



U.S. Office of Personnel Management

# Congressional Budget Justification and Annual Performance Plan | FY 2025

This report is prepared in accordance with the requirements of Office of Management and Budget (OMB) Circular A-11, *Preparation, Submission, and Execution of the Budget*; and OMB Circular A-136, *Financial Reporting Requirements*.



MARCH 2024

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# Executive Summary

## FY 2025 Budget Overview

OPM’s mission is to serve as the champion of talent for the Federal Government. To accomplish this, OPM is evolving and responding to urgent workforce policy and operational needs across Government by taking a customer-focused, proactive approach to human capital management. Our products and tools enable agency leaders across Government to make decisions that support hiring and retaining a well-qualified workforce. OPM is also continuing to modernize and digitize services to Federal employees, annuitants, and their eligible family members, while improving the benefits that will position the Federal Government as a model employer including the launch of a new health benefits program for postal employees, annuitants, and their families. Additionally, OPM is identifying and prioritizing AI use-cases that can improve government-wide human resource (HR) processes and internal agency operations. This budget request will allow OPM to continue to improve customer experience and become a digital-first, data-driven agency that can lead the workforce into the future.

OPM embarked on a multi-year transformation journey that initially focused on stabilizing the agency while delivering on Biden-Harris Administration priorities and driving modernization. In FY 2025, OPM’s emphasis will be on delivering the ambitious set of objectives in our Strategic Plan – including customer experience, data leadership, and modernization – and supporting the policy objectives needed to build a strong Federal workforce. OPM’s budget request of **\$465,800,000** (excluding the Office of the Inspector General’s request) in discretionary resources for FY 2025 reflects OPM’s commitment to serving the Federal workforce and the American public.

Due to the timing of FY 2025 budget formulation and Congressional action on full-year FY 2024 appropriations, this budget builds on resources appropriated under the Continuing Appropriations Act of 2024 for OPM. The Continuing Resolution (CR) most notably provides partial funding to support the Agency’s efforts in implementing the Postal Service Health Benefits (PSHB) Program, mandated by Congress under the Postal Service Reform Act of 2022, beginning on January 1, 2025. In addition, the FY 2024 CR continues the resource investments appropriated in FY 2023, providing partial funding to continue executing Administration priorities, including those identified in Priority 1 of the President’s Management Agenda focused on “strengthening and empowering the Federal workforce.”

For FY 2025, this budget will allow OPM to maintain its progress in processing new retirement applications, support advancements in Federal hiring, and strengthen agency operations. In addition, this budget will incrementally fund investments in OPM’s IT modernization, allowing for the continued development of critical cybersecurity capabilities. Notably, it will finance cybersecurity and network operations infrastructure once the Defense Counterintelligence and Security Agency (DCSA) migrates to their own platform. These resources will help strengthen OPM’s cybersecurity posture to reduce the agency’s cybersecurity risks, as threats continually evolve and become more sophisticated. Further, the funding will build better safeguards around the sensitive data the agency maintains, protecting the information of our customers.

This budget supports implementing OPM’s transformational roadmap – the agency’s FY 2022-2026 Strategic Plan – by building on previous appropriations that reassert OPM’s workforce policymaking leadership responsibility; strengthening OPM’s leadership in Diversity, Equity, Inclusion, and Accessibility (DEIA); continuing incremental investments in OPM’s cybersecurity; implementing OPM’s data strategy and related products and services; and improving OPM’s customer experience. The alignment of this budget to the FY 2022-2026 Strategic Plan is reflected in the Performance Budget by Strategic Goal section of this document.

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#### OPM Budget FY 2023 through FY 2025 – Discretionary Resources

OPM Budget Authority	FY 2023 Enacted	FY 2024	
		Annualized CR	FY 2025 CBJ
<b>Salaries and Expenses Total</b>	<b>\$190,784,000</b>	<b>\$219,076,000</b>	<b>\$205,237,000</b>
Salaries & Expenses	\$171,411,000	\$199,703,000	\$194,527,000
IT Modernization S&E	\$19,373,000	\$19,373,000	\$10,710,000
Postal Reform S&E - No Year	\$0	\$0	\$0
<b>Trust Fund Total</b>	<b>\$194,924,000</b>	<b>\$194,924,000</b>	<b>\$260,563,000</b>
Trust Fund Annual	\$194,924,000	\$194,924,000	\$260,563,000
<b>Discretionary Appropriation</b>	<b>\$385,708,000</b>	<b>\$414,000,000</b>	<b>\$465,800,000</b>
Salaries & Expenses - OIG	\$6,908,000	\$6,908,000	\$7,144,000
Trust Fund Annual - OIG	\$29,487,000	\$29,487,000	\$35,556,000
<b>OIG Discretionary Appropriation *</b>	<b>\$36,395,000</b>	<b>\$36,395,000</b>	<b>\$42,700,000</b>
<b>OPM Total</b>	<b>\$422,103,000</b>	<b>\$450,395,000</b>	<b>\$508,500,000</b>

## OPM Strategic Priorities

In FY 2025, OPM will continue to execute against its Strategic Plan to rebuild its capability and capacity, modernize the agency, and drive progress toward key Biden-Harris Administration priorities -- including improving customer experience, making sure every Federal job is a good job, improving policies to treat all Federal employees with dignity and respect, and supporting agencies in finding, developing, and retaining the talent they need to achieve their missions. This budget invests in OPM's strategic priorities in the following ways:

### Goal 1: Position the Federal Government as a model employer

As the nation's largest employer, the Federal Government should be a model employer that sets an example for other private and public sector organizations in the United States and around the world. OPM will do this by fostering diverse, equitable, inclusive, and accessible workplaces, building the skills of the Federal workforce, attracting skilled talent, and championing the Federal workforce to better support Federal agency performance and mission for the American people. This budget addresses both OMB's guidance to prioritize equity and the President's Management Agenda (PMA) Priority 1.

Making the Federal Government a model employer is a multi-year effort, and OPM has built momentum toward this goal. For example, OPM issued a vision for the workforce of the future and a Playbook to support agencies in achieving this future state. OPM also made major progress on the regulatory front by publishing a final rule that prohibits the use of non-Federal salary history in setting pay for Federal employment offers, a final rule to implement the Fair Chance to Compete for Jobs Act, Notices of Proposed Rulemaking for refreshed Pathways regulations, a "Rule of Many" regulation, and a regulation to strengthen civil service protections.

OPM remains committed to continuing the work associated with advancing diversity, equity, inclusion, and accessibility (DEIA) through the Chief Diversity Officers Executive Council. To advance the Federal Government's DEIA efforts, OPM will publish guidance and develop a resource repository of best practices for agencies on a variety of DEIA topics, including training. For additional information on OPM's plans to foster diverse, equitable, inclusive, and accessible workplaces in FY 2025, please refer to the objective 1.1 section of the "Performance Budget by Strategic Goal" chapter of this document.

In the area of talent, the Federal Government must also attract the best and the brightest to explore careers in the Federal workforce and remain competitive in the job market. This budget invests in improvements to the Federal Government’s hiring experience (HX) by expanding pooled hiring through the Competitive Service Act. The funding would expand agencies’ use of USAJOBS Agency Talent Portal’s talent pools feature; support pooled hiring actions to drive a Tech Talent surge in AI, AI-enabling roles, cyber, data, and other technology and associated enabling roles; and further promote the robust sharing of certificates and cross-agency coordination on hiring.

The FY 2025 budget builds on OPM’s success helping Bipartisan Infrastructure Law agencies fill 100 percent of their surge hiring positions. OPM intends to leverage its surge hiring partnerships to help agencies hire AI technical talent and will do so by developing comprehensive in-person and online training and curriculum on pooled hiring actions, upgrading its talent acquisition automation tools to source and screen candidates more effectively, and building web enhancements that will enable candidates to be considered for multiple opportunities and for hiring actions to yield multiple offers. OPM will identify additional promising hiring practices that can be scaled to address mission critical skills gaps and deploy new features in talent acquisition systems to improve HR and hiring managers’ experience. OPM will also pilot a Government-wide HR internship program and develop a prototype skills/career exploration tool. For additional information on OPM’s plans to build the skills of the Federal workforce and attract talent in FY 2025, please refer to the objective 1.3 section of the “Performance Budget by Strategic Goal” chapter of this document.

## **Goal 2: Transform OPM’s organizational capacity and capability to better serve as the leader in Federal human capital management**

OPM has been focused on building its internal capabilities and improving employee experience and has demonstrated progress on those focus areas.

The Agency made notable progress by significantly improving the satisfaction scores of its mission support functions. In the most recent Mission Support Satisfaction Survey administered by the General Services Administration (GSA), OPM substantially improved supervisors’ satisfaction in the following areas:

- Contracting - OPM achieved a ranking of 5 of 24 CFO Act agencies, an improvement from 15 in 2021;

- Budget Formulation – OPM substantially improved supervisors’ satisfaction, achieving a ranking of 6 of 24 CFO Act agencies, an improvement from 19 in 2021;
- IT – OPM substantially improved employees’ satisfaction achieving a ranking of 12 of 24 CFO Act agencies, an improvement from 20 in 2021; and
- Human Capital Management – OPM achieved a ranking of 4 of 24 CFO Act agencies for supervisors’ satisfaction, an improvement from 6 of 24 in 2021.

To further drive the Agency’s work related to Goal 2, OPM has embarked on a multi-year journey to modernize IT systems. Reflecting OPM’s commitment to improving technology, the agency deployed OPM’s Enterprise Cloud, implemented critical cloud-based security protections, and deployed the first chatbot to support retirement survivor benefits. In FY 2025, OPM will transition legacy IT systems and applications, including mainframe applications to cloud technology and services, deploy the Postal Service Health Benefit System (which includes eligibility, enrollment, and decision support functionality), and expand the use of chatbots with AI and knowledge base capability to extend customer engagement. For the Trust Fund Modernization Program, OPM is on track for the completion of Release II and will continue to transition legacy IT systems and applications, including mainframe applications, to cloud technology and services in FY 2025.

To continue upskilling and supporting our workforce, the FY 2025 budget will build OPM’s capabilities through the creation of an Executive Candidate Development Program, development of rotational opportunities for early career talent, establishment of an OPM mentoring program, and implementation of a plan to address skills gaps in OPM’s mission critical occupations.

For additional information on OPM’s plans to transform the agency’s organizational capacity and capability in FY 2025, please refer to the Goal 2 section of the “Performance Budget by Strategic Goal” chapter of this document.

### **Goal 3: Create a human-centered customer experience by putting the needs of OPM's customers at the center of OPM's workforce services, policy, and oversight**

Improving the experience of OPM’s customers – including agencies, beneficiaries, annuitants and their families, the Federal workforce at large, and job applicants – and strengthening OPM’s customer service capabilities and culture is foundational to OPM’s mission and its



Strategic Plan. OPM will continue its momentum from FY 2023 investments that aid in piloting a fully digital retirement case processing method, delivering routine operations and maintenance for an Online Retirement Application (ORA) as well as a Digital File System (DFS) minimally viable product. Additionally, OPM will continue building on pilot initiatives to improve the annuitant experience like the online retirement guide and chatbot. Retirement Services will use data-driven evaluations of these pilots to inform additional ways to better answer annuitant questions, including using AI to enhance customer experience. These investments directly address the agency's commitment to prioritize customer experience and support the PMA's Priority 2, with its focus on High Impact Service Providers.

