their HR budgets or financial systems to obtain cost data. If you are unable to obtain cost data through those two sources we would recommend that you use the OMB prescribed rates for the civilian full fringe rate and for overhead costs. Please note there are different rates for employees / occupational specialties.</i></p> <p><i>HRIT Spend (Contracting/Outsourcing) includes the cost to develop, maintain, and operate HRIT systems that perform candidate assessment activities. Costs should include HRIT-specific outsourcing/contractor costs and other costs (You may use the cost information you provide in your OMB Exhibit 53 or the information you provided during</i></p>
Average Time to Complete Certificate of Eligibles	Measures the average time (in days) to conduct assessment, review assessment results, rank qualified candidates, make final list of candidates, and submit the Certificate of Eligibles to the hiring manager. <i>Note: Excludes supplemental certs, i.e., registers, open continuous</i>	16 Days OR according to agency established target	<p>Numerator: Total time required to conduct assessment, review assessment results, rank qualified candidates, make final list of candidates, and submit the Certificate of Eligibles to the hiring manager for all certificates of eligibles, excluding supplemental certs, posted in the last fiscal year</p> <p>Denominator: Total number of certificates of eligibles completed in the last fiscal year for which an assessment was employed</p>
Certificate of Eligibles Satisfaction	Measures managers' satisfaction with the selection of final candidates for the Certificate of Eligibles	70%	<p>On a scale from "1" to "10" where "1" is "strongly disagree" and "10" is "strongly agree," please rate the applicant quality on the following. Applicants referred had the skills to perform the job.</p> <p>On a scale from "1" to "10" where "1" is "poor" and "10" is "excellent," please rate the timeliness of the hiring process on the following. Timeliness of receiving the certificate of eligibles (cert) from the HR Office (please note the benchmark timeframe is 16 days from the closing date of the announcement)</p> <p>Manager response to USSM or CHCOC survey</p>
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Suitability and Security Clearance Form Return Rate	Measures the rate at which the agency security office returns pre-eQIP suitability and security clearance forms (e.g., OF-306) to HR due to incomplete or inaccurate information.	TBD	<p>Numerator: Total number of pre-eQIP suitability and security clearance forms (e.g., OF-306) returned by the agency security office to HR due to incomplete or inaccurate information in the last fiscal year</p> <p>Denominator: Total number of initial suitability and security clearance cases initiated in the last fiscal year</p>
Average Time to Complete Formal Job Offer (Post-Adjudication)	Measures the average time (in days) to update the employee eOPF with the appropriate certificate, acknowledge results of the investigation, notify applicant/selectee and hiring manager of results, provide options for hiring, and extend the formal job offer.	2 days OR according to agency established target	<p>Numerator: Total time between the receipt of a positively adjudicated Record of Investigation and the extension of the formal job offer for all job offers extended in the last fiscal year by investigative tier</p> <p>Denominator: Total number of formal job offers extended in the last fiscal year by investigative tier</p>
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Quality Assessment Reporting Completion Rate: All Investigations	Measures the percent of received background investigations for which the agency completes quality assessment reporting in accordance with the Quality Assessment Standards for Background Investigations.	Minimum of 5% of background investigations	<p>Numerator: Total number of background investigations reviewed in the last fiscal year for which the agency completed quality assessment reporting</p> <p>Denominator: Total number of background investigations reviewed by the agency in the last fiscal year</p>

# HR Management Services – Talent Acquisition (continued)

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Average Time to Complete Clearance Adjudications for the Fastest 90%	Measures the average time (in days) between the date that the background investigation was forwarded or received electronically for each case until the date of clearance determination for the fastest 90% by tier.  NOTE - The fastest 90% include: - Top secret investigations completed in an average of 80 days (investigations completed in an average of 60 days, adjudications in an average of 20 days) - Secret investigations completed in an average of 60 days (investigations completed in an average of 40 days, adjudications in an average of 20 days) - Periodic reinvestigations completed in an average of 180 days (investigations completed in 150 days, adjudications in an average of 30 days)	Secret and Top Secret: 20 Days Periodic Reinvestigation: 30 Days	Numerator: Total number of days elapsed between date that the background investigation was forwarded or electronically received and the date of clearance determination for the fastest 90% of end-to-end national security cases completed in the last fiscal year, by secret, top secret, and periodic reinvestigation Denominator: Total number of end-to-end national security cases completed in the last fiscal year that comprise the fastest 90%, by secret, top secret, and periodic reinvestigation
Adjudication Reporting Timeliness for Unfavorable Suitability Determinations	Measures the percent of unfavorable suitability actions for which the agency completes reporting in accordance with 5 CFR 731.203(g).	100%	Numerator: Total number of unfavorable suitability actions taken in the last fiscal year for which the agency completed OPM reporting within 30 days of taking the action Denominator: Total number of unfavorable suitability actions taken in the last fiscal year
Adjudication Reporting Timeliness for All Actions Taken Based Upon an OPM Investigation	Measures the percent of all actions taken based upon OPM investigations for which the agency completes reporting in accordance with 5 CFR 731.203(g).	100%	Numerator: Total number of all actions taken in the last fiscal year based upon OPM investigations for which the agency completed OPM reporting in 90 days or less Denominator: Total number of all actions taken in the last fiscal year based upon OPM investigations
eOPF Documentation Accuracy	Measures the accuracy of required documentation being submitted for inclusion in the subject's electronic official personnel folder (eOPF) (e.g. Certificate of Investigation, Standard Form 50).	100%	Numerator: Total number of audited eOPFs that contained required documentation in the last fiscal year Denominator: Total number of audited eOPFs in the last fiscal year
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Average Time to Issue Tentative Job Offer	Measures the average time (in days) between when the signed certificate and accompanying paperwork (where necessary) is received by the HR Office until the extension of the conditional or tentative job offer.	3 calendar days  OR  according to agency established target	Numerator: Total time elapsed between when the signed certificate and accompanying paperwork (where necessary) is received by the HR Office until the extension of the conditional or tentative job offer for all conditional or tentative job offers extended in the last fiscal year Note: agencies should convert hours elapsed to days Denominator: Total number of conditional or tentative job offers extended in the last fiscal year
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Employment Offer Satisfaction with HR Communication & Support	Measures hiring managers' satisfaction with collaboration with the HR provider for employment offers.	75%	In the last 12 months, how satisfied are you with the collaboration support from your HR provider regarding options for negotiating salary and other conditions for employment (e.g., incentives, relocation packages) for new hires? Hiring manager responses to hiring survey
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
New Hire Satisfaction with HR In-processing Communication	Measures new hires' satisfaction with communications received from the HR provider during in-processing.	75%	Overall, how satisfied are you with the communication that you received from the HR provider during new hire in-processing (e.g., procedural updates, security materials, administrative and logistical support)? New Hire response to hiring survey
Average Time Between Tentative and Formal Job Offer	Measures the average time (in days) between the acceptance of the tentative job offer until the time that the formal job offer is extended.	12 calendar days  OR  according to agency established target	Numerator: Total number of days elapsed between the acceptance of the tentative job offer until the time that the formal job offer is extended for all formal job offers extended in the last fiscal year Note: agencies should convert hours elapsed to days Denominator: Total number of formal job offers extended in the last fiscal year
Average Time to In-process New Hires	Measures the average time (in days) between employee EOD until the submission of documents needed to appoint a new employee.	14 Days  OR  according to agency established target	Numerator: Total number of days elapsed between the employee EOD until the submission of documents needed to appoint a new employee for all employees in-processed in the last fiscal year Note: agencies should convert hours elapsed to days Denominator: Total number of employees in-processed in the last fiscal year
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Satisfaction with New Hire Orientation	Measures new hire satisfaction with new hire orientation	70%	Overall, how satisfied are you with information that you received in the new hire orientation program? New Hire response to survey
Satisfaction with New Hire Orientation	Measures new hire satisfaction with new hire orientation	75%	Please rate the extent to which the new hire orientation prepared you to begin work at the agency. New Hire response to survey
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Orientation Cost per Position Filled	Measures the average cost to provide the orientation program to a new hire	\$97.00	Numerator: Total cost of administering the orientation program in the last fiscal year (HR Salaries, Benefits and Overhead/G&A; HRIT Spend (Federal); HRIT Spend (Contractor/Outsourcing); Other Outsourcing/Contracting Costs; Shared Service Provider Fees) Denominator: Total number of positions filled in the last fiscal year  <i>HR Employees' Salaries and Benefits includes all employees residing in HR organizations throughout the agency that perform new employee orientation activities. This includes Federal HR employees who solely perform HR work as their main job function and report directly to the HR organization. This should not include HRIT employees as those are to be included in HRIT Spend (Federal). EEO and Diversity and Inclusion are not included in this reporting. HR Employees' Overhead/G&amp;A may include items such as office supplies, building fees, printing/mailing costs, etc. We recommend that agencies utilize their HR budgets or financial systems to obtain cost data. If you are unable to obtain cost data through those two sources we recommend that you use the OMB prescribed rates for the civilian full fringe rate and for overhead costs. Please note there are different rates for employees such as Air Traffic Controllers, Firefighters, and Law Enforcement.</i> <i>HRIT Spend (Federal) includes the cost to develop, maintain, and operate HRIT systems for new employee orientation activities. HRIT Spend does not include total fees paid to an HR LOB shared service center or payroll provider. Per the OMB 53 guidelines, salaries, benefits, and overhead/G&amp;A for IT employees that work for the HR organization and are responsible for HRIT systems employees should be included in the HRIT cost. Whenever possible, these fee totals should be broken out according to the following definition: Federal HRIT Employees' Salaries Benefits, Overhead/G&amp;A includes all HRIT federal employees that support anything related to HRIT services and systems for new employee orientation activities. Federal HRIT Employees' Overhead/G&amp;A may include items such as office supplies, building fees, printing/mailing costs, etc. We recommend that agencies utilize their HR budgets or financial systems to obtain cost data. If you are unable to obtain cost data through those two sources we would recommend that you use the OMB prescribed rates for the civilian full fringe rate and for overhead costs. Please note there are different rates for employees / occupational specialties.</i> <i>HRIT Spend (Contracting/Outsourcing) includes the cost to develop, maintain, and operate HRIT systems for new employee orientation activities. Costs should include HRIT-specific outsourcing/contractor costs and other costs (You may use the cost information you provide in your OMB Exhibit 53 or the information you provided during the most</i>