OPM will also expand and enhance recruitment features available through the USAJOBS Agency Talent Portal to connect agencies with qualified candidates, evaluate the effectiveness of the similar jobs machine-learning feature that identifies jobs relevant to individual jobseekers, rebuild the USAJOBS self-service online Help Centers to improve performance and allow for enhancements and updates that meet users' needs, and expand Voice of the Customer activities to further personalize the USAJOBS experience to help job applicants find the right opportunity.

More broadly, this budget will support an enterprise cultural shift to make all parts of OPM more customer-focused, with associated improvements in customer experience across the agency. This will include a focus on an enterprise approach to making data-driven, customer experience improvements and continuing to develop customer experience skillsets through training and hiring.

For additional information on OPM's plans to create a human-centered customer experience in FY 2025, please refer to the Goal 3 section of the "Performance Budget by Strategic Goal" chapter of this document.

## **Goal 4: Provide innovative and data-driven solutions to enable agencies to meet their missions**

To function as the Federal Government's strategic human capital leader, OPM must increasingly provide agencies with solutions to their most difficult human capital problems, becoming more proactive, innovative, and data-driven. Doing so will require removing unnecessary administrative burdens, accelerating workforce policymaking, and investing in core data capabilities to improve the quality and usability of one of the world's largest datasets of human capital information.

OPM has already begun to provide such solutions. OPM developed and released its FY 2023-2026 Data Strategy, launched the first Federal Human Capital Data Analytics Community of Practice, and rolled out a new data portal to seamlessly deliver human capital data products and services to agencies, employees, and the public. Data products included in the rollout include the OPM Federal Employee Viewpoint Survey (FEVS), Cyber Workforce, and Hiring Manager Satisfaction dashboards. OPM also launched Attrition and Time-to-Hire (role-based) dashboards and is piloting a DEIA dashboard with agency partners that will be available to all agencies by the end of the fiscal year. In FY 2025, OPM will embed and extend its capabilities, which includes developing an enterprise human capital analytics platform that provides advanced levels of automation including the use of AI and Machine Learning (ML), reduces reporting burden for agencies, and integrates Government-wide human capital, industry, and contextual data. By making this data more accessible in a unified platform, leaders and analysts at Federal agencies will be better positioned to use this data to inform policies and gain deeper insights. Likewise, Federal employees will be able to see their data and be equipped to make career decisions. Furthermore, OPM will deliver high-quality workforce planning data analytics products Government-wide. OPM will conduct research on agencies that are leading in key areas and share leading practices, conduct evaluations of key workforce policies, increase proactive policymaking by analyzing emerging trends, develop clear standards for agency data calls, and enhance data analysis options to streamline reporting processes for agencies. It will also invest in sharing cross-government best practices through road shows and webinars on a range of topics, including new delegations of authority.

For additional information on OPM’s plans to provide innovative and data-driven solutions in FY 2025, please refer to the Goal 4 section of the “Performance Budget by Strategic Goal” chapter of this document.

## Implement the Postal Service Reform Act

The Postal Service Reform Act of 2022 (PSRA, Public Law 117-108) requires OPM to establish the Postal Service Health Benefits (PSHB) Program, a new health benefits program for 1.9 million United States Postal Service (USPS) employees, annuitants, and their eligible family members, starting in January 2025, that will operate within, but separate from, the Federal Employee Health Benefits (FEHB) Program. The first enrollment period for the PSHB Program will begin during the Federal Benefits Open Season in November 2024. To meet this requirement, contracts with approved health insurance carriers, core back-end technical systems, intra- and inter-agency data linkages for eligibility determination and enrollment,

front-end user interfaces, and customer service infrastructure must be ready to meet the anticipated customer need. OPM is taking an enterprise approach to delivering this ambitious and modernized approach to providing health benefits under extremely tight deadlines. In addition to bringing together program offices across the agency, OPM is working collaboratively with USPS on communicating to employees about the changes and partnering with agencies across Government to provide the necessary data integration to determine eligibility. While OPM originally envisioned a new end-to-end customer support solution, given current resources, OPM is implementing a contingency option heavily leveraging existing USPS and OPM resources while re-prioritizing available Postal funds to supplement. Detailed plans regarding the Postal Service Reform Act implementation are available in a subsequent chapter in this document.

## FY 2025 Technology Modernization

This budget request proposes no-year funding to continue incremental progression with tangible results and benefits to the agency and our customers in the agency's migration to the cloud, enhance OPM's cybersecurity posture, and continue to improve the experience of OPM's customers. OPM is also utilizing its IT Working Capital Fund as authorized by the Modernizing Government Technology Act to help finance future technology modernization. At the beginning of FY 2024, \$6.7 million was available within the IT Working Capital Fund. These resources along with the continuation of no-year funding investments will permit OPM to accelerate IT modernization investments.

## Safeguarding OPM's Information Technology

The Office of the Chief Information Officer (OCIO) has focused on reducing risks and improving the customer experience of OPM's IT systems, applications, and environments through the migration of its systems to cloud services, consolidating and eliminating data centers, and using other agencies' shared services, consistent with the requirements of OMB Memorandum M-19-19 and Executive Order 13800.

This FY 2025 budget continues to incrementally fund investments to support OPM's IT modernization by supporting the migration of on-premises information systems to the cloud, continuing a multi-year effort to replace the agency's systems and applications with cloud-based solutions. As previously noted, DCSA has shared OPM's cybersecurity, network support, Help Desk, and IT contract expenses to support the legacy background investigation system. By FY 2025, DCSA is on track to migrate the legacy system to its own dedicated network. This

migration will eliminate DCSA traffic and shared IT support costs associated with OPM's network. The budget request will finance cybersecurity and network operations infrastructure once the DCSA complete their migration to their own platform.

OPM is committed to maintaining critical cybersecurity operations and protections. This FY 2025 budget supports a comprehensive security operations program that protects OPM's environment continuously and in real-time. It also allocates resources to an enterprise-wide, centralized cybersecurity office that governs security operations, performs continuous monitoring, and establishes new and refines existing OPM IT security policies. This office issues and implements policies that incorporate emerging technologies, mitigate evolving cyber threats, and facilitate data-driven, risk-based oversight of agency-wide business programs.

### Technology Modernization Investments

The FY 2025 budget requests **\$10,710,000** in no-year authority to continue to address and correct decades of technology debt related to personnel, enterprise infrastructure, and operations while also making significant improvements that will pivot OPM into a digital-first agency, provide improved customer experience, and enhance our cyber posture. This is a decrease from prior years as the Trust Funds Financial System Release II graduates to full implementation in FY 2024, and operations and maintenance costs are budgeted within the Trust Fund Limitation allocation. In FY 2025, OPM will identify and implement Artificial Intelligence (AI) solutions, transition on-premise systems to the cloud, and will modernize the external website and intranet. OPM will utilize IT Modernization funding to fully transition to cloud technology and services and evaluate and deploy emerging technology. Specifically, the IT Modernization funding will fund the following strategic areas:

- **Retirement Services (\$3,500,000):** OPM will continue rolling out the RS Online Retirement Application (ORA) and will deploy the Janus Retirement Calculation Service. Paired with funding from Retirement Services, the IT modernization funding will move these applications to full deployment. The benefits include improving the customer experience and shortening processing times for future retirement applications and addressing delays and the current backlog.
  - Milestone: Initial Operational Capability for ORA and the Janus Retirement Calculation Service.
- **Mainframe Upgrades to Support Retirement Processing (\$3,100,000):** Modernizing the Mainframe code is a priority for the agency. To maximize the security and lifespan of

the existing Mainframes, OPM must upgrade and replace individual, end-of-life hardware components. This strategic investment will defer the need to purchase two new Mainframes at the cost of approximately \$22,000,000 in FY 2025 or FY 2026 while OPM transitions applications and systems to the cloud technology and services.

- Milestone: Upgrade and replace individual, end-of-life Mainframe hardware components.
- **Contractor Expertise (\$2,600,000):** In order for OPM to continue to implement new requirements of Executive Order 14110 on the Safe, Secure, and Trustworthy Development and Use of Artificial Intelligence requires agencies to reduce barriers to the responsible use of AI, including barriers related to information technology infrastructure, data, workforce, budgetary restrictions, and cybersecurity processes. OCIO will contract for technical expertise to fill gaps in the current workforce while training the current employees in the proper use of AI.
  - Milestone: Develop requirements and compete a task order to obtain the necessary technical expertise to properly leverage AI at OPM.
  - Milestone: With the contractor in place, determine and initiate the first pilots that leverage AI to potentially improve both internal OPM processes and government-wide HR functions.
- **OPM.gov and Intranet Development and Enhancements (\$1,000,000):** While OPM acquired Technology Modernization Funds (TMF) funds to deploy the minimally viable product (MVP) for OPM.gov in FY 2023 and FY 2024, additional funding is needed in FY 2025 for continued development and enhancements to both the public-facing website (OPM.gov) and the intranet (MyTheo).
  - Milestone: Initial Operational Capability for the public facing OPM.gov website and an intranet website for internal OPM use by early FY 2025.
- **Software License Management Tool (\$500,000):** As OPM modernizes the OPM enterprise, OCIO has seen an increased demand for software licenses. OPM will procure and implement a software license management tool to enable proactive license governance, allocation, and utilization while strengthening compliance and alignment with changing government standards. Continuing to operate without the software license management tool could cause potential duplication, over-licensing, or the misallocation of licenses.

- Milestone: Develop governance and staffing model for effective management of an enterprise software management tool.
- Milestone: Procure and implement the software license management tool and oversight processes.

## Creating a Digital-First Federal Annuitant Customer Experience

OPM understands the imperative to create a more modern retirement experience for Federal employees who earned these benefits over a career serving the American public. Essential to creating an excellent customer experience is digitizing OPM's currently largely paper-centric process. OPM's strategy involves creating a more streamlined Federal annuitant experience starting with a digital application that will make it easier for annuitants to apply and speed up the time they get their annuity. OPM projects that this will also reduce the need for annuitants to spend time following up on progress.

OPM has begun to develop an Online Retirement Application (ORA), a portal that will allow retirees, agencies, and payroll providers to submit retirement applications online. The FY 2025 budget requests incremental funding to continue development of the ORA and to scale up the population of Federal employees who may have access to it. In concert with efforts to receive retirement applications online, OPM has begun to develop the capability to accept and store digital applications in a minimally viable product – the Digital File System – and continues to streamline and refine the retirement application experience. Once completed, the ORA is expected to improve the quality of retirement applications by catching omissions or errors in applications before they are submitted to OPM, resulting in accelerated processing times. The expansion of the Digital File System, when completed, will result in end-to-end technology for accepting, storing, and managing digital retirement applications. These electronic case management capabilities are foundational to a modern retirement system. These systems will enable OPM's Retirement Services (RS) to digitally manage cases over the span of the annuitant's career journey and will provide RS staff workflow capabilities for timely and accurate case processing. These case management capabilities will make relevant information easily available to retirement case processors, which will reduce processing time, reduce reliance on paper files, and improve the accuracy of retirees' applications. A fully implemented Digital File System expands capabilities for customer self-service, which should relieve demand on Retirement Services call center staff resulting in a better customer experience. It will also eventually reduce the time-consuming, environmentally-taxing manual steps to print and compile case files, further accelerating case processing, reducing errors, and enabling staff to

better serve customers.

Overall, OPM envisions a multi-year journey that will transform our retirement benefits operation. This is not a single-year effort, as this undertaking will require consistent and significant resource investments. These transformations, if completed quickly, may additionally defray the future cost associated with replacement of existing mainframe technologies (and capabilities) before their approaching end-of-life. The FY 2025 budget supports only our minimally viable efforts to date.

## FY 2025 Budget Request by Fund

OPM estimates that its total operating budget in FY 2025 will be **\$1,352,002,717**. OPM is funded by a variety of sources that include annual Salaries and Expenses appropriations, discretionary transfers from the Earned Benefit Trust Funds (noted in tables as Trust Fund Annual), multiple mandatory administrative authorities, a revolving fund, and other interagency transactions (Advances and Reimbursements). Additionally, OPM’s Office of the Inspector General receives a separate appropriation and separate transfer authority from the Trust Funds for the responsibilities of the Office of the Inspector General (OIG).

### OPM Budget by Fund FY 2023 through FY 2025

OPM Budget Authority	FY 2023 Enacted	FY 2024	
		Annualized CR	FY 2025 CBJ
<b>Discretionary Appropriation</b>	<b>\$385,708,000</b>	<b>\$414,000,000</b>	<b>\$465,800,000</b>
<b>Salaries and Expenses Total</b>	<b>\$190,784,000</b>	<b>\$219,076,000</b>	<b>\$205,237,000</b>
Salaries & Expenses	\$171,411,000	\$199,703,000	\$194,527,000
IT Modernization S&E	\$19,373,000	\$19,373,000	\$10,710,000
Postal Reform S&E - No Year	\$0	\$0	\$0
<b>Trust Fund Annual Total</b>	<b>\$194,924,000</b>	<b>\$194,924,000</b>	<b>\$260,563,000</b>
<b>Mandatory Administrative Authorities</b>	<b>\$88,974,679</b>	<b>\$99,259,519</b>	<b>\$107,652,470</b>
<b>Trust Fund Mandatory Authority</b>	<b>\$88,974,679</b>	<b>\$99,259,519</b>	<b>\$107,652,470</b>
5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$76,822,619	\$81,575,885	\$87,171,771
5 U.S.C. § 8958(f)(2)(A) & 5 U.S.C. § 8988(f)(2)(A) - Dental & Vision	\$9,223,093	\$14,788,910	\$17,347,684
5 U.S.C. § 9004(f)(B) - Long-Term Care	\$1,559,673	\$1,525,429	\$1,642,171
FERCCA (P.L. 106-265) - Retirement	\$1,369,294	\$1,369,295	\$1,490,844
<b>Revolving Fund</b>	<b>\$618,624,426</b>	<b>\$661,914,698</b>	<b>\$715,978,127</b>
<b>Advance and Reimbursements</b>	<b>\$52,551,021</b>	<b>\$54,143,143</b>	<b>\$19,872,119</b>
<b>OIG Discretionary Appropriation</b>	<b>\$36,395,000</b>	<b>\$36,395,000</b>	<b>\$42,700,000</b>
Salaries & Expenses - OIG	\$6,908,000	\$6,908,000	\$7,144,000
Trust Fund Annual - OIG	\$29,487,000	\$29,487,000	\$35,556,000
<b>OPM Total</b>	<b>\$1,182,253,126</b>	<b>\$1,265,712,360</b>	<b>\$1,352,002,717</b>

OPM’s discretionary request consists of an appropriation for OPM’s program and leadership activities, and a limitation on transfers from the Earned Benefits Trust Funds under OPM management. OPM’s FY 2025 discretionary request is **\$465,800,000**.



OPM also manages mandatory appropriations that provide for the transfer of resources from the Government's general fund to the Earned Benefits Trust Funds for Federal employees' and annuitants' benefits. The Trust Funds and the associated mandatory appropriations are discussed in more detail in the Earned Benefit Trust Funds section of this budget. Each OPM fund is described below.

## Salaries and Expenses

OPM requests **\$205,237,000** in Salaries and Expenses (S&E) funds for personnel and non-personnel resources, which includes **\$10,710,000** for IT Modernization efforts. These efforts will be focused on IT transformation in Retirement Services and Healthcare and Insurance, revamping OPM.gov, OPM's public-facing website, and other incremental legacy IT transformations. The S&E appropriation funds the agency's various program offices as they implement OPM's strategic plan and perform OPM's core statutory roles, including providing direction and oversight to other Federal agencies.

## Trust Fund Transfers

For the administration of the civil service retirement and insurance programs, OPM requests **\$260,563,000** in administrative transfers from the Earned Benefits Trust Funds. For FY 2025, this includes **\$52,175,000** in resources that OPM will use to administer the Postal Service Health Benefits (PSHB) Program. The FY 2024 Congressional Budget Justification (CBJ) requested appropriated funding under Salaries and Expenses. However, this budget submission seeks to redistribute those resources to Trust Fund Limitation to align the financing of the PSHB Program with other agency-managed health benefit programs. OPM is responsible for managing the Federal Government's health benefits under the Federal Employees Health Benefits (FEHB) Program and beginning January 1, 2025, the PSHB Program, within the FEHB, for Postal employees, annuitants, and their eligible family members. OPM also manages the Government's life insurance benefits via the Federal Employees' Group Life Insurance (FEGLI) Program. In addition, OPM administers the Civil Service Retirement System (CSRS) and Federal Employees Retirement System (FERS), which are financed by the Civil Service Retirement and Disability Fund (CSRDF). The administrative Trust Fund transfers in part fund the following organizations: Retirement Services (RS), Healthcare and Insurance (HI), Office of the Chief Information Officer (OCIO), and Office of the Chief Financial Officer (OCFO).

These transfers are described as Trust Fund Annual in this request and come from the following Trust Funds subject to Congressional limitation:

- Civil Service Retirement and Disability Fund (CSRDF);
- Employees Health Benefits Fund (FEHBF); and
- Employees' Group Life Insurance Fund (FEGLI).

## Mandatory Administrative Authorities

Several provisions under Title 5 of the United States Code (U.S.C.) and the Federal Erroneous Retirement Coverage Corrections Act (FERCCA) authorize OPM to administer specific retirement program and insurance activities, and to transfer funds for the administrative cost of these activities from the Trust Funds. These authorities provide additional administrative transfers from the Trust Funds. Per 5 U.S.C. §8348 (a)(1)(B), OPM incurs expenses from the Civil Service Retirement and Disability Fund (CSRDF) for the following activities:

- Administering survivor annuities and elections (§8339 and §8341) and other annuity alternatives (§8343a and §8420a);
- Making discretionary allotments and assignments (§8345(h) or §8465(b)) and withholding State income taxes on monthly annuities (§8345(k) or §8469) upon annuitant request;
- Administering Federal tax withholding pursuant to section 3405 of Title 26;
- Administering cost-of-living annuity adjustments (§8340 or §8462); and
- Administering fraud prevention (§8345, §8345a, §8466, and §8466a).

Within the CSRDF, OPM may also incur expenses as deemed appropriate for the administration of FERCCA (P.L. 106-265, Title II, Sept. 19, 2000, 114 Stat. 762). OPM may incur expenses to administer the Federal Long Term Care Insurance Program (FLTCIP) from Federal Employees' Group Life Insurance (Id. at Title I, §1002(a), codified at 5 U.S.C. §9004(f)(B)). Within the FEHB Program, OPM may defray reasonable expenses to administer the Federal Employees Dental and Vision Insurance Program (FEDVIP) (5 U.S.C. §8958 (f)(2)(A) and §8988 (f)(2)(A)). Resources used to administer the FLTCIP and FEDVIP are reimbursed to the FLTCIP and FEDVIP funds by the participating insurance carriers from the respective Programs' premium income, which is comprised entirely of enrollee-paid contributions.

## Revolving Fund Activities

Business Line		FY 2024 Estimate	FY 2025 Estimate	Increase Decrease
Suitability Executive Agent	Revenue	\$8,665,535	\$11,486,228	\$2,820,693
	Obligations	\$11,346,637	\$11,732,689	\$386,052
Human Resources Solutions	Revenue	\$396,137,283	\$430,171,522	\$34,034,239
	Obligations	\$383,238,719	\$433,654,876	\$50,416,157
Enterprise Human Resources Integration	Revenue	\$26,666,589	\$22,176,980	(\$4,489,609)
	Obligations	\$40,766,122	\$40,066,689	(\$699,433)
HR Line of Business	Revenue	\$3,150,000	\$3,150,000	\$0
	Obligations	\$3,150,000	\$3,150,000	\$0
Human Resources Solutions Information Technology Program Management Office	Revenue	\$82,915,000	\$88,500,000	\$5,585,000
	Obligations	\$117,754,429	\$115,475,705	(\$2,278,725)
Credit Monitoring	Revenue	\$90,055,102	\$98,398,169	\$8,343,067
	Obligations	\$92,158,791	\$98,398,169	\$6,239,378
Federal Executive Boards	Revenue	\$13,500,000	\$13,500,000	\$0
	Obligations	\$13,500,000	\$13,500,000	\$0
<b>Total Revenue</b>		<b>\$621,089,509</b>	<b>\$667,382,899</b>	<b>\$46,293,390</b>
<b>Total Obligations*</b>		<b>\$661,914,698</b>	<b>\$715,978,127</b>	<b>\$54,063,429</b>

\* When obligations exceed revenue, it is because business lines use unobligated balances from prior years (i.e., carryover).

OPM estimates **\$715,978,127** in obligations in its Revolving Fund in FY 2025. OPM's Revolving Fund was established by the Congress as a means of financing those activities that OPM is required or authorized to perform on a reimbursable basis (such as OPM's obligation to oversee the Government-wide suitability, fitness, and credentialing programs and assess the suitability of applicants for the service when certain issues arise) and allows OPM to provide personnel management services to other Federal agencies via several well-established programs. Federal agencies pay OPM based on customer transactions, orders, fixed fees, or proportional contribution to cost. Broadly classified into seven groups -- Suitability Executive Agent Programs (SuitEA), Human Resources Solutions (HRS), Enterprise Human Resources Integration (EHRI), HR Line of Business (HRLoB), Human Resources Solutions Information Technology Program Management Office (HRSITPMO) Credit Monitoring Services and Identity Protection Services, and Federal Executive Boards (FEB) -- these activities are performed across several OPM organizations by Federal staff and contractors qualified for the service.

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FY 2024 & FY 2025 Comparison of FTE — All Resources

OPM Budget Authority	FY 2024 Annualized CR	FY 2025 CBJ
<b>Salaries and Expenses</b>	<b>904.5</b>	<b>821.1</b>
<b>Trust Fund Annual</b>	<b>760.5</b>	<b>914.7</b>
<b>Trust Fund Mandatory Authority</b>	<b>479.0</b>	<b>479.6</b>
5 U.S.C. § 8348 (a)(1)(B) - Retirement	445.1	447.7
5 U.S.C. § 8958(f)(2)(A) & 5 U.S.C. § 8988(f)(2)(A) - Dental &	21.1	19.9
5 U.S.C. § 9004(f)(B) - Long-Term Care	5.8	4.9
FERCCA (P.L. 106-265) - Retirement	7.0	7.0
<b>Revolving Fund</b>	<b>855.9</b>	<b>921.3</b>
<b>Advances &amp; Reimbursements</b>	<b>38.0</b>	<b>32.7</b>
<b>OIG Discretionary Total</b>	<b>155.1</b>	<b>183.1</b>
Salaries & Expenses - OIG	20.2	22.1
Trust Fund Annual - OIG	135.0	161.0
<b>OPM Total</b>	<b>3,193.2</b>	<b>3,352.4</b>

OPM’s FY 2025 budget supports **3352.4** full-time-equivalents (FTEs). Of this total, the discretionary appropriation and Mandatory Trust Fund transfers will fund **2215.3** FTEs (the sum of the Salaries and Expenses, Trust Fund Limitations, and Mandatory Trust Fund Authority totals). These employees deliver OPM’s Government-wide responsibilities relating to human capital management leadership, benefits, and additional mission and mission support activities. An additional **1137.0** FTEs are funded by the Revolving Fund, Advances and Reimbursements, and Office of the Inspector General (OIG).