## HR Management Services – Talent Acquisition (continued)

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Satisfaction with Onboarding	Measures new hire satisfaction with onboarding processes and materials	70%	Please rate the clarity of the materials provided to you during the onboarding process (e.g., handbooks, guides, organizational charts, contact lists)? Overall, How satisfied are you with the support that you received during the onboarding process (e.g., facility tours, benefits enrollment, security and ID process assistance)?  New Hire response to survey
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No

# HR Management Services – Talent Development

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Agency TD Strategy Adoption	Determines whether the agency has adopted (i.e., written, approved, communicated to employees, and implemented) a TD strategy that includes overarching goals and priorities.	Yes	Was the TD strategy developed based on the agency HCM environment and priorities? Yes/No Have the TD goals and priorities been written in accordance with federal regulations and guidelines? Yes/No Have the TD goals and priorities been signed and approved by the appropriate authority? Yes/No Have the TD goals and priorities been based on/informed by a competency assessment program? Yes/No Have the TD goals and priorities been communicated to employees? Yes/No Have the TD objectives, goals and priorities been evaluated for progress and updated as necessary during the last fiscal year? Yes/No
Business Requirement Compliance	Measures whether all published federal business requirements for the service in question have been met.	100%	Have all published federal business requirements for the service in question been met? Yes/No
TD Program Usage, Non-mandatory training	Measures the percentage of targeted employees that utilize non-mandatory TD program during the fiscal year. <i>Note: targeted employees are those personnel for whom the TD program in question has been designed</i>	65%	Numerator: # of targeted employees that completed non-mandatory agency TD programs during the fiscal year <i>Note: targeted employees are those personnel for whom the TD program in question has been designed</i> Denominator: total # of targeted employees
TD Program Usage, Mandatory training	Measures the percentage of targeted employees that utilize mandatory TD program during the fiscal year. <i>Note: targeted employees are those personnel for whom the TD program in question has been designed</i>	100%	Numerator: # of targeted employees that completed mandatory agency TD programs during the fiscal year Denominator: total # of targeted employees <i>Note: targeted employees are those personnel for whom the TD program in question has been designed</i>
TD Goal Attainment	Using an agreed-upon, clearly defined process, measures the percentage of TD programs goals met during the last fiscal year.	70%	Numerator: # of TD program goals met in the last fiscal year, as measured by a clearly defined process agreed upon with the agency Denominator: total # of TD program goals scheduled for completion in the last fiscal year
Business Requirement Compliance	Measures whether all published federal business requirements for the service in question have been met.	100%	Have all published federal business requirements for the service in question been met? Yes/No
Knowledge Management Policy Adoption	Determines whether the agency has adopted (i.e., written, approved, communicated to employees, and implemented) a knowledge management policy that mandates the capture of institutional knowledge (e.g., lessons learned, After Action Reviews) following the completion of significant milestones.	Yes	Has the knowledge management policy been written in accordance with all relevant federal government policy requirements? Yes/No Has the knowledge management policy been signed and approved by the appropriate authorities? Yes/No Has the knowledge management policy been communicated to employees? Yes/No Has the knowledge management policy been reviewed, and updated as required? Yes/No
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Knowledge Management Framework Capabilities	Measures whether the knowledge management framework capabilities provide sufficient functionality to meet agency requirements.	Yes	Does the knowledge management framework allow for cross training of agency employees? Yes/No Does the knowledge management framework provide access to knowledge and content across agency departments / bureaus? Yes/No Does the knowledge management framework provide the ability to capture lessons learned as needed? Yes/No Does the knowledge management framework interface with a learning management solution to allow employees to view non-traditional learning opportunities? Yes/No
Business Requirement Compliance	Measures whether all published federal business requirements for the service in question have been met.	100%	Have all published federal business requirements for the service in question been met? Yes/No
Employee Perception of Skill Level Improvement	Measures employee's perceptions of whether the skill level in their work units have improved in the last year.	TBD: base on 2015 results	The skill level in my work unit has improved in the last year  Employee responses to FEVS question, parsed to selection of non-supervisory role in demographics
Supervisory Perception of Skill Level Improvement	Measures supervisor's perceptions of whether the skill level in their work units have improved in the last year.	TBD: base on 2015 results	The skill level in my work unit has improved in the last year  Employee responses to FEVS question, parsed to selection of supervisory role in demographics
Competency Assessment Rate - Mission Critical	Measures whether mission critical employees' skills were assessed against a competency model, and gaps identified, in the fiscal last year.	Yes	Have mission critical employees' skills been assessed against an established competency model, and gaps identified where applicable, in the last fiscal year? Yes/No
Competency Assessment Rate - Non-Mission Critical	Measures whether non-mission critical employees' skills were assessed against a competency model, and gaps identified, in the fiscal last year, in the last year.	Yes	Have non-mission critical employees' skills been assessed against an established competency model, and gaps identified where applicable, in the last fiscal year? Yes/No
Business Requirement Compliance	Measures whether all published federal business requirements for the service in question have been met.	Yes	Have all published federal business requirements for the service in question been met? Yes/No
Coaching Program Compliance	Determines whether the Agency Coaching Program includes the procedures and requirements for maintaining certified coaches, developing and executing coaching agreements, and providing recommendations for coachee next steps.	Yes	The coaching program includes the procedures and requirements for maintaining a group of trained, qualified, and certified coaches. Yes/No The coaching program includes the procedures and requirements for developing coaching agreements. Yes/No The coaching program includes the procedures and requirements for executing coaching agreements. Yes/No The coaching program includes the procedures and requirements for providing the coachee with recommended next steps per the coaching agreement. Yes/No
Employee Utilization of Coaching	Measures the percentage of employees, to whom coaching has been made available, that utilize coaching services.	50%	Numerator: # of employees that utilized a coaching service Denominator: # of employees to whom coaching has been made available
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Business Requirement Compliance	Measures whether all published federal business requirements for the service in question have been met.	100%	Have all published federal business requirements for the service in question been met? Yes/No
Agency Leadership Program Effectiveness	Determines whether the leadership development program is addressing known performance / knowledge gaps, and / or building proficiency in identified leadership competencies.	Yes	Are the behavioral outcomes of the leadership development program evaluated to determine whether they are consistent with program goals and objectives (e.g., Kirkpatrick Level 3 evaluation)? Yes / No
Supervisory Training and Development Compliance	Determines whether the Supervisory Development Program (SDP) supports the systematic training and development of supervisors and managers in accordance with all relevant regulations and policies (e.g., CFR 412.202, agency supervisor development policy).	Yes	The SDP provides supervisors and managers with additional training on the use of appropriate actions, options, and strategies to mentor employees. Yes/No The SDP provides supervisors and managers with additional training on the use of appropriate actions, options, and strategies to improve employee performance and productivity. Yes/No The SDP provides supervisors and managers with additional training on the use of appropriate actions, options, and strategies to conduct employee performance appraisals in accordance with agency appraisal systems. Yes/No The SDP provides supervisors and managers with additional training on the use of appropriate actions, options, and strategies to identify and assist employees with unacceptable performance. Yes/No
Graduate Promotion Rate	Measures the percent of graduates promoted within 12 months of leadership program completion. <i>Note: the program must be designed for promotion, e.g. SES CDP</i>	Over 60%	Numerator: # of graduates promoted within 12 months of leadership development program completion <i>Note: the program must be designed for promotion, e.g. SES CDP</i> Denominator: Total # of candidates that graduated a leadership development program <i>Note: the program must be designed for promotion, e.g. SES CDP</i>
Graduation Rate	Measures the percent of participants that completed the leadership development program in the last 12 months.	Over 60%	Numerator: # of leadership development program participants that completed the program in the last 12 months Denominator: Total # of leadership development program participants that enrolled in the program in the last 12 months
Business Requirement Compliance	Measures whether all published federal business requirements for the service in question have been met.	100%	Have all published federal business requirements for the service in question been met? Yes/No
Agency IDP Adoption	Measures whether an agency has implemented and requires a formal IDP process for all employees.	Yes	Has the agency implemented a formal IDP process? Yes/No Is the IDP process required for all employees? Yes/No