### Adjustments to Discretionary Request

Of the requested **\$51.8 million** increase in OPM discretionary appropriations, **\$22.8 million** (44 percent) will provide for pay adjustments, and other adjustments necessary to maintain current services. Base changes include:

#### Salaries and Expenses Adjustments

**Operational Gap for Current Services (\$10,000,000):** An increase of **\$10 million** to fund current IT services. This funding will support an increase to OPM’s Common Services financing to support OPM’s Federal Information Technology Programs within the Office of the Chief Information Officer by funding critical cyber security contracts and services. DCSA will finally migrate the legacy background investigation system to its dedicated network by 2025. This migration will eliminate DCSA traffic and shared IT support costs associated with OPM’s

network.

**Realignment of Postal Service Health Benefits Program (-\$28,175,000):** This budget also reflects the realignment of \$28.2 million for the Postal Service Health Benefits (PSHB) Program from S&E to Trust Fund Annual based on FY 2025. This adjustment finances the PSHB Program within the FEHB Program from the same funding source, the Employees Health Benefits Fund.

**Cost of Living Adjustments (\$2,100,000):** to provide for increased pay and benefit obligations for OPM personnel. This includes an assumed federal pay adjustment of 2 percent, effective January 2025. The pay raise cost increase also accounts for residual impacts of the 5.2 percent pay increase from January 2024 (\$500,000) and three quarters from FY 2025 at 2 percent (\$1.6 million).

**OPM Hiring Experience (\$5,000,000):** An increase of **\$5 million** in S&E to invest in OPM Hiring Experience (HX) capacity and expand pooled hiring through the Competitive Service Act within the Workforce Policy and Innovation program.

## Trust Fund Transfers Adjustments

**Operational Gap for Current Services (\$4,000,000):** An increase of **\$4 million** to fund current IT services. This funding will support an increase to OPM's Common Services financing to support OPM's Federal Information Technology Programs within the Office of the Chief Information Officer by funding critical cyber security contracts and services. DCSA will finally migrate the legacy background investigation system to its dedicated network by 2025. This migration will eliminate DCSA traffic and shared IT support costs associated with OPM's network.

**Realignment of Postal Service Health Benefits Program (\$28,175,000):** A realignment of \$28.2 million for the PSHB Program from S&E to Trust Fund Annual based on FY 2025. This adjustment finances the PSHB Program within the FEHB Program from the same funding source, the Employees Health Benefits Fund.

**Postal Service Health Benefits Program (\$24,000,000):** An increase of **\$24 million** to OPM's Trust Fund Annual to fund critical infrastructure and operations and maintenance costs in the PSHB Program. These costs include:

- \$650,000 for OCFO to support additional financial management and transaction processing support;
- \$19.1 million for OCIO to support system licensing costs;
- \$808,000 for RS to increase staff support for annuitant calls post open season; and

- \$3.4 million for HI to support O&M costs for the Customer Support Center for the PSHB Program.

**Retirement Services IT (\$3,000,000):** OPM is requesting \$3 million of Trust Fund Annual to support continued investment in Retirement Services IT for the Online Retirement Application (ORA) and Digital File System (DFS). The investment for ORA is expected to improve the quality of retirement applications by catching omissions or errors in applications before they are submitted to OPM, resulting in accelerated processing times.

**Cost of Living Adjustments (\$3,000,000):** to provide for increased pay and benefit obligations for OPM personnel. This includes an assumed federal pay adjustment of 2 percent, effective January 2025. The pay raise cost increase also accounts for residual impacts of the 5.2 percent pay increase from January 2024 (\$700 thousand) and three quarters from FY 2025 at 2 percent (\$2.3 million).

FY 2025 FTE by Organization and Fund — All Resources

Organizations	Salaries & Expenses	IT Modernization S&E	Trust Fund Annual	Trust Fund Mandatory Authority	Common Services	Advances & Reimbursements	Revolving Fund	OPM Total
Centrally Funded Items	1.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>1.0</b>
Congressional, Legislative and Intergovernmental Affairs	16.0	0.0	1.0	0.0	0.0	0.0	0.0	<b>17.0</b>
Equal Employment Opportunity	0.0	0.0	0.0	0.0	7.0	0.0	0.0	<b>7.0</b>
Facilities, Security & Emergency Management	2.0	0.0	5.0	0.0	66.3	15.7	0.0	<b>89.0</b>
Federal Prevailing Rate Advisory Committee	1.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>1.0</b>
Healthcare & Insurance	0.0	0.0	230.6	25.1	0.0	0.0	0.0	<b>255.6</b>
HR Solutions	0.0	0.0	0.0	0.0	0.0	0.0	607.0	<b>607.0</b>
Human Capital Data Management and Modernization	34.3	0.0	0.0	0.0	0.0	0.0	36.8	<b>71.0</b>
Merit System Accountability & Compliance	84.0	0.0	1.0	0.0	5.0	2.0	0.0	<b>92.0</b>
Office of Communications	14.0	0.0	3.0	0.0	0.0	0.0	0.0	<b>17.0</b>
Office of Diversity, Equity, Inclusion and Accessibility	15.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>15.0</b>
Office of Procurement Operations	6.0	0.0	2.0	0.0	28.5	0.0	0.0	<b>36.5</b>
Office of Small and Disadvantaged Business Utilization	0.0	0.0	0.0	0.0	2.0	0.0	0.0	<b>2.0</b>
Office of the Chief Financial Officer	4.3	0.0	48.0	0.0	62.5	0.0	3.5	<b>118.3</b>
Office of the Chief Information Officer	63.0	0.0	37.9	1.1	66.8	0.0	152.0	<b>320.8</b>
Office of the Director	29.0	0.0	0.0	0.0	0.0	4.0	0.0	<b>33.0</b>

Organizations	Salaries & Expenses	IT Modernization S&E	Trust Fund Annual	Trust Fund Mandatory Authority	Common Services	Advances & Reimbursements	Revolving Fund	OPM Total
Office of the Executive Secretariat, Privacy, and Information Management	7.0	0.0	1.0	0.0	14.0	0.0	0.0	<b>22.0</b>
Office of the General Counsel	0.0	0.0	1.5	0.0	39.5	0.0	0.0	<b>41.0</b>
OPM Human Resources	1.0	0.0	4.0	0.0	59.0	0.0	0.0	<b>64.0</b>
Retirement Services	0.0	0.0	579.7	453.4	0.0	0.0	0.0	<b>1,033.1</b>
Security, Suitability and Credentialing Line of Business (SSCLOB)	0.0	0.0	0.0	0.0	0.0	11.0	0.0	<b>11.0</b>
Suitability Executive Agent Programs	0.0	0.0	0.0	0.0	0.0	0.0	59.0	<b>59.0</b>
White House Fellows	3.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>3.0</b>
Workforce Policy and Innovation	190.0	0.0	0.0	0.0	0.0	0.0	63.0	<b>253.0</b>
<b>OPM Total</b>	<b>470.5</b>	<b>0.0</b>	<b>914.7</b>	<b>479.6</b>	<b>350.6</b>	<b>32.7</b>	<b>921.3</b>	<b>3,169.3</b>

FY 2024 FTE by Organization and Fund — All Resources

Organizations	Salaries & Expenses	IT Modernization S&E	Trust Fund Annual	Trust Fund Mandatory Authority	Common Services	Advance and Reimbursements	Revolving Fund	OPM Total
Centrally Funded Items	1.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>1.0</b>
Chief Human Capital Officer Council	0.0	0.0	0.0	0.0	0.0	4.0	0.0	<b>4.0</b>
Congressional, Legislative and Intergovernmental Affairs	18.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>18.0</b>



Organizations	Salaries & Expenses	IT Modernization S&E	Trust Fund Annual	Trust Fund Mandatory Authority	Common Services	Advance and Reimbursements	Revolving Fund	OPM Total
Equal Employment Opportunity	0.0	0.0	0.0	0.0	6.3	0.0	0.0	<b>6.3</b>
Facilities, Security & Emergency Management	7.0	0.0	0.0	0.0	62.5	14.7	0.0	<b>84.2</b>
Federal Prevailing Rate Advisory Committee	0.5	0.0	0.0	0.0	0.0	0.0	0.0	<b>0.5</b>
Healthcare & Insurance	71.0	0.0	146.6	27.3	0.0	0.0	0.0	<b>244.9</b>
HR Solutions	0.0	0.0	0.0	0.0	0.0	0.0	527.0	<b>527.0</b>
Human Capital Data Management and Modernization	29.3	0.0	0.0	0.0	0.0	0.0	37.4	<b>66.8</b>
Merit System Accountability & Compliance	84.8	0.0	0.0	0.0	5.0	2.0	0.0	<b>91.8</b>
Office of Communications	18.5	0.0	0.0	0.0	0.0	0.0	0.0	<b>18.5</b>
Office of Diversity, Equity, Inclusion and Accessibility	15.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>15.0</b>
Office of Procurement Operations	7.6	0.0	0.0	0.0	26.2	0.0	0.0	<b>33.8</b>
Office of Small and Disadvantaged Business Utilization	0.0	0.0	0.0	0.0	2.0	0.0	0.0	<b>2.0</b>
Office of the Chief Financial Officer	6.8	3.8	38.5	0.0	56.7	0.0	3.5	<b>109.3</b>

Organizations	Salaries & Expenses	IT Modernization S&E	Trust Fund Annual	Trust Fund Mandatory Authority	Common Services	Advance and Reimbursements	Revolving Fund	OPM Total
Office of the Chief Information Officer	62.6	16.0	26.5	1.6	51.2	7.3	173.0	<b>338.0</b>
Office of the Director	29.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>29.0</b>
Office of the Executive Secretariat, Privacy, and Information Management	7.0	0.0	0.0	0.0	11.9	0.0	0.0	<b>18.9</b>
Office of the General Counsel	1.5	0.0	0.0	0.0	37.5	0.0	0.0	<b>39.0</b>
OPM Human Resources	4.0	0.0	0.0	0.0	59.3	0.0	0.0	<b>63.3</b>
Retirement Services	29.0	0.0	549.0	450.1	0.0	0.0	0.0	<b>1,028.1</b>
Security, Suitability and Credentialing Line of Business (SSCLOB)	0.0	0.0	0.0	0.0	0.0	10.0	0.0	<b>10.0</b>
Suitability Executive Agent Programs	0.0	0.0	0.0	0.0	0.0	0.0	59.0	<b>59.0</b>
White House Fellows	4.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>4.0</b>
Workforce Policy and Innovation	169.8	0.0	0.0	0.0	0.0	0.0	56.0	<b>225.8</b>
<b>OPM Total</b>	<b>566.3</b>	<b>19.8</b>	<b>760.5</b>	<b>479.0</b>	<b>318.4</b>	<b>38.0</b>	<b>855.9</b>	<b>3,038.0</b>

## FY 2025 Budget Request by Object Class

The discretionary appropriation budget object class table shows how OPM intends to use its resources.

OPM’s FY 2025 discretionary budget increased by \$51.8 million from the FY 2024 Annualized CR. Salaries and Expenses decreased by \$14.3 million from the FY 2024 budget of \$219,076,00 and Trust Fund Limitation increased by \$66.1 million from the FY 2024 budget of \$194,924,000.

### Discretionary Appropriation Budget by Object Class

Object Class	FY 2024 Annualized CR	FY 2025 CBJ	Increase/Decrease
Personnel Compensation	\$182,583,431	\$195,080,214	\$12,496,783
Personnel Benefits	\$66,556,089	\$70,193,408	\$3,637,319
Benefits for Former Personnel	\$758,155	\$656,694	(\$101,461)
Travel and Transportation of Person	\$1,206,642	\$859,492	(\$347,150)
Transportation of Things	\$33,804	\$26,760	(\$7,044)
Communications, Utilities, and Rent	\$60,902,867	\$73,408,788	\$12,505,921
Printing and Reproduction	\$616,352	\$777,795	\$161,443
Other Services	\$99,849,306	\$123,841,404	\$23,992,098
Supplies and Materials	\$981,784	\$617,148	(\$364,636)
Equipment	\$296,192	\$338,297	\$42,105
<b>Total Object Class</b>	<b>\$414,000,000</b>	<b>\$465,800,000</b>	<b>\$51,800,000</b>
<b>FTE</b>	<b>1,665.1</b>	<b>1,735.8</b>	<b>70.7</b>

### Salaries and Expenses Budget by Object Class

Object Class	FY 2024 Annualized CR	FY 2025 CBJ	Increase/Decrease
Personnel Compensation	\$90,001,752	\$82,716,168	(\$7,285,584)
Personnel Benefits	\$31,904,246	\$28,840,171	(\$3,064,075)
Benefits for Former Personnel	\$200,000	\$200,000	\$0
Travel and Transportation of Person	\$882,053	\$454,005	(\$428,048)
Transportation of Things	\$832	\$814	(\$18)
Communications, Utilities, and Rent	\$37,041,232	\$45,043,139	\$8,001,907

Object Class	FY 2024 Annualized CR	FY 2025 CBJ	Increase/Decrease
Printing and Reproduction	\$210,977	\$192,677	(\$18,300)
Other Services	\$57,898,129	\$47,376,810	(\$10,521,319)
Supplies and Materials	\$565,910	\$204,191	(\$361,719)
Equipment	\$155,490	\$209,025	\$53,535
<b>Total Object Class</b>	<b>\$219,076,000</b>	<b>\$205,237,000</b>	<b>(\$13,839,000)</b>
<b>FTE</b>	<b>904.5</b>	<b>821.1</b>	<b>(83.4)</b>

The FY 2025 S&E request totals \$204,743,078, and the impacts are attributed to the following:

- Personnel Compensation and Benefits decreased by \$10.8 million to reflect a pay raise increase offset by the realignment of existing PSHB Program activities from S&E to TFA.
- Communications, utilities, and rent increased by \$8 million, resulting from reallocating costs between object class 23 and 25 to support IT Modernization.
- Other Services decreased by \$10.5 million, largely resulting from the realignment of financing for the PSHB Program from S&E to TFA.

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#### Trust Fund Limitation – Budget by Object Class

Object Class	FY 2024 Annualized CR	FY 2025 CBJ	Increase/Decrease
Personnel Compensation	\$92,581,679	\$112,364,046	\$19,782,367
Personnel Benefits	\$34,651,843	\$41,353,237	\$6,701,394
Benefits for Former Personnel	\$558,155	\$456,694	(\$101,461)
Travel and Transportation of Person	\$324,589	\$405,487	\$80,898
Transportation of Things	\$32,972	\$25,946	(\$7,026)
Communications, Utilities, and Rent	\$23,861,635	\$28,365,649	\$4,504,014
Printing and Reproduction	\$405,375	\$585,118	\$179,743
Other Services	\$41,951,176	\$76,464,594	\$34,513,418
Supplies and Materials	\$415,874	\$412,957	(\$2,917)
Equipment	\$140,702	\$129,272	(\$11,430)
<b>Total Object Class</b>	<b>\$194,924,000</b>	<b>\$260,563,000</b>	<b>\$65,639,000</b>
<b>FTE</b>	<b>760.5</b>	<b>914.7</b>	<b>154.1</b>

The FY 2025 Trust Fund Limitation fund request totals \$260,563,000. The \$66 million increase in resources impacts all object classes to finance earned benefit program activities across OPM. The most significant changes impacted the following areas:

- Personnel Compensation and Benefits increased by \$26.9 million, to finance the proposed pay raise, and the realignment of financing for the PSHB Program from S&E to TFA.
- Communications, Utilities, and Rent increased by \$4.5 million, which is attributable to the support of Retirement Services' open season healthcare annuitant mailings and PSHB Program operational costs.
- Other services increased by \$35.9 million to reflect the realignment of existing PSHB Program activities from S&E to TFA, and new PSHB Program requirements for FY 2025 within OCIO, HI, RS, OCFO that support system licensing costs, cloud hosting, cybersecurity, project management tools, and support services contracts.

OPM Budget FY 2024 CBJ & FY 2025 CBJ by Organization and Fund — Discretionary Resources

Organizations	FY 2024 Annualized CR				FY 2025 CBJ			
	Salaries and Expenses	Trust Fund Annual	Common Services	OPM Total	Salaries and Expenses	Trust Fund Annual	Common Services	OPM Total
Centrally Funded Items	\$3,815,512	\$0	\$0	<b>\$3,815,512</b>	\$4,358,616	\$775,340	\$0	<b>\$5,133,956</b>
Congressional, Legislative and Intergovernmental Affairs	\$3,358,112	\$0	\$0	<b>\$3,358,112</b>	\$3,284,938	\$230,093	\$0	<b>\$3,515,031</b>
Equal Employment Opportunity	\$0	\$0	\$1,172,975	<b>\$1,172,975</b>	\$0	\$0	\$1,238,025	<b>\$1,238,025</b>
Facilities, Security & Emergency Management	\$699,541	\$0	\$13,205,306	<b>\$13,904,847</b>	\$226,570	\$494,344	\$13,760,158	<b>\$14,481,072</b>
Federal Prevailing Rate Advisory Committee	\$176,000	\$0	\$0	<b>\$176,000</b>	\$179,520	\$0	\$0	<b>\$179,520</b>
Healthcare & Insurance	\$15,718,994	\$34,280,848	\$0	<b>\$49,999,842</b>	\$0	\$55,308,783	\$0	<b>\$55,308,783</b>
Human Capital Data Management and Modernization	\$11,643,377	\$0	\$0	<b>\$11,643,377</b>	\$12,129,979	\$0	\$0	<b>\$12,129,979</b>
Merit System Accountability & Compliance	\$13,740,050	\$0	\$953,630	<b>\$14,693,680</b>	\$14,267,076	\$140,130	\$1,006,681	<b>\$15,413,887</b>
Office of Communications	\$3,477,557	\$0	\$0	<b>\$3,477,557</b>	\$3,053,664	\$504,986	\$0	<b>\$3,558,650</b>

Organizations	FY 2024 Annualized CR				FY 2025 CBJ			
	Salaries and Expenses	Trust Fund Annual	Common Services	OPM Total	Salaries and Expenses	Trust Fund Annual	Common Services	OPM Total
Office of Diversity, Equity, Inclusion and Accessibility	\$5,279,224	\$0	\$0	<b>\$5,279,224</b>	\$5,454,570	\$0	\$0	<b>\$5,454,570</b>
Office of Procurement Operations	\$1,786,622	\$0	\$5,803,359	<b>\$7,589,981</b>	\$1,444,505	\$414,353	\$6,049,349	<b>\$7,908,207</b>
Office of Small and Disadvantaged Business Utilization	\$0	\$0	\$523,739	<b>\$523,739</b>	\$0	\$0	\$557,764	<b>\$557,764</b>
Office of the Chief Financial Officer	\$11,407,543	\$9,144,985	\$24,598,604	<b>\$45,151,132</b>	\$3,546,492	\$16,423,188	\$25,488,349	<b>\$45,458,029</b>
Office of the Chief Information Officer	\$48,008,148	\$11,141,045	\$50,907,632	<b>\$110,056,825</b>	\$46,099,540	\$32,896,951	\$79,209,788	<b>\$158,206,279</b>
Office of the Director	\$7,099,407	\$0	\$0	<b>\$7,099,407</b>	\$7,386,735	\$0	\$0	<b>\$7,386,735</b>
Office of the Executive Secretariat, Privacy, and Information Management	\$1,537,804	\$0	\$4,914,799	<b>\$6,452,603</b>	\$1,572,258	\$114,466	\$5,374,369	<b>\$7,061,093</b>
Office of the General Counsel	\$367,544	\$0	\$8,613,227	<b>\$8,980,771</b>	\$0	\$380,977	\$9,018,654	<b>\$9,399,631</b>
OPM Human Resources	\$1,031,726	\$0	\$12,730,165	<b>\$13,761,891</b>	\$565,227	\$657,309	\$13,260,986	<b>\$14,483,522</b>
Rent	\$11,268,333	\$12,441,000	\$0	<b>\$23,709,333</b>	\$11,568,319	\$14,705,964	\$0	<b>\$26,274,283</b>
Retirement Services	\$6,076,614	\$76,458,752	\$0	<b>\$82,535,366</b>	\$0	\$86,024,967	\$0	<b>\$86,024,967</b>
Security, Suitability and Credentialing Line of Business (SSCLOB)	\$551,000	\$0	\$0	<b>\$551,000</b>	\$543,000	\$0	\$0	<b>\$543,000</b>
White House Fellows	\$1,105,031	\$0	\$0	<b>\$1,105,031</b>	\$1,137,768	\$0	\$0	<b>\$1,137,768</b>

Organizations	FY 2024 Annualized CR				FY 2025 CBJ			
	Salaries and Expenses	Trust Fund Annual	Common Services	OPM Total	Salaries and Expenses	Trust Fund Annual	Common Services	OPM Total
Workforce Policy and Innovation	\$41,273,279	\$0	\$0	\$41,273,279	\$48,258,074	\$0	\$0	\$48,258,074
<b>OPM Sub Total</b>	<b>\$189,421,418</b>	<b>\$143,466,630</b>	<b>\$123,423,436</b>	<b>\$456,311,484</b>	<b>\$165,076,851</b>	<b>\$209,071,851</b>	<b>\$154,964,123</b>	<b>\$529,112,825</b>
Appropriated Contribution to Common Services	\$29,654,582	\$51,457,370	\$0		\$40,160,149	\$51,491,149	\$0	
Non-Appropriated Contribution to Common Services								
				<b>(\$42,311,484)</b>				<b>(\$63,312,825)</b>
	<b>\$219,076,000</b>	<b>\$194,924,000</b>	<b>\$123,423,436</b>	<b>\$414,000,000</b>	<b>\$205,237,000</b>	<b>\$260,563,000</b>	<b>\$154,964,123</b>	<b>\$465,800,000</b>

\*The budgets for several programs in the table above have changed in FY 2023 due to planned organizational consolidations.



## FY 2025 Budget Request by Strategic Goals

OPM’s FY 2022-2026 strategic plan includes four key goals that focus on improving OPM’s ability to deliver on its mission. As required by the Government Performance and Results Modernization Act of 2010 (P.L. 111-352), OPM’s budget request maps to its strategic plan.