# HR Management Services – Talent Development (Continued)

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Employee IDP Process Collaboration	Measures whether the IDP process requires collaboration between the employee and the supervisor.	Yes	Does the IDP process require collaboration between the employee and the employee's supervisor? Yes/No
IDP Development Plan	Measures whether the IDP tool allows creation of an actionable development plan.	Yes	Does the IDP tool provide functionality that allows the creation of an actionable development plan? Yes/No
Employee IDP Outcome Effectiveness	Measures whether the IDP process resulted in actions contributing to individual goals and the agency mission.	TBD	Numerator: # of audited agency IDPs containing actions contributing to individual goals or the agency mission that were certified as complete in the last year Denominator: Total # of audited agency IDPs created in the last year containing planned actions contributing to individual goals or the agency mission
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Have all published federal business requirements for the service in question been met? Yes/No
Mentoring Program Compliance	Measures whether a mentoring program exists at the agency that includes procedures and requirements to: match mentors with mentees, allow mentors and mentees to apply for the program, provide training for mentors, evaluate the effectiveness of the program, and communicate its benefits.	Yes	The mentoring program includes procedures and requirements to match appropriate mentors with mentees. Yes/No The mentoring program includes procedures and requirements to promote its benefits. Yes/No The mentoring program includes procedures and requirements to evaluate the effectiveness of the program. Yes/No The mentoring program includes procedures and requirements to provide training for mentors. Yes/No
Mentoring Program Satisfaction	Measures employees' overall satisfaction with the formal mentorship program, if applicable.	70% positive	Overall, how satisfied are you with the formal mentorship program? How satisfied are you with the ability of the formal mentorship program to locate and connect you with an appropriate mentor? Mentee, Mentor, and Supervisor response to Agency or Provider Mentorship Program survey <i>Note: include N/A response option.</i>
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Have all published federal business requirements for the service in question been met? Yes/No
Training Course Objectives	Measures whether objectives have been established for training courses based on the results of agency needs analyses.	Yes	Have objectives for the course been established based on the results of an agency needs assessment? Yes/No
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Training Course Evaluation	Determines whether the training course is designed and managed to support evaluation against objectives (e.g. Kirkpatrick, Phillips).	Yes	Is the course designed to support evaluation against objectives (e.g., Kirkpatrick, Phillips)? Yes/No - Impressions / Reactions - Learning - Behaviors / Implementation - Results / Business Impact - ROI  Does the agency evaluate the course against objectives (e.g., Kirkpatrick, Phillips)? Yes/No - Impressions / Reactions - Learning - Behaviors / Implementation - Results / Business Impact - ROI  Is the training course evaluated for usability for the target population? Yes/No Are the necessary processes and operational support available to use the results of evaluations to remediate and / or discontinue the course if it does not meet objectives? Yes/No
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Have all published federal business requirements for the service in question been met? Yes/No
Job Specific Qualification Objectives	Measures whether the agency provides job-specific training to mission critical occupations (MCOs) using accepted training practices.	Yes	Have all published federal business requirements for the service in question been met? Yes/No Has the agency used a needs assessment to establish objectives for MCO job-specific training? Yes/No Is the MCO job-specific training designed to support evaluation against objectives (e.g., Kirkpatrick, Phillips)? Yes/No Does the agency provide job-specific training to MCOs? Yes/No Does the agency evaluate the MCO job-specific training against objectives (e.g., Kirkpatrick, Phillips)? Yes/No
Business Requirement Compliance	Measures whether all published federal business requirements for the service in question have been met.	100%	Have all published federal business requirements for the service in question been met? Yes/No
Course Catalog Performance Management	Measures whether the results of agreed upon, independently collected service measures are reported to the agency for the course catalog	Yes	Are the results of agreed upon, independently collected service measures reported to the agency (e.g., internal agency reporting, service provider Service Level Agreement (SLA) results), to include at a minimum: interoperability, shareability, and reusability? Yes / No
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Course Catalog Satisfaction - Search Functionality	Measures users' satisfaction with the ability to search for training content in the course catalog.	75%	Overall, how satisfied are you with your ability to search for relevant training content in the course catalog? Employee responses to User Survey
Course Catalog Satisfaction - Content Accessibility	Measures users' satisfaction with the ability to access training content in the course catalog.	75%	Overall, how satisfied are you with your ability to access relevant training content in the course catalog? Employee responses to User Survey
Business Requirement Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Course Registration Accessibility	Determines whether the Course Registration and Delivery system is accessible and usable to all users.	Yes	Is the Course Registration and Delivery System 508 Compliant? Yes/No Is the Course Registration and Delivery System reviewed for usability with the target population? Yes/No <i>Note: Does not include training content designed for employee populations exempt from 508 compliance regulations</i>
Course Registration and Approval Functionality	Measures whether the Course Registration and Delivery capability provides the functionality needed to efficiently register and gain approval for training courses.	Yes	The Course Registration and Delivery capability provides the procedures and requirements for electronically registering for courses. Yes/No  The Course Registration and Delivery capability provides the procedures and requirements for electronically approving employee course registration. Yes/No  The Course Registration and Delivery capability provides an automated capability for submitting and approving required forms (SF 182, Continuing Service Agreements). Yes/No  The Course Registration and Delivery capability provides the procedures and requirements to interface with other HCM systems to allow tracking of employee training data. Yes/No
Course Registration and Delivery Satisfaction – Registration Functionality	Measures users' satisfaction with the ability to register for courses	75%	Overall, how satisfied are you with your ability to register for the course Employee responses to User Survey
Course Registration and Delivery Satisfaction – Delivery Functionality	Measures users' satisfaction with the delivery of the course and its associated content	75%	Overall, how satisfied are you with the delivery of the course and its associated content? Employee responses to User Survey
Business Requirement Compliance	Measures whether all published federal business requirements for the service in question have been met.	100%	Have all published federal business requirements for the service in question been met? Yes/No
Certification Applicability	Measures the proportion of mandatory certifications that have been evaluated against job requirements.	100%	Numerator: # of mandatory employee certifications that have been evaluated against relevant job requirements Denominator: Total # of mandatory employee certifications
Re-certification Compliance	Measures the proportion of employee re-certifications that have been completed within mandated timeframes	100%	Numerator: # of mandatory employee re-certifications that have been completed on time Denominator: Total # of mandatory employee re-certifications

## HR Management Services – Talent Development (Continued)

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Business Requirement Compliance	Measures whether all published federal business requirements for the service in question have been met.	100%	Have all published federal business requirements for the service in question been met? Yes/No
Talent Development Data Integrity	Measures the integrity of the data in the Talent Development System.	95%	Numerator: # of audits completed without any errors Denominator: total # of audits completed
Talent Development System Administration Satisfaction	Measures user satisfaction of Talent Development System Administration (e.g., Help Desk, usability, data accuracy).	70% positive	In the last 12 months, how satisfied are you with the administration of the Talent Development System overall (e.g., Help Desk assistance, system usability, accuracy of data in the system)? User response to Agency or Provider survey
Business Requirement Compliance	Measures whether all published federal business requirements for the service in question have been met.	100%	Have all published federal business requirements for the service in question been met? Yes/No
Talent Development Reporting Compliance	Measures the agency's compliance with reporting mandatory EHRI data elements to OPM.	Yes	Did the agency successfully report all mandatory EHRI training data elements to OPM? Yes/No
Talent Development Reporting Accuracy	Measures the accuracy of Talent Development System reports.	99.90%	Numerator: # of audits completed without any errors Denominator: # of total audits completed
Business Requirement Compliance	Measures whether all published federal business requirements for the service in question have been met.	100%	Have all published federal business requirements for the service in question been met? Yes/No