The Performance Budget by Strategic Goal section of this document describes each strategic goal and the resources budgeted for each objective in FY 2025. The following table displays OPM’s planned resource allocation for each strategic goal, excluding Revolving Fund program activities.

### OPM Budget FY 2025 by Strategic Goal — Discretionary Resources

STRATEGIC GOAL	FY 2025 CBJ	
	Dollars	FTE
<b>1 - Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points</b>	\$25,538,138	103.5
<b>2 - Transform OPM’s organizational capacity and capability to better serve as the leader in Federal human capital management</b>	\$121,074,272	122.0
<b>3 - Create a human-centered customer experience by putting the needs of OPM’s customers at the center of OPM’s workforce services, policy, and oversight, increasing OPM’s customer satisfaction index score for targeted services to 4.3 out of 5</b>	\$108,259,749	642.1
<b>4 - Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points</b>	\$16,479,710	60.6
<b>5 - Additional Mission and Mission Support Activities</b>	\$257,760,955	807.6
	<b>\$529,112,825</b>	<b>1,735.8</b>
Non-Appropriated Contribution to Common Services	<b>(\$63,312,825)</b>	
<b>OPM Total</b>	<b>\$465,800,000</b>	<b>1,735.8</b>

## FY 2024-2025 Agency Priority Goals

Agency Priority Goals (APGs) reflect the top performance improvement priorities of agency leadership and the Administration. APGs reflect measurable results that leadership plans to accomplish over a two-year period, advancing progress toward longer-term strategic goals and objectives in the agency's strategic plan.

The Federal Government uses a three-pronged approach to manage APGs: 1) public goal setting; 2) data-driven performance review meetings with agency leadership no less than quarterly; and 3) quarterly public updates on [www.Performance.gov](http://www.Performance.gov). For additional information on APGs, please refer to [www.Performance.gov](http://www.Performance.gov).

For FY 2024-2025, OPM developed four APGs.

**1. Position the Federal Government as the employer of choice for military and veteran spouses and early career talent.** By September 30, 2025, strengthen agencies' ability to develop, promote, and retain this skilled and diverse pool of talent, capitalizing on existing and new workplace flexibilities to increase the Employee Engagement Index score for military and veteran spouses by 2 points and early career employees by 4 points, as compared to a FY 2023 baseline.

Related Strategic Objective: 1.3 - Build the skills of the Federal workforce through hiring and training. By FY 2026, increase the government-wide percentage of respondents who agree that their work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals by 4 points.

**2. Streamline the hiring experience for applicants to Federal jobs, agency hiring managers, and agency HR professionals through the use of pooled/shared hiring actions.** By September 30, 2025, lead or facilitate 28 pooled/shared hiring actions for agencies to fill critical vacancies resulting in 700 agency hires.

Related Strategic Objective: 1.3 - Build the skills of the Federal workforce through hiring and training. By FY 2026, increase the government-wide percentage of respondents who agree that their work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals by 4 points.

**3. Enable critical human capital decision-making for Federal agencies and employees by developing an enterprise human capital analytics platform and delivering high-quality workforce planning data analytics products Government-wide.** By September 30, 2025, increase the percentage of Chief Human Capital Officers (CHCOs) who agree that OPM provides

agencies with high-quality workforce data and information for decision-making by 25 percentage points, as compared to a FY 2023 baseline, and improve employee satisfaction in their ability to access their own data on benefits and personnel actions by 25 percentage points, as compared to a FY 2024 baseline.

Related Strategic Objective: 4.3 - Expand the quality and use of OPM's federal human capital data. By FY 2026, increase the percentage of CHCO survey respondents who agree that OPM provides agencies with high quality workforce data and information to be used in decision-making by 20 percentage points.

**4. Strengthen the health insurance enrollment experience by establishing a state-of-the-art Postal Service Health Benefits System for Postal Service employees, annuitants, and their eligible family members.** By September 30, 2025, develop a new, centralized enrollment system including a Decision Support Tool and perform an evaluation to assess implementation of the centralized enrollment system and Decision Support Tool.

# President's Management Agenda

## Contributions to Cross-Agency Priority Goals

OPM plays a leading role in advancing the President's Management Agenda Priority 1 to strengthen and empower the Federal workforce and also contributes to Priority 2 to deliver excellent, equitable, and secure Federal services and customer experience.

Per the Government Performance and Results Modernization Act of 2010 requirement to address cross-agency priority goals in the agency strategic plan, the Annual Performance Plan, and the Annual Performance Report, please refer to <http://www.Performance.gov> for OPM's contributions to those goals and progress, where applicable.



## Legislative Proposals

OPM prepares various legislative proposals during the preparation of its annual budget request, which align with its strategic goals and objectives. OPM designs these proposals to enhance and improve its programs, increase efficiencies in executing these programs, and reduce overall costs for the Government.

The FY 2025 legislative proposals for OPM are:

- Reimbursement for Corrections and Permanent Authority Regarding Voluntary Early Retirement Authority (VERA) or Voluntary Separation Incentive Payment (VSIP) Related Retirement Processing Costs;
- Establish OPM Trust Fund Authority for PSHB and FEHB Enrollment Systems
- Demonstration Project Authority;
- Human Resource Workforce Proposal;
- Improve Financial Management of Tribal FEHB Administrative Fee by Treating as Mandatory Authority;
- Expand Family Member Eligibility Under FEDVIP;
- Expand FEDVIP to Certain Tribal Employers;
- Expand FEHB to Tribal Colleges and Universities;
- Preempt State/Local Taxation of FEDVIP Carriers to Align with FEHB Carriers;
- Shorten FEDVIP Contract Terms to Allow Flexibility for New Carriers;
- Require Coverage of Three Primary Care Visits and Three Behavioral Health Visits Without Cost-Sharing;
- Limit Cost-Sharing for Insulin at \$35 per Month

### Reimbursement for Corrections and Permanent Authority Regarding VERA/VSIP Processing Costs

Makes the annual statutory provisions that require agencies to remit the case processing cost for any retirement applications resulting from Federal agencies' utilization of Voluntary Early Retirement Authorities (VERA) or in conjunction with Voluntary Separation Incentive Payments permanent (VSIP), and amends Title 5 to provide that when agencies submit certain corrections to retirement records for retired former employees, they include payment of the case processing cost to help cover the administrative cost of recalculating the annuity benefit.

## Establish OPM Trust Fund Authority for PSHB and FEHB Enrollment Systems

Beginning in FY 2026, this proposal would allow OPM to access a capped amount of mandatory funding annually from the Employees Health Benefits Fund to develop and maintain eligibility and enrollment systems for PSHB and FEHB. The cap would start at \$37 million in 2026 and gradually increase, for a 10-year cost of \$474 million. This proposal would provide consistent, stable funding for continued operation of the PSHB eligibility and enrollment system and potential expansion to FEHB.

## Demonstration Project Authority

This proposal would amend OPM's current statutory authority to conduct and evaluate demonstration projects enterprise-wide. This would enhance the ability of OPM and employing agencies to conduct pilot programs by expanding the scope of activities that could be considered. By providing greater flexibility and a better approach to assess outcomes, OPM would be better positioned to promote innovation and learning.

## Human Resource Workforce Proposal

This proposal would amend Title 5 to provide OPM statutory authority over strategic workforce analysis and development for the Federal Human Resources (HR) workforce. Although the need to improve strategic human capital management has been cited repeatedly by the Government Accountability Office (GAO) as a high risk to Federal operations, to date Federal HR workforce development has not received prioritization and resourcing commensurate with their critical value to hire, retain, develop and engage a high-quality workforce for the rest of government. Following the successful precedent set to address skills gaps in the Federal Acquisitions workforce, OPM seeks the ability to carry out government-wide, coordinated activities to build the capacity and capabilities of the Federal HR workforce.

## Improve Financial Management of Tribal FEHB Administrative Fee by Treating as Mandatory Authority

This proposal would provide OPM with direct access to the administrative fee collected for the Tribal FEHB Program as mandatory authority. The fee, which is currently collected from Tribes for participation in the FEHB Program (up to 3 percent of monthly premiums or about \$6 per-member-per-month), is not available to OPM outside of the discretionary appropriation for administrative expenses under current statute. The funds would be used for Tribal FEHB-related

administrative expenses and system enhancements. These funds would be available to OPM without fiscal year limitation. This proposal would increase FEHB-related administrative costs by \$20 million over 10 years.

### **Expand Family Member Eligibility Under FEDVIP**

This proposal would amend the definition of a “member of family” under chapters 5 U.S.C 8901 to include persons up to 26 years of age. This expansion in eligibility for adult children will align coverage of dental and vision benefits with medical benefits, which were expanded up to age 26 through the Affordable Care Act.

### **Expand FEDVIP to Certain Tribal Employers**

This proposal would amend Section 409 of the Indian Health Care Improvement Act (IHCIA), 25 U.S.C. 1647b, to expand entitlement to purchase FEDVIP coverage to tribes and tribal organizations carrying out programs under the Indian Self-Determination and Education Assistance Act (25 U.S.C. 5301 et seq.), the Tribally Controlled Schools Act of 1988 (25 U.S.C. 2501, et seq.), tribal colleges and universities defined by the Higher Education Act of 1965, and urban Indian organizations carrying out programs under subchapter IV of chapter 18 of title 25.

### **Expand FEHB to Tribal Colleges and Universities**

This proposal would amend Section 409 of the Indian Health Care Improvement Act to expand FEHB eligibility to employees of Tribal colleges and universities (TCUs) that are overseen through the Bureau of Indian Education (BIE) under the Higher Education Act of 1965. There are 33 TCUs overseen by BIE, which are anticipated to increase FEHB enrollment by approximately 3,600. This proposal is not anticipated to impact FEHB premiums. There is no Federal budgetary impact of this proposal.

### **Preempt State/Local Taxation of FEDVIP Carriers to Align with FEHB Carriers**

This proposal would add specific legislative language — consistent with OPM’s current interpretation— to the FEDVIP dental and vision benefit preemption statutes to further clarify that no tax, fee, or other monetary payment may be imposed on a qualified company (often referred to as a “FEDVIP carrier”) offering dental or vision benefits under the FEDVIP by any State, the District of Columbia, the Commonwealth of Puerto Rico, or any territory of the United States, or by any political subdivision or other Governmental authority thereof. It would



clarify the statutory preemption and would ensure that no taxes, fees, or monetary assessments could be imposed on FEDVIP carriers. This proposal would maintain consistency across all OPM-administered insurance benefit programs which include similar preemption language.

### **Shorten FEDVIP Contract Terms to Allow Flexibility for New Carriers**

The proposal would allow OPM greater flexibility to negotiate and, if necessary, enter into contract terms of a defined duration but not one dictated by a certain contract term. The amendments clarify that OPM can enter into contracts with dental and vision Carriers of at least one year that can automatically be renewed, which provides more flexibility than the current 7-year contract term. There is no Government contribution to FEDVIP enrollee premiums, so there is no direct Government cost for FEDVIP for this proposal.

### **Require Coverage of Three Primary Care Visits and Three Behavioral Health Visits Without Cost-Sharing**

Beginning in plan year 2027, this proposal would require all plans and issuers, including FEHB carriers, to cover three primary care visits and three behavioral health visits each year without charging a copayment, coinsurance, or deductible-related fee. For High Deductible Health Plans, these services would be considered pre-deductible for meeting Health Savings Account requirements. This proposal would increase FEHB premiums by approximately 0.9 percent.