# HR Management Services – Performance Management

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
EPM System Development Compliance	Determines whether the agency has developed (i.e., written, approved, communicated to employees at all levels, and implemented) policies to define the administration of EPM programs in accordance with all relevant federal government policy requirements.	Yes	Have the agency EPM system policies been written accordance with all relevant federal government policy requirements? Yes/No Have the agency EPM system policies been signed and approved by the appropriate authorities? Yes/No Have the agency EPM system policies been communicated to employees? Yes/No Have the agency EPM system policies been reviewed, and updated if necessary, during the last fiscal year? Yes/No
Business Requirements Compliance	Measures whether the agency has met all the published federal business requirements for the service in question.	Yes	Has the agency met all published federal business requirements for the service in question? Yes/No
Performance Management Program CFR Compliance	Determines whether the Agency EPM Program includes the procedures and requirements for planning performance (as specified in §430.206), monitoring performance (as specified in §430.207), and rating performance (as specified in §430.208).	Yes	The agency has established at least one EPM program of specific procedures and requirements to be implemented in accordance with the applicable agency appraisal system. The EPM program includes the procedures and requirements for rating performance (as specified in §430.208). The EPM program includes the procedures and requirements for planning performance (as specified in §430.206). The EPM program includes the procedures and requirements for monitoring performance (as specified in §430.207).  Compliant = Yes or No (If answer to all data inputs below are "Yes", then compliant.)
Business Requirements Compliance	Measures whether the agency has met all the published federal business requirements for the service in question.	Yes	Has the agency met all published federal business requirements for the service in question? Yes/No
Performance Management Program Evaluation	Determines whether the agency or provider conducts periodic evaluations to determine the effectiveness of its Performance Management Program.	Yes	Has the agency Performance Management Program been evaluated to determine its effectiveness? Yes/No
Business Requirements Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Manager satisfaction with performance management process	Measures managers' satisfaction with the providers' performance management process	70% positive	To what extent does your provider's performance management process enable you to effectively develop your employees' capabilities? To what extent does your provider's performance management process enable you to effectively communicate your employees about their performance? To what extent does your provider's performance management process enable you to effectively monitor your employees' performance? To what extent does your provider's performance management process enable you to effectively appraise your employees' performance?  Aggregate manager responses to provider survey
Performance Management Cost per Employee Served	Measures the cost per employee serviced during the annual performance management cycle	TBD	Numerator: Cost of performance management services (EPM employees' salaries and benefits, EPM overhead/CPEM HRIT Spend, EPM Outsourcing/Contractor Costs for agency-provided services; Total EPM fees paid to a shared service provider for SSP-provided services) Denominator: # of employees receiving performance management services during the annual performance cycle
Performance Management Tool Satisfaction	Measures employees' satisfaction with the providers' performance management tool or capability	70% positive	To what extent is your provider's performance management tool or capability easy to use? To what extent does your provider's performance management tool or capability function as expected? Aggregate employee responses to provider service survey
Business Requirements Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
EPM Reporting Accuracy	Measures the accuracy of the provider's EPM reporting capabilities.	99%	Numerator: # of audits completed without any errors Denominator: total # of audits completed
EPM Data Analysis Effectiveness	Measures whether the EPM reporting capabilities drive organizational performance and program improvement.	75% positive	To what extent does the EPM reporting capability provide the agency with the ability to utilize performance data to make decisions that drive organizational performance and program improvement. Agency response to provider survey
EPM Reporting Timeliness	Measures the timeliness of EPM reports provided to customers.	99%	Numerator: # of audited reports completed on time Denominator: total # of audited reports
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Business Requirements Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
EPM Recognition Program Development Compliance	Determines whether the agency has developed (i.e., written, approved, communicated to employees at all levels, and implemented) an EPM Recognition Program in accordance with all relevant federal government policy requirements.	Yes	Has an agency EPM recognition program been developed in accordance with all relevant federal government policy requirements? Yes/No Has the agency EPM recognition program been signed and approved by the appropriate authorities? Yes/No Has an agency EPM recognition program been communicated to employees? Yes/No Has the agency EPM recognition program been reviewed, and updated if necessary, during the last fiscal year? Yes/No  Compliant = Yes or No (If answer to all data inputs below are "Yes", then compliant.)
Business Requirements Compliance	Measures whether the agency has met all the published federal business requirements for the service in question.	Yes	Has the agency met all published federal business requirements for the service in question? Yes/No
Recognitions Process Timeliness	Measures the average time (in days) from award initiation until the employee recognition has been approved	2 weeks	Numerator: Aggregate # total business days from award initiation until the employee recognition has been approved for all applicable employees Denominator: Total # of agency employees included in the recognitions process
Recognitions Process Satisfaction - Managers	Measures managers' satisfaction with the providers' recognitions process	70% positive	To what extent does your provider's recognitions management process provide you with the ability to effectively reward your employees' performance? Aggregate manager responses to provider service survey

# HR Management Services – Performance Management (Continued)

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Recognitions Program Cost per Employee Served	Measures the cost per employee serviced as part of the recognitions process	TBD	Numerator: Cost of recognitions management services (Recognition Program employees' salaries and benefits, Recognition Program overhead/G&A, Recognition Program HRIT Spend, Recognition Program Outsourcing/Contingent Costs for agency-provided services; Total Recognition program fees paid to a shared service provider for SSP-provided services) Denominator: # of employees receiving awards as part of the recognitions process
Business Requirements Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Recognition Program Evaluation	Measures whether the provider conducts periodic evaluations to determine the effectiveness of its Recognition Management Program.	Yes	Has the agency Recognition Management Program been evaluated within the last year to determine its effectiveness? Yes/No
Business Requirements Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
EPM Recognition Program Reporting Accuracy	Quantifies the accuracy of the provider's EPM Recognition Program reporting application.	95%	Numerator: # of audits completed without any errors Denominator: total # of audits completed
Business Requirements Compliance	Measures whether the service provider has met all the published federal business requirements for the service in question.	Yes	Has the service provider met all published federal business requirements for the service in question? Yes/No
Agency SES and SL/ST PA System Agency Alignment	Measures whether the SES and/or SL/ST PA System was developed in alignment with overarching agency needs and priorities.	100%	Was the SES and/or SL/ST Performance Appraisal System developed based on agency needs and priorities? Yes/No Was the SES and/or SL/ST Performance Appraisal System developed in accordance with federal regulations, stat and guidelines? Yes/No Have the required SES and/or SL/ST Performance Appraisal System approval forms been approved by OPM? Yes/No Was the SES and/or SL/ST Performance Appraisal System communicated to stakeholders? Yes/No 100*(the number of "Yes" responses DIVIDED BY the number of total data input questions selected)
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Agency SES and SL/ST PA System Design Validity	Measures whether the SES and/or SL/ST PA System was designed to demonstrate meaningful differences in relative employee performance and pay adjustments and awards.	100%	Was the SES and/or SL/ST Performance Appraisal System designed to reflect meaningful differences in senior employee performance, such that those senior employees who demonstrated the highest levels of individual performance and/or contribution to agency performance receive the highest annual summary ratings? Yes/No  Was the SES and/or SL/ST Performance Appraisal System designed to reflect meaningful distinctions in senior employee performance, as it relates to pay adjustments and awards, such that those senior employees who received the highest annual summary ratings (or ratings of record) also received the highest pay adjustments and/or performance awards (combined or separately)? Yes/No  100*(the number of "Yes" responses DIVIDED BY the number of total data input questions selected)
Business/Service Requirement Compliance	Measures whether the service provider has met all the published business and service requirements for this service.	Yes	Has the service provider met all published federal business and service requirements? Yes/No
Agency SES and/or SL/ST PA System Compliance	Measures whether the SES and/or SL/ST PA System complies with existing applicable regulations and guidelines.	Yes	Does the application or implementation of the SES and/or SL/ST Performance Appraisal System comply with existing applicable regulations, statutes, and guidelines? Yes/No
Agency SES and/or SL/ST PA System Validity	Measures whether the SES and/or SL/ST PA System demonstrates meaningful differences in relative senior employee performance and pay adjustments and awards after application or implementation.	Yes	Does the SES and/or SL/ST Performance Appraisal System actually demonstrate meaningful differences in senior employee and organizational performance? Yes/No  Does the SES and/or SL/ST Performance Appraisal System actually demonstrate meaningful distinctions in senior employee performance, as it relates to pay adjustments and awards, such that those who received the highest ratings (or ratings of record) received the highest pay adjustments and/or performance awards (combined or separately)? Yes/No  100*(the number of "Yes" responses DIVIDED BY the number of total data input questions selected)
Business/Service Requirement Compliance	Measures whether the service provider has met all the published business and service requirements for this service.	Yes	Has the service provider met all published federal business and service requirements? Yes/No
Certification 2.0 only: Self-Verification Compliance	Measures whether the service provider completed the self-verification process in compliance with applicable regulations.	Yes	Did the service provider complete the self-verification process in compliance with applicable OPM policy? Yes/No