### **Limit Cost-Sharing for Insulin at \$35 per Month**

The Inflation Reduction Act limits Medicare beneficiary cost-sharing to \$35 per covered insulin product for a month's supply. Beginning in plan year 2025, this proposal would extend the cap on patient cost-sharing to insulin products in commercial markets, including FEHB. This proposal would increase FEHB premiums by approximately 0.1 percent.

## Postal Service Health Benefits (PSHB) Program

The Postal Service Reform Act of 2022 (PSRA, Pub. L. 117-108) requires OPM to establish and administer the PSHB Program, a new health benefits program for approximately 1.9 million United States Postal Service (USPS) employees, annuitants, and their eligible family members that will replace their Federal Employees Health Benefits (FEHB) Program coverage. The PSRA mandates that the PSHB Program begin coverage starting in January 2025.

Though situated within the broader FEHB Program, the PSHB Program is a separate health insurance benefit, with separate carrier contracts, plan options, and enrollment prerequisites. Critically different from FEHB, the PSHB Program requires stronger coordination with Medicare and verifying the Medicare enrollment eligible of PSHB Program enrollees. For example, if a postal annuitant who is required to be enrolled in Medicare Part B is not enrolled or disenrolls, they are no longer eligible to be enrolled in the PSHB Program. To meet this requirement, OPM must routinely accept and integrate Medicare eligibility information for enrollees and confirm PSHB Program eligibility (including exceptions to the Medicare Part B requirement) with a number of stakeholder agencies, including exchanging data with the Social Security Administration (SSA), Department of Veterans Affairs (VA), Department of Labor Office of Workers Compensation (DOL), OPM Retirement Services (RS), and, of course, USPS. This integration is unique among employer-based health insurance programs.

OPM remains committed to collaborating with these partner agencies to develop and manage a PSHB Program that is the most advanced health insurance exchange available in the U.S. healthcare marketplace and delivers better customer experience and significantly improved oversight. When successfully implemented, the PSHB Program will see:

- robust participation by health plans offering innovative, affordable, high-quality benefits;
- accurate and efficient enrollment and payment processing that generates savings by removing ineligible persons and addressing other enrollment discrepancies; and,
- superior enrollee satisfaction with the health benefits selection process and their chosen health plan.

The PSRA appropriated \$70.5 million in no-year funds to OPM for start-up costs associated with the PSHB Program implementation. Using a minimum viable product (MVP) strategy and agile delivery, the start-up costs include development and deployment of new systems which centralize enrollment and eligibility determination, significantly improve tools enabling enrollee

plan selection decision-making, and automate numerous processes (previously entirely manual and paper-driven) with the carriers, and integrate current systems with the new ones including those supporting Retirement Services and those processing financial obligations. In addition to technology, the implementation funding addressed program management and oversight requirements, along with FTEs that support both the implementation and administration of a new benefits program. Further, funding addressed requirements development of financial system configurations needed for the Employees Health Benefits Fund and Postal Service Retiree Health Benefits Fund to separately account for the new PSHB Program within the Employees Health Benefits Fund. OPM has sought additional appropriations for FY 2024 to support the continuation of the development of the PSHB Program and the launch of the initial plan year. Specific activities included: hiring dedicated personnel; funding outreach and communications, ongoing project management support, cyber security expenses, licenses, and the Open Season contract supporting annuitants; and, covering maintenance agreement costs for relevant OPM systems.

This FY 2025 budget continues the appropriation increase from 2024, and requests to include the resources to operate the PSHB Program within OPM's limitation on Trust Fund Transfers instead of our Salaries and Expenses appropriation. The budget also includes a legislative proposal to finance the continued operation of eligibility determination and enrollment systems critical to the PSHB Program in FY 2026 and beyond via mandatory authority within dollar limits defined in the proposal. The surety of mandatory authority provides for system refinements and potential expansion to the entire FEHB Program.

## Appropriations Language

### Salaries and expenses (including transfer of trust funds)

For necessary expenses to carry out functions of the Office of Personnel Management (OPM) pursuant to Reorganization Plan Numbered 2 of 1978 and the Civil Service Reform Act of 1978, including services as authorized by 5 U.S.C. 3109; medical examinations performed for veterans by private physicians on a fee basis; rental of conference rooms in the District of Columbia and elsewhere; hire of passenger motor vehicles; not to exceed \$2,500 for official reception and representation expenses; and payment of per diem and/or subsistence allowances to employees where Voting Rights Act activities require an employee to remain overnight at his or her post of duty, \$205,237,000: Provided, That of the total amount made available under this heading, \$10,710,000 shall remain available until expended, for information technology modernization, and shall be in addition to funds otherwise made available for such purposes: *Provided further*, That of the total amount made available under this heading, \$1,445,000 may be made available for strengthening the capacity and capabilities of the acquisition workforce (as defined by the Office of Federal Procurement Policy Act, as amended (41 U.S.C. 4001 et seq.)), including the recruitment, hiring, training, and retention of such workforce and information technology in support of acquisition workforce effectiveness or for management solutions to improve acquisition management; and in addition \$260,563,000 for administrative expenses, to be transferred from the appropriate trust funds of OPM without regard to other statutes, including direct procurement of printed materials, for the retirement and insurance programs: *Provided further*, That the provisions of this appropriation shall not affect the authority to use applicable trust funds as provided by sections 8348(a)(1)(B), 8958(f)(2)(A), 8988(f)(2)(A), and 9004(f)(2)(A) of title 5, United States Code: *Provided further*, That no part of this appropriation shall be available for salaries and expenses of the Legal Examining Unit of OPM established pursuant to Executive Order No. 9358 of July 1, 1943, or any successor unit of like purpose: *Provided further*, That the President's Commission on White House Fellows, established by Executive Order No. 11183 of October 3, 1964, may, during fiscal year 2025, accept donations of money, property, and personal services: *Provided further*, That such donations, including those from prior years, may be used for the development of publicity materials to provide information about the White House Fellows, except that no such donations shall be accepted for travel or reimbursement of travel expenses, or for the salaries of employees of such Commission: *Provided further*, That not to exceed 5 percent of amounts made available under this heading may be transferred to an information technology working

capital fund established for purposes authorized by subtitle G of title X of division A of the National Defense Authorization Act for Fiscal Year 2018 (Public Law 115–91; 40 U.S.C. 11301 note): *Provided further*, That the OPM Director shall notify the Committees on Appropriations of the House of Representatives and the Senate at least 15 days in advance of any transfer under the preceding proviso: *Provided further*, That amounts transferred to such a fund under such transfer authority from any organizational category of OPM shall not exceed 5 percent of each such organizational category's budget as identified in the report required by section 608 of this Act: *Provided further*, That amounts transferred to such a fund shall remain available for obligation through September 30, 2028. *Note.*—*A full-year 2024 appropriation for this account was not enacted at the time the Budget was prepared; therefore, the Budget assumes this account is operating under the Continuing Appropriations Act, 2024 and Other Extensions Act (Division A of Public Law 118–15, as amended). The amounts included for 2024 reflect the annualized level provided by the continuing resolution.*

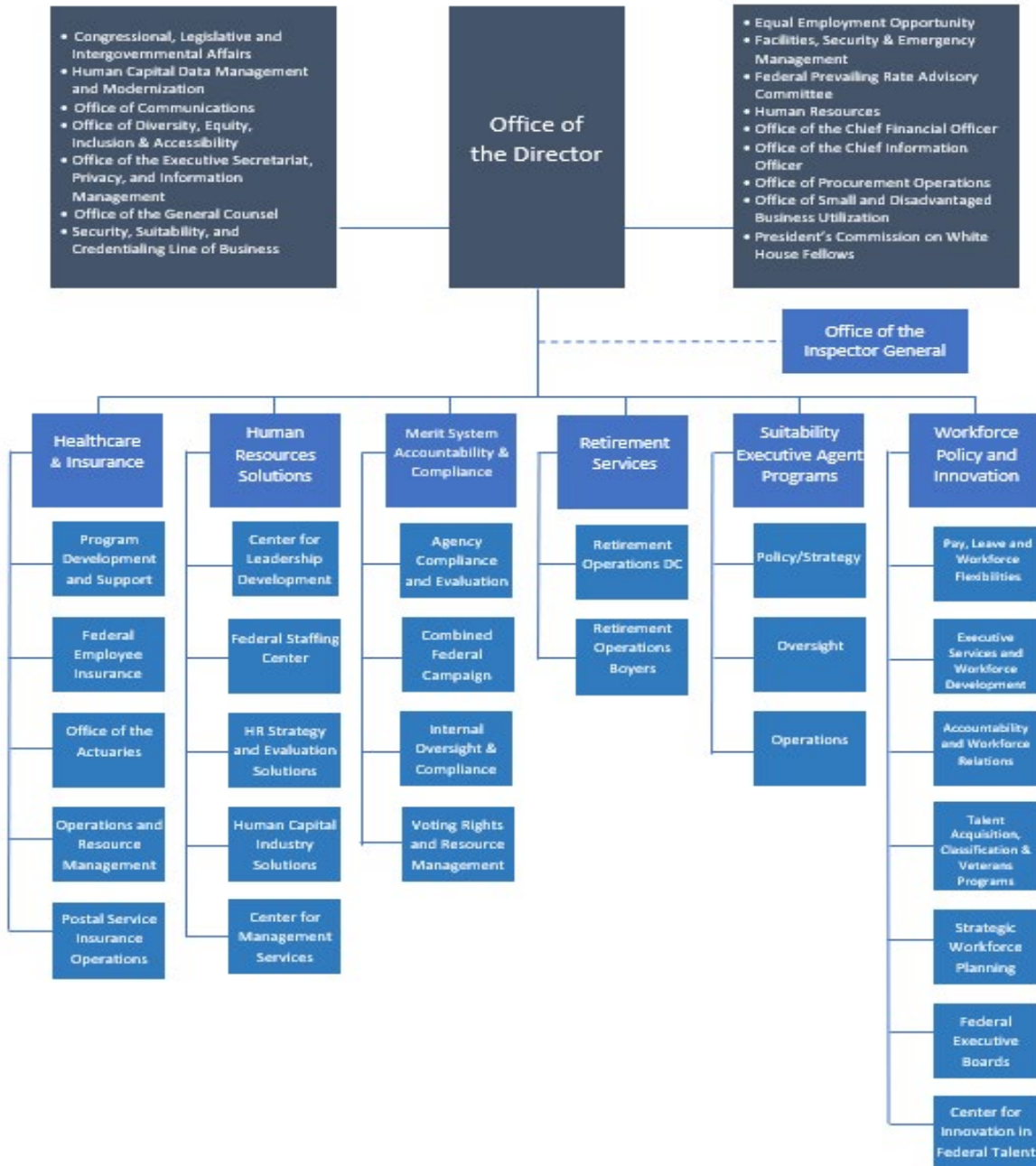
## Office of Inspector General

### Salaries and expenses (including transfer of trust funds)

For necessary expenses of the Office of Inspector General in carrying out the provisions of the Inspector General Act of 1978, including services as authorized by 5 U.S.C. 3109, hire of passenger motor vehicles, \$7,144,000, and in addition, not to exceed \$35,556,000 for administrative expenses to audit, investigate, and provide other oversight of the Office of Personnel Management's retirement and insurance programs, to be transferred from the appropriate trust funds of the Office of Personnel Management, as determined by the Inspector General: *Provided*, That the Inspector General is authorized to rent conference rooms in the District of Columbia and elsewhere. *Note.*—*A full-year 2024 appropriation for this account was not enacted at the time the Budget was prepared; therefore, the Budget assumes this account is operating under the Continuing Appropriations Act, 2024 and Other Extensions Act (Division A of Public Law 118–15, as amended). The amounts included for 2024 reflect the annualized level provided by the continuing resolution.*

# Organizational Framework

OPM’s divisions and offices and their employees implement the programs and deliver the services that enable the agency to meet its strategic goals and fulfill its statutory mandates. The agency’s organizational framework consists of program divisions and offices that directly and indirectly support the agency’s mission.