# HR Management Services – Performance Management (Continued)

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
SES and/or SL/ST Certification Process Completion	Determines whether the service provider submitted all necessary documents and materials for the overall SES and/or SL/ST PA System Certification in compliance with existing guidance and regulations.	100%	Has the service provider submitted an SES and/or SL/ST Pay Policy? Yes/No Has the service provider written and submitted an Organizational Assessment and Guidelines Document for the recently-completed performance appraisal period? Yes/No Did the service provider submit all required documentation and materials in a timely manner, to avoid a possible lapse in certification? Yes/No Has the service provider submitted the Certification Request letter, signed by the Agency Head, Oversight Official or other designee? Yes/No Has the service provider responded to the Annual OPM Data call with the submission of Pay and Awards Data for and/or SL/ST? Yes/No Has the service provider responded to the Annual OPM Data call with the submission of Pay and Awards Data for and/or SL/ST? Yes/No  100*(the number of "Yes" responses DIVIDED BY the number of total data input questions selected)
Agency-designed PA System only: SES and SL/ST Certification Process Completion	Measures whether the service provider submitted all necessary documents and materials for an agency-designed SES and/or SL/ST PA System (PAAT) Certification in compliance with existing guidance and regulations.	Yes	Has the service provider submitted documentation communicating the relationship between performance rating and pay adjustments to senior employees, including the rating distribution, the average pay adjustment amount and the average rating-based award amounts, from the most recently-completed appraisal period? Yes/No  Has the service provider submitted documentation that the Agency conducted trainings or briefings for senior employees on its pay policy and performance appraisal system? Yes/No  Has the service provider completed and submitted the Performance Appraisal Assessment Tool (PAAT) for the SES and/or SL/ST Appraisal Systems? Yes/No  Has the service provider submitted a representative sample of SES and SL/ST Performance Plans? Yes/No  100*(the number of "Yes" responses DIVIDED BY the number of total data input questions selected)
Basic SES and SL/ST PA System only: SES and SL/ST Certification Process Completion	Measures whether the service provider submitted all necessary documents and materials for Basic SES and SL/ST PA System (Cert 2.0) Certification in compliance with existing guidance and regulations.	Yes	Has the service provider submitted the Oversight Verification letter, signed by the Agency Head, Oversight Official or other designee? Yes/No Has the service provider submitted Ratings Distribution Justification templates, as required? Yes/No  100*(the number of "Yes" responses DIVIDED BY the number of total data input questions selected)
SES and/or SL/ST Certification Process Completion	Determines whether the service provider submitted all necessary documents and materials for the overall SES and/or SL/ST PA System Certification in compliance with existing guidance and regulations.	100%	Has the service provider submitted an SES and/or SL/ST Pay Policy? Yes/No Has the service provider written and submitted an Organizational Assessment and Guidelines Document for the recently-completed performance appraisal period? Yes/No Did the service provider submit all required documentation and materials in a timely manner, to avoid a possible lapse in certification? Yes/No Has the service provider submitted the Certification Request letter, signed by the Agency Head, Oversight Official or other designee? Yes/No Has the service provider responded to the Annual OPM Data call with the submission of Pay and Awards Data for and/or SL/ST? Yes/No Has the service provider responded to the Annual OPM Data call with the submission of Pay and Awards Data for and/or SL/ST? Yes/No  100*(the number of "Yes" responses DIVIDED BY the number of total data input questions selected)
Agency-designed PA System only: SES and SL/ST Certification Process Completion	Measures whether the service provider submitted all necessary documents and materials for an agency-designed SES and/or SL/ST PA System (PAAT) Certification in compliance with existing guidance and regulations.	Yes	Has the service provider submitted documentation communicating the relationship between performance rating and pay adjustments to senior employees, including the rating distribution, the average pay adjustment amount and the average rating-based award amounts, from the most recently-completed appraisal period? Yes/No  Has the service provider submitted documentation that the Agency conducted trainings or briefings for senior employees on its pay policy and performance appraisal system? Yes/No  Has the service provider completed and submitted the Performance Appraisal Assessment Tool (PAAT) for the SES and/or SL/ST Appraisal Systems? Yes/No  Has the service provider submitted a representative sample of SES and SL/ST Performance Plans? Yes/No  100*(the number of "Yes" responses DIVIDED BY the number of total data input questions selected)

# HR Management Services – Performance Management (Continued)

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Basic SES and SL/ST PA System only; SES and SL/ST Certification Process Completion	Measures whether the service provider submitted all necessary documents and materials for Basic SES and SL/ST PA System (Cert 2.0) Certification in compliance with existing guidance and regulations.	Yes	Has the service provider submitted the Oversight Verification letter, signed by the Agency Head, Oversight Officer or other designee? Yes/No Has the service provider submitted Ratings Distribution Justification templates, as required? Yes/No 100% (the number of "Yes" responses DIVIDED BY the number of total data input questions selected)
SES and SL/ST Certification Results	Measures whether the SES and SL/ST PA system received a Provisional or Full Certification status from OPM.	No	Has the SES and/or SL/ST Performance Appraisal System received Provisional Certification or Full Certification status from OPM? Yes/No
Business/Service Requirement Compliance	Measures whether the service provider has met all the published business and service requirements for this service.	Yes	Has the service provider met all published federal business and service requirements? Yes/No

# HR Management Services – Separation and Retirement

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Agency Separation Strategy Adoption	Determines whether the agency has adopted (i.e., written, approved, communicated to employees, and implemented) a separation strategy that includes overarching goals and priorities.	Yes	Was the separation strategy developed based on agency hiring needs and priorities? Yes/No Have the separation goals and priorities been written in accordance with federal regulations and guidelines? Yes/No Have the separation goals and priorities been approved by the appropriate authority? Yes/No Have the separation goals and priorities been communicated to appropriate stakeholders? Yes/No Has the separation program been evaluated for progress against objectives, goals, and priorities? Yes/No
Separation Objective Completion Rate	Measures the rate at which the separation strategy objectives are met.	70%	Numerator: Total number of objectives in the separation strategy that were completed in the last fiscal year Denominator: Total number of objectives in the separation strategy that were initially scheduled to be completed in the last fiscal year
Compliance with Separation Policy and Regulations	Measures compliance with federal separation regulations.	Yes	Has the agency demonstrated compliance in scheduled reports and/or reviews on separation procedures (e.g., audit, agency self-audit)? Yes/No
Separation Documentation Quality Control Review	Measures the accuracy of separations processing for agency employees.	99.90%	Numerator: Total number of audited separations packets without errors in the last fiscal year Denominator: Total number of separations packets audited in the last fiscal year <i>A separation packet is defined as the electronic record that documents the final information sent to the payroll provider for processing. This packet includes &lt;insert components of separation packet&gt; (Note: HRLOB is currently working to determine relevant data elements for the separation file that should be part of the audit.)</i>  <i>An error is defined as an inaccuracy in coding or data entry that leads to incorrect payroll leave payout or incorrect coverage for the employee.</i> <i>Note: audits should include a representative sample of separations packets.</i>
Separation Advisory Service Satisfaction HR Practitioner	Measures HR practitioner satisfaction with separation advisory services.  <i>HR practitioners include 201, 203, and other occupational series that provide HCBRM services to agency employees.</i>	75% positive*  *Includes all responses over the scale midpoint	In the last 12 months, have you sought separations advice and / or guidance from your agency or provider? Yes/No In the last 12 months, how satisfied are you with the guidance and / or advice that you received regarding separations law and regulations? Yes/No  HR Practitioner responses to separation and retirement survey (e.g., existing agency surveys, OPM surveys) <i>HR practitioners include 201, 203, and other occupational series that provide HCBRM services to agency employees</i>
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Satisfaction with Separation Communications	Measures employee satisfaction with agency separation communications.	75% positive*  *Includes all responses over the scale midpoint	In the last 12 months, how satisfied were you with the guidance and / or advice that was provided to you regarding separation policies and procedures? To what extent did the guidance and/or advice that was provided to you regarding separations policies and procedures meet your needs?  Employee responses to exit interview (e.g., agency mandated exit interview)
Separations Processing Timeliness	Measures the proportion of employee separations processed within one pay period of the effective date.	99.90%	Date that the separation packet was transmitted or mailed to the payroll provider, for each employee separation in the last fiscal year*  Step 1. (Date of the last day in the next pay period following the separation effective date minus the date that the separation packet was transmitted or mailed to the payroll provider) for each employee separation in the last fiscal year*  Step 2. Count the number of employee separations for which step 1 resulted in a positive number  Step 3. 100*(Number of employee separations for which step 1 resulted in a positive number DIVIDED BY Total number of employee separations in the last fiscal year)  *Excludes death actions
Business Requirement Compliance	Measures whether the agency or service provider has met all the published business requirements for this service.	Yes	Has the service in question met all published federal business requirements? Yes/No
Agency Retirement Strategy Adoption	Determines whether the agency has adopted (i.e., written, approved, communicated to employees, and implemented) a retirement strategy that includes overarching goals and priorities.	Yes	Was the retirement strategy developed based on agency hiring needs and priorities? Yes/No Have the retirement goals and priorities been written in accordance with federal regulations and guidelines? Yes/No Have the retirement goals and priorities been approved by the appropriate authority? Yes/No Have the retirement goals and priorities been communicated to appropriate stakeholders? Yes/No Has the retirement program been evaluated for progress against objectives, goals, and priorities? Yes/No
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Retirement Objective Completion Rate	Measures the rate at which the retirement strategy objectives are met.	70%	Numerator: Total number of objectives in the retirement strategy that were completed in the last fiscal year Denominator: Total number of objectives in the retirement strategy that were initially scheduled to be completed in the last fiscal year
Compliance with Retirement Policy and Regulations	Measures compliance with federal retirement regulations.	Yes	Has the agency demonstrated compliance in scheduled reports and/or reviews on retirement procedures (e.g., audit, agency self-audit)? Yes/No
Satisfaction with Retirement Communications	Measures employee satisfaction with agency retirement communications.	75% positive*  *Includes all responses over the scale midpoint	In the last 12 months, how satisfied were you with the information that was provided to you regarding retirement policies and programs? To what extent did the information that was provided to you regarding retirement policies and programs meet your needs?  Employee responses to separation and retirement survey (e.g., existing agency surveys, OPM surveys)
Business Requirement Compliance	Measures whether the service provider has met all the published business requirements for this service.	Yes	Has the service in question met all published federal business requirements? Yes/No

# HR Management Services – Separation and Retirement (Continued)

Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Clarity of Retirement Policy Communications	Measures the clarity of agency communications regarding retirement programs.	75% positive* *Includes all responses over the scale midpoint	To what extent are the communications that you've received from your agency's and / or OPM retirement fund clear and concise? HR staff responses to separation and retirement survey (e.g., existing agency surveys, OPM surveys)
Retirement Advisory Service Satisfaction: Manager	Measures manager satisfaction with retirement advisory services.	75% positive* *Includes all responses over the scale midpoint	In the last 12 months, have you sought retirement advice and / or guidance from your agency or provider? Yes/No In the last 12 months, how satisfied are you with the guidance and / or advice that you received regarding retirement law and regulations? Yes/No Manager responses to separation and retirement survey (e.g., existing agency surveys, OPM surveys)
Retirement Advisory Service Satisfaction: Employee	Measures employee satisfaction with retirement guidance and education services.	75% positive* *Includes all responses over the scale midpoint	In the last 12 months, have you sought retirement guidance and / or education from your agency or provider? Yes/No In the last 12 months, how satisfied are you with the guidance and / or education that you received regarding retirement benefits, procedures, tools, and/or policies/regulations? Yes/No Employee responses to separation and retirement survey (e.g., existing agency surveys, OPM surveys)
Business Requirement Compliance	Measures whether the service provider has met all the published business requirements for this service.	100%	Has the service in question met all published federal business requirements? Yes/No
Retirement Processing Timeliness	Measures the proportion of retirements processed within one pay period of the effective date.	99.9%	Step 1. (Date of the last day in the next pay period following the retirement effective date minus the date that the retirement package was transmitted or mailed to the payroll provider) for each retirement in the last fiscal year Step 2. Count the number of retirements for which step 1 resulted in a positive number Step 3. 100*(Number of retirements for which step 1 resulted in a positive number / Total number of retirements in the last fiscal year) <i>Date of the last day in the next pay period following the retirement effective date, for each retirement in the last fiscal year (e.g., if the effective date is 5 prior to the end of a 2 week pay period, the date selected will be the 19 days after the effective date)</i> * Excludes disability retirements
Service Measure Name	Service Measure Description	Service Measure Target	Service Measurement Formula
Retirement Documentation Quality Control Review	Measures the accuracy of retirement processing for agency employees.	99.9%	Numerator: Total number of audited retirement packages without errors in the last fiscal year Denominator: Total number of retirement packages audited in the last fiscal year <i>A retirement package is defined as the electronic record that documents the final information sent to the payroll provider for processing and transmittal to OPM. This package includes &lt;&lt;insert components of retirement package (Note: HRLOB is currently working to determine relevant data elements for the separation file that should be part of audit.)</i> <i>An error is defined as an inaccuracy in coding or data entry that leads to incorrect payroll leave payout or incorrect coverage for the employee.</i> <i>Note: audits should include a representative sample of retirement packages.</i>
Retirement Tools Satisfaction: HR Practitioner	Measures HR practitioner satisfaction with retirement tools, including manuals, process guides, and instructions.	75% positive* *Includes all responses over the scale midpoint	In the last 12 months, how satisfied were you with the tools, including manuals, process guides, instructions, and training that you use to process retirements for agency employees? HR Practitioner responses to separation and retirement survey (e.g., existing agency surveys, OPM surveys)
Business Requirement Compliance	Measures whether the service provider has met all the published business requirements for this service.	100%	Has the service in question met all published federal business requirements? Yes/No



## Real Property

RPM Service Measure Name	RPM Service Measure Description	Service Measure Target	Service Measurement Formula
Real Property Asset and/or	Number of real property and/or component requests		
Real Property Asset and/or	Percent of real property and/or component requests		
Real Property Asset	Number of real property assets acceptance and		
Real Property Asset	Percentage (%) of real property assets acceptance and		
Real Property Asset	Number of real property assets acceptance and		
Real Property Asset	Percentage (%) of real property assets acceptance and		
Real Property Inventory	Number of real property inventory assets inspected by Real		
Real Property Inventory	Percentage (%) of real property inventory assets inspected		
Real Property Inventory	The number of real property inventory assets inspected and		
Real Property Inventory	Percentage (%) of real property inventory assets inspected		
Real Property Inventory	The average Condition Index across all owned assets in a		
Real Property Inventory	The number of days since Condition Index was last updated		
Real Property Inventory	The number of real property inventory assets inspected and		
Real Property Inventory	Percentage (%) of real property inventory assets inspected		
Real Property Inventory	Number of real property inventory assets inspected with		
Real Property Inventory	Percentage (%) of real property inventory assets inspected		
Real Property Inventory	Number of real property inventory assets inspected and		
Real Property Inventory	Percentage (%) of real property inventory assets inspected		
Real Property Inventory	Number of real property inventory information audits		
Real Property Inventory	Number of real property inventory information (records)		
Real Property Inventory	Percentage (%) of real property inventory information	=>98%	
Real Property Inventory	Number of real property inventory information (records)		
Real Property Inventory	Percentage (%) of real property inventory information		
Real Property Inventory	Number of real property inventory information (records)		
Real Property Inventory	Percentage (%) of real property inventory information		
Real Property Inventory	Number of real property assets and/or components within		Count of components within a
Real Property Inventory	Percentage (%) of real property assets and/or components		Count of IT technology
Real Property Inventory	The cost to replace an existing real property asset by Real		
Real Property Asset Use by	Number of real property asset use by non-Federal entities		
Real Property Asset Use by	Percentage (%) of real property asset use by non-Federal		
RPM Service Measure Name	RPM Service Measure Description	Service Measure Target	Service Measurement Formula
Real Property Asset	Number of real property asset operations and maintenance		
Real Property Asset	Average number of days to complete real property asset		
Real Property Asset	Percentage (%) of real property asset operations and		
Real Property Asset	Number of real property asset operations and maintenance		
Real Property Asset	Percentage (%) of real property asset operations and		
Real Property Asset	Number of real property asset operations and maintenance		
Real Property Asset	Average number of days to complete real property asset		
Real Property Owned Assets	Real property owned asset budgeted operations and		
Real Property Owned Assets	Percentage (%) of real property owned asset budgeted		
Real Property Leased Assets	Real property leased asset budgeted operations and		
Real Property Leased Assets	Percentage (%) of real property leased asset budgeted		
Real Property Owned Assets	Real property owned asset actual operations and		
Real Property Owned Assets	Percentage (%) of real property owned asset actual		
Real Property Leased Assets	Real property leased asset actual operations and		
Real Property Leased Assets	Percentage (%) of real property leased asset actual		
Real Property Owned Assets	Amount in dollars (\$) of real property owned asset		
Real Property Leased Assets	Amount in dollars (\$) of real property leased asset budgeted		
Real Property Assets Repair	Amount in dollars (\$) of real property asset repair needs by		
Real Property Assets Annual	Amount of dollars (\$) spent for annual operating costs of a		the total costs, either operating
Real Property Assets	Amount of dollars (\$) spent for annual maintenance of a		
Real Property Assets	Percentage (%) ratio of dollars spent for annual operating		the total costs, either operating
Real Property Assets	Percentage (%) ratio of dollars spent for annual		
Real Property Assets	Percentage (%) of dollars annual operating budget	Determined based on	
Real Property Assets	Percentage (%) of dollars annual maintenance budget		
Real Property Assets	Number of real property asset advanced meters by Real		



## Real Property (Continued)

RPM Service Measure Name	RPM Service Measure Description	Service Measure Target	Service Measurement Formula
Real Property Assets	Number of real property asset advanced meters that are		
Real Property Assets	Percentage (%) of real property asset advanced meters that		
Real Property Assets Prior	Number of prior period recorded units (BTU) of energy		
Real Property Assets Current	Number of current period recorded units (BTU) of energy		
Real Property Assets Change	Change in energy usage in BTU per asset capacity (square		Number of current period
Real Property Asset Capacity	Number of real property asset capacity (Real Property Size		
Real Property Asset	Number of real property asset utilized capacity (Real		
Real Property Asset	Percentage (%) of real property asset utilized capacity by		
Real Property Asset	Number of real property assets underutilized (Real Property		
Real Property Asset	Percentage (%) of real property assets underutilized by Real		
Real Property Assets	Number of real property assets consolidated and collocated		
Real Property Asset	Percentage (%) of real property assets consolidated and		
Real Property Federal-	Number of real property Federal-owned assets (Real		
Real Property Federal-	Number of real property Federal-owned asset capacity (Real		
Real Property Federal-	Number of real property Federal-owned asset utilized		
Real Property National Lease	Number of national leases replaced to support achievement	>=80% by end of	
Real Property National Lease	Percentage (%) of national leases replaced to support	>=80% by end of	
Real Property Leases Below	Number of national leases negotiated to support		
Real Property Leases Below	Percentage (%) of national leases negotiated to support		
Real Property Lease Cost	Compliance of the Net Present Value (NPV) of GSA lease		
Real Property Lease	Number of real property leases in holdover status and		
Real Property Lease	Percentage (%) of real property leases in holdover status		
Real Property Rentable	Number of national leases negotiated to support		
Real Property Rentable	Percentage (%) of national leases negotiated to support		
Real Property Moves to	Number of national leases negotiated to support		
Real Property Moves to	Percentage (%) of national leases negotiated to support		
Real Property Assets Total	Number of dollars (\$) spent for total lease costs of a real		the total costs, either operating
Real Property Assets Total	Number of capacity of total square feet of a real property		the total costs, either operating
Real Property Assets	Number of capacity of assigned people of a real property		the total costs, either operating
Real Property Assets Costs	Ratio percentage (%) of dollars spent for lease cost of a real		the total costs, either operating
Real Property Assets Costs	Ratio percentage (%) ratio of dollars spent for lease cost of a		
Real Property Assets Tenant	Number of real property assets Tenant Satisfaction survey		
Real Property Assets Tenant	Number of real property assets Tenant Satisfaction survey		
Real Property Assets Tenant	Percentage (%) of real property assets Tenant Satisfaction		
RPM Service Measure Name	RPM Service Measure Description	Service Measure Target	Service Measurement Formula
Real Property Assets	Number of real property assets based on their importance		
Real Property Asset	Number of real property asset unneeded by Real Property		
Real Property Asset Percent	Percentage (%) of real property asset unneeded by Real		
Real Property Asset Space	Number of real property asset space requests by Real		
Real Property Asset Space	Number of real property asset space requests that align		
Real Property Asset Space	Percentage (%) of real property asset space requests that		
Real Property Security,	Number of real property security, safety, and environmental		
Real Property Security,	Number of real property security, safety, and environmental		
Real Property Security,	Percent (%) of real property security, safety, and		
Real Property Security,	Number of real property security, safety, environmental,		
Real Property Security,	Number of real property security, safety, environmental,		
Real Property Security,	Percent (%) of real property security, safety, environmental,		
Real Property Parking Space	Percentage (%) of real property parking spaces utilized by		
Real Property Parking Space	Number of real property unneeded parking spaces by Real		
Real Property Parking Space	Percentage (%) of real property unneeded parking spaces by		
Real Property Storage Spaces	Number of real property storage space (cubic feet) utilized		
Real Property Storage Space	Percentage (%) of real property storage space (cubic feet)		
Real Property Storage Space	Number of real property storage space (cubic feet)		
Real Property Storage Space	Percentage (%) of real property storage space (cubic feet)		
Real Property Storage Space	Number of real property storage space (cubic feet)		

## Real Property (Continued)

RPM Service Measure Name	RPM Service Measure Description	Service Measure Target	Service Measurement Formula
Real Property Storage Space	Percentage (%) of real property storage space (cubic feet)		
Real Property Storage Space	Number of real property storage space (cubic feet)		
Real Property Storage Space	Percentage (%) of real property storage space (cubic feet)		
Real Property Rooms Used	Number of real property rooms by Real Property Type Code,		
Real Property Rooms Used	Percentage (%) of real property rooms space utilized by Real		
Real Property Facility Move-	Number of real property facility move-in, packing, and		
Real Property Facility Move-	Number of real property facility move-in, packing, and		
Real Property Facility Move-	Number of real property facility move-in, packing, and		
Real Property Facility Move-	Number of real property facility move-in, packing, and		
Real Property Facility Other	Number of tenants occupying the real property asset daily		
Real Property Facility Other	Percentage (%) of tenants occupying the real property asset		
Real Property Facility Other	Number of real property assets that are potential		
Real Property Facility Other	Percentage (%) of real property assets that are potential		
Real Property Facility Other	Number of Real Property Facility Other Tenant Services		
Real Property Facility Other	Number of Real Property Facility Other Tenant Services		
Real Property Facility Other	Number of Real Property Facility Other Tenant Services		
Real Property Agency Asset	Number of real property agency assets that can be modified		
Real Property Agency Asset	Percentage (%) of real property agency assets that can be		
Real Property Unneeded	Number of real property agency assets that can be reused		
Real Property Unneeded	Percentage (%) of real property agency assets that can be		
Real Property Unneeded	Number of real property unneeded agency asset space by		
Real Property Unneeded	Percentage (%) of real property unneeded agency asset		
Real Property Asset Budget	Budget estimate for real property assets identified for reuse		
Real Property Assets	Number of real property assets identified for reuse by Real		
Real Property Assets	Percentage (%) of real property assets identified for reuse		
Real Property Assets to	Number of real property assets identified for transfer or		
Real Property Assets Percent	Percentage (%) of real property assets identified for transfer		
Real Property Assets	Number of real property assets identified as repairable or in		
Real Property Assets	Percentage (%) of real property assets identified as		
Real Property Assets	Number of real property assets disposed by Real Property		
Real Property Asset Disposal	Average number of days for disposal of real property by		
Real Property Assets	Percentage (%) of real property assets disposed by Real		
Real Property Assets	Number of real property assets disposed by Disposal Type		
RPM Service Measure Name	RPM Service Measure Description	Service Measure Target	Service Measurement Formula
Real Property Asset Disposal by Disposal Type Timeliness	Average number of days for disposal of real property by Disposal Type (public sale, non-competitive sales, and donations)		
Real Property Assets	Percentage (%) of real property assets disposed by Disposal		
Real Property Asset Gross	Total gross proceeds of real property disposals brought to		
Real Property Asset Gross	Average number of days to receive proceeds of real		
Real Property Asset Gross	Total gross proceeds of real property disposals brought to		
Real Property Asset Gross	Average number of days to receive proceeds of real		
Real Property Asset Disposal	Total gross disposal costs of real property disposals brought		
Real Property Asset Disposal	Total gross disposal costs of real property disposals brought		
Real Property Assets	Number square foot capacity of real property assets		
Real Property Assets	Amount of total investment cost in dollars (\$) of real		
Real Property Assets	Amount of total cost reduction in dollars (\$) of real property		
Real Property Assets	Amount of total investment cost in dollars (\$) of real		
Real Property Assets	Amount of total cost reduction in dollars (\$) of real property		
Real Property Square	Number (square feet) assessment of whether agency real		
Real Property Square	Percentage (%) assessment of whether agency real property		
Real Property Square	Number (square feet) assessment of agency real property		
Real Property Square	Percentage (%) assessment of agency real property office		

## Travel and Expense Management

Measure Name	Measure Description	Measur	Measurement Formula
Provider-Identified	Number of service	TBD	Count of SCRs initiated by the Provider by type (e.g.
Service Performance	% of Service Performance	98%	Number of service performance targets met / Total
Service Review Meeting	% of monthly planned	100%	Number of monthly planned service level review
Service Performance	Number of service	TBD	Count of service performance target adjustments
Service Performance	% of service performance	TBD	Number of service performance target adjustments
Service Performance	% of service performance	TBD	Number of service performance target adjustments
Service Performance	% of service performance	98%	Number of service performance issues resolved /
Service Performance	% of service performance	98%	Number of service performance issues resolved by
TMC Contact Volume	Number of TMC service	TBD	Count of TMC service contacts received by contact
TMC Call Answer	% of calls answered within	70%	Number of calls answered within 30 seconds by a live
TMC Call Hold -	Average hold time for TMC	<60 sec	Amount of hold time (seconds) for TMC calls not
TMC Call	% of TMC calls abandoned	<=3%	Number of TMC calls abandoned by the caller
TMC Service Email	Number of TMC Email	TBD	Count of TMC Email responses provided
TMC Service Email	% of emails answered	100%	Number of TMC Service Desk Emails responded to by
VIP TMC Service Call	Number of VIP TMC service	80%	Count of VIP service calls received
VIP TMC Call Answer	% of VIP TMC calls	80%	Number of VIP calls answered within 20 seconds by a
VIP TMC Voice Message	% of VIP TMC voice	100%	Number of VIP voice messages received during core
VIP TMC Call Hold	Average hold time for VIP	Less than 60	Amount of hold time (seconds) for VIP calls not
VIP TMC Call	% of VIP TMC calls	<=3%	Number of VIP calls abandoned by the caller (where
Average Speed for VIP	Average length of time it	Less than 60	Amount of hold time (seconds) for VIP TMC calls not
Self-Service	Number of Self-Service	TBD	Count of Self-Service reservations booked by type
Self-Service	% of Self-Service	TBD	Number of Self-Service reservations booked for each
Agent-Assisted	Number of Agent-Assisted	TBD	Count of Agent-Assisted reservations booked by type
Agent-Assisted	% of Agent-Assisted	TBD	Number of Agent-Assisted reservations booked for
Self-Service	Number of reservations	TBD	Count of reservations begun as self-service and
Self-Service	Number of self-service	TBD	Count of reservations initiated by result (e.g.,
Self-Service	% of reservations initiated	TBD	Number of reservations initiated by result type /
Self-Service	Number of Self-Service	TBD	Count of reservations initiated that failed by failure
Self-Service	% of self-service	TBD	Number of reservations initiated that failed by
Self-Service	Average length of time it	≤13 minutes	Total amount of time to book self-service
Agent-Assisted	Average length of time it	≤ 12	Total amount of time to book agent-assisted
Self-Service	% of self-service	75%	Number of self-service reservations booked within
Booked City-Pair	Number of CPP fares	TBD	Count of CPP fares booked by air carrier reservation
Booked City-Pair	% of CPP fares booked by	TBD	Number of CPP fares booked by air carrier
FedRooms Hotel	% of lodging reservations	TBD	Number of lodging reservations booked in-channel
FedRooms Rate Code	% of total lodging	TBD	Number of lodging reservations booked in-channel
Travel Authorizations	Number of travel	TBD	Count of travel authorizations by entry source (e.g.,
Measure Name	Measure Description	Measur	Measurement Formula
Travel Authorizations	Number of travel	TBD	Count of travel authorizations created and submitted
Travel Authorizations	% of travel authorizations	98%	Number of travel authorizations processed by
Travel Authorizations	Number of travel	TBD	Count of travel authorizations initiated by result
Travel Authorizations	% of travel authorizations	TBD	Number of travel authorizations initiated by result /
Travel Authorization	Number of travel	TBD	Count of travel authorizations failed by failure type
Travel Authorization	% of travel authorizations	TBD	Number of travel authorizations failed by failure type
Travel Authorization	Average length of time it	≤ 16	Total amount of time in minutes to complete travel

## Travel and Expense Management (Continued)

Measure Name	Measure Description	Measur	Measurement Formula
Travel Authorization	% of travel authorizations	75%	Number of travel authorization completed within 16
Travel Authorizations	% of travel authorizations	TBD	Number of travel authorizations approved / Total
Travel Authorization	Average length of time it	≤ 11	Total amount of time to approve travel
Travel Authorization	% of travel authorizations	75%	Number of travel authorization approved by each
Travel Authorization	% of travel authorizations	90%	Number of travel authorizations approved within 3
Tickets Issued Volume	Number of tickets issued	TBD	Count of tickets issued by type (e.g., domestic air,
Air Carrier Non-	Number of air carrier non-	TBD	Count of air carrier non-refundable tickets issued by
Air Carrier Non-	% of air carrier non-	TBD	Number of air carrier non-refundable tickets issued
Cancelled Air Carrier	Number of air carrier	TBD	Count of air carrier refundable tickets cancelled after
Cancelled Air Carrier	% of air carrier refundable	TBD	Number of air carrier refundable tickets cancelled
Refunds Received for	% of refunds received for	TBD	Number of refunds received for air carrier
Cancelled Air Carrier	Number of air carrier non-	TBD	Count of air carrier non-refundable tickets cancelled
Cancelled Air Carrier	% of air carrier non-	TBD	Number of air carrier non-refundable tickets
Cancelled Air Carrier	Total amount (value) of air	TBD	Total dollar amount of air carrier refundable tickets
Unused Ticket Value by	Number of unused valid	TBD	Count of unused valid tickets with residual value
Unused Ticket by	% of unused valid tickets	TBD	Number of unused valid tickets with residual value
Vouchers Initiated By	Number of vouchers	TBD	Count of vouchers initiated by type (e.g., temporary
Vouchers Initiated By	% of vouchers initiated by	TBD	Number of vouchers initiated by type / Total number
Voucher Initiated By	Number of vouchers	TBD	Count of vouchers initiated by entry source (e.g.,
Vouchers Processed by	Number of vouchers	TBD	Count of vouchers created and submitted by
Vouchers Processed by	% of vouchers created and	98%	Number of vouchers created and submitted by
Vouchers Initiated By	Number of vouchers	TBD	Count of vouchers initiated by result (e.g.,
Vouchers Initiated By	% of vouchers initiated by	TBD	Number of vouchers initiated by result / Total
Vouchers Failure By	Number of vouchers failed	TBD	Count of vouchers failed by failure type
Voucher Failure By	% of vouchers failed by	TBD	Number of vouchers failed by failure type / Total
Voucher Completion -	Average length of time it	≤ 16	Total amount of time in minutes to complete
Measure Name	Measure Description	Measur	Measurement Formula
Voucher Completion Time	% of vouchers completed within 16 minutes	75%	Number of travel authorization completed within 16 minutes / Total number of travel authorizations completed  Note: Length of time is the amount of time the traveler/arranger spends completing the voucher from initiation to submission minus significant idle time and process interruptions where user saves voucher and completes at later time.
Temporary Duty (TDY)	% of TDY vouchers	100%	Number of TDY vouchers submitted within 5
Long-Term Temporary	% of long-term TDY	100%	Number of long-term TDY vouchers submitted every
Vouchers Approved by	Number of vouchers	TBD	Count of vouchers approved by type
Vouchers Approved by	% of vouchers approved by	TBD	Number of vouchers approved by type / Total



## Travel and Expense Management (Continued)

Measure Name	Measure Description	Measur	Measurement Formula
Unapproved	% of TDY unapproved	100%	Number of unapproved TDY vouchers returned to
Voucher Approval -	Average length of time it	≤ 11	Total amount of time to approve travel
Voucher Approval	% of voucher approvals by	75%	Number of voucher approvals by each approver by
Voucher Approval	% of TDY vouchers	90%	Number of TDY vouchers approved within 3
Travel Payment	Number of travel	TBD	Count of travel payments confirmed
Travel Payment	% of travel payments	100%	Number of travel payments confirmed within 30
Voucher Paid Volume	Number of vouchers paid	TBD	Count of vouchers paid
Centrally Billed Account	% of CBA statements	90%	Number of CBA statements reconciled with vouchers
Travel Regulatory	Number of travel	TBD	Count of travel regulatory reports submitted by type
Travel Regulatory	% of travel regulatory	100%	Number of travel regulatory reports submitted by
Travel Management	Number of travel	TBD	Count of travel management reports provided
Travel Management	% of travel management	90%	Number of travel management reports provided
Voucher Post-Payment	Number of voucher post-	TBD	Count of voucher post-payment audits
Voucher Post-Payment	% of voucher post-	98%	Number of voucher post-payment audits conducted
Voucher Post-Payment	% of voucher post-	100%	Number of travel voucher post-payment audits
Voucher Post-Payment Audit Findings by Type Volume	Number of voucher post- payment audit findings by type (e.g., compliance [validate internal controls; verify approver decisions], fraud and abuse, program effectiveness and efficiency [best use of funds], process improvement and training [reduction in costs/expense])	TBD	Count of travel voucher post-payment audit findings by type
Travel Voucher Post-	% of travel voucher post-	TBD	Number of travel voucher post-payment audit