OPM Budget FY 2024 & FY 2025 by Organization — All Resources

Organization	FY 2024 Annualized CR		FY 2025 CBJ		Variance	
	Dollars	FTE	Dollars	FTE	Dollars	FTE
Centrally Funded Items	\$3,815,512	1.0	\$5,133,956	1.0	\$1,318,444	0.0
Chief Human Capital Officer Council	\$845,000	4.0	\$0	0.0	(\$845,000)	(4.0)
Congressional, Legislative and Intergovernmental Affairs	\$3,358,112	18.0	\$3,515,031	17.0	\$156,919	(1.0)
Equal Employment Opportunity	\$1,172,975	6.3	\$1,238,025	7.0	\$65,050	0.8
Facilities, Security & Emergency Management	\$16,585,060	84.2	\$17,541,666	89.0	\$956,607	4.8
Federal Prevailing Rate Advisory Committee	\$176,000	0.5	\$179,520	1.0	\$3,520	0.5
Healthcare & Insurance	\$65,550,954	244.9	\$73,323,367	255.6	\$7,772,413	10.7
HR Solutions	\$383,238,719	527.0	\$433,654,876	607.0	\$50,416,157	80.0
Human Capital Data Management and Modernization	\$55,559,499	66.8	\$55,346,668	71.0	(\$212,831)	4.2
Merit System Accountability & Compliance	\$17,013,292	91.8	\$17,660,752	92.0	\$647,460	0.2
Office of Communications	\$3,477,557	18.5	\$3,558,650	17.0	\$81,093	(1.5)
Office of Diversity, Equity, Inclusion and Accessibility	\$5,279,224	15.0	\$5,454,570	15.0	\$175,346	0.0
Office of Procurement Operations	\$7,589,981	33.8	\$7,908,207	36.5	\$318,226	2.8
Office of Small and Disadvantaged Business Utilization	\$523,739	2.0	\$557,764	2.0	\$34,025	0.0
Office of the Chief Financial Officer	\$138,441,523	109.3	\$145,056,198	118.3	\$6,614,675	8.9
Office of the Chief Information Officer	\$271,778,383	338.0	\$276,990,760	320.8	\$5,212,376	(17.2)
Office of the Director	\$7,099,407	29.0	\$8,348,395	33.0	\$1,248,988	4.0
Office of the Executive Secretariat, Privacy, and Information Management	\$6,452,603	18.9	\$7,061,093	22.0	\$608,490	3.2

Organization	FY 2024 Annualized CR		FY 2025 CBJ		Variance	
	Dollars	FTE	Dollars	FTE	Dollars	FTE
Office of the General Counsel	\$8,980,771	39.0	\$9,399,631	41.0	\$418,860	2.1
Office of the Inspector General	\$36,395,000	155.1	\$42,700,000	183.1	\$6,305,000	27.9
OPM Human Resources	\$13,761,891	63.3	\$14,483,522	64.0	\$721,631	0.8
Rent	\$24,712,685	0.0	\$27,338,283	0.0	\$2,625,598	0.0
Retirement Services	\$146,851,947	1,028.1	\$155,073,139	1,033.1	\$8,221,192	5.0
Security, Suitability and Credentialing Line of Business (SSCLOB)	\$8,193,000	10.0	\$8,146,000	11.0	(\$47,000)	1.0
Suitability Executive Agent Programs	\$11,346,637	59.0	\$11,732,689	59.0	\$386,052	0.0
White House Fellows	\$1,105,031	4.0	\$1,137,768	3.0	\$32,737	(1.0)
Workforce Policy and Innovation	\$54,773,279	225.8	\$67,758,074	253.0	\$12,984,795	27.2
<b>OPM Total</b>	<b>\$1,294,077,781</b>	<b>3,193.2</b>	<b>\$1,400,298,604</b>	<b>3,352.4</b>	<b>\$106,220,823</b>	<b>159.2</b>

Note: This table includes organizations financed by revolving funds, common services, and Advances & Reimbursements. Therefore, this table varies from the tables in the Executive Summary section.

## Executive Offices

**Office of the Director (OD)** provides guidance, leadership, and direction necessary to achieve OPM’s mission to lead and serve the Federal Government by delivering policies and services to achieve a trusted, effective civilian workforce.

**Congressional, Legislative and Intergovernmental Affairs (CLIA)** is the OPM office that fosters and maintains relationships with Members of Congress and their staff. CLIA accomplishes its mission by keeping informed of issues related to programs and policies administered by OPM. CLIA staff attend meetings, briefings, markups, and hearings to interact, educate, and advise agency leadership and the Congress. CLIA is also responsible for supporting congressional efforts by providing technical assistance and substantive responses to congressional inquiries.

**Human Capital Data Management and Modernization (HCDMM)** leads the Government-wide use of human capital data as a strategic asset through innovations in human capital service delivery models, interoperable data management, and decision-support analytics and tools.

HCDMM establishes human capital data standards and manages data collection processes including the Federal guides for working with and managing human capital data, requirements



for data file submissions to OPM, protocols for human capital data releases, statistical analyses, data science, product development, and delivery of analytical tools and services.

HCDMM includes the Human Resource Quality Services Management Office, which is establishing a marketplace of services and products that enables agencies to improve the delivery of human capital activities in alignment with OPM's human capital data standards.

**Office of Communications (OC)** coordinates a comprehensive effort to inform the public of the Administration's and OPM's goals, plans, and activities through various media outlets. The OC provides the American public, Federal agencies, and pertinent stakeholders with accurate information to aid in planning and decision-making. The OC supports enterprise-wide digital transformation initiatives and oversees the development of all video products, printed materials, and web content generated by OPM offices. The office develops briefing materials for the Director and other OPM officials for various activities and events. The OC also plans events that amplify the Administration's and OPM's agency and Government-wide initiatives.

**Office of Diversity, Equity, Inclusion & Accessibility (ODEIA)** is committed to leading and providing Government-wide guidance on DEIA initiatives, including technical assistance to agencies, policy guidance, management of intergovernmental working groups on DEIA, and the Government-wide DEIA Strategic Plan. ODEIA provides Federal agencies with concrete strategies and leading practices to recruit, hire, include, develop, retain, engage, and motivate a diverse, high-performing workforce. ODEIA primarily focuses its actions on externally facing customers and matters, but it also has an advisory function to senior leaders for internal OPM DEIA efforts.

**Office of the Executive Secretariat, Privacy, and Information Management (OESPIM)** was established to combine the complementary functions of the Office of Privacy and Information Management (OPIM) and the Executive Secretariat (OES), which had previously been in the Office of the Director. OESPIM, led by a Senior Executive Service Executive Director, is responsible for privacy, Freedom of Information Act, records management, forms management/Paperwork Reduction Act, Controlled Unclassified Information, correspondence management, coordination of OPM's internal clearance processes (to include policy and program proposals), and regulatory affairs (to include serving as the agency's liaison with the Office of Management and Budget and the Federal Register).

**Office of the General Counsel (OGC)** provides legal advice and representation to the Director and OPM managers and leaders. OGC does this by rendering opinions, reviewing proposed policies and other work products, commenting on their legal efficacy, serving as agency

representatives in administrative litigation, and supporting the Department of Justice in its representation of the Government on matters concerning the civilian workforce. OGC also carries out several programmatic, substantive functions that fulfill other statutory or regulatory mandates and, thus, benefit other OPM offices or the Executive Branch as a whole. For example, OGC is responsible for promulgating Hatch Act regulations, administers the internal agency Hatch Act and ethics programs, and serves in a policy and legal role in the Government-wide function of determining which Merit Systems Protection Board and arbitral decisions are erroneous and have a substantial impact on civil service law, and, thus, merit judicial review. Consistent with the Government in Ethics Act, OGC, along with the Department of Justice, consults with the United States Office of Government Ethics on any regulations related to the Standards of Conduct the Office of Government Ethics plans to issue. OGC also administers OPM's internal program for handling claims lodged under the Federal Tort Claims Act and other statutes and determines when OPM personnel or documents should be made available in discovery to parties in litigation to which OPM is not a party.

**Security, Suitability, and Credentialing Line of Business (SSLOB)** is an interagency organization that is administratively housed within OPM. The Security, Suitability, and Credentialing Line of Business supports the Security, Suitability, and Credentialing Performance Accountability Council, including the Suitability and Credentialing and Security Executive Agents (the Director of OPM and the Director of National Intelligence). OMB's Deputy Director for Management chairs the Council and is accountable to the President for promoting the alignment of personnel vetting processes and driving enterprise-wide reforms. The Security, Suitability, and Credentialing Line of Business assists the Council and the Executive Agents – through the Council's Program Management Office – in its personnel vetting mission by identifying/implementing investments, simplifying the delivery of services, and establishing shared services, as well as promoting reciprocity, efficiency, and effectiveness across the enterprise.

## Management Offices

**Equal Employment Opportunity (EEO)** provides a fair, legally correct, and expeditious Equal Employment Opportunity complaints process, including Equal Employment Opportunity counseling, Alternative Dispute Resolution, and Equal Employment Opportunity Complaints Intake, Investigation, Adjudication, and Record-Keeping.

**Facilities, Security and Emergency Management (FSEM)** manages the agency's real property, building operations, space design and layout, mail management, physical security and safety,

and occupational health programs. FSEM provides personnel security, suitability, and national security adjudicative determinations for OPM personnel. FSEM oversees OPM's Personal Identification Verification program and provides shared services in support of other Government agencies' adjudicative programs. FSEM directs the operations and oversees OPM's classified information, industrial security, insider threat, and preparedness and emergency response programs. In addition, it oversees publishing and printing management for internal and external design and reproduction, as well as the agency's mail center operations.

**OPM Human Resources (HR)** is responsible for OPM's internal human resources management programs. OPM HR supports the human capital needs of program offices throughout the employment lifecycle, from recruiting and hiring candidates for employment opportunities at OPM, to coordinating career development opportunities, to processing retirement applications. The OPM Chief Human Capital Officer (CHCO) leads HR and is responsible for shaping corporate human resources strategy, policy, and solutions to workforce management challenges within the agency.

**Office of the Chief Financial Officer (OCFO)** is responsible for OPM's strategic financial management, fiscal responsibility, transparency, and accountability. OCFO advises the OPM Director and senior leadership on all aspects of financial management and delivers services to OPM customers, enabling OPM to achieve its strategic plan objectives and deliver on its mission. OCFO facilitates financial planning, budgeting, and accounting functions, ensuring adherence to financial regulations and compliance standards. OCFO also assesses organizational performance management through research and evaluation, manages the agency's financial systems, conducts comprehensive enterprise risk assessments, and performs internal control reviews. OCFO aligns financial decisions with the agency's goals and decision-making processes, optimizing resource allocations and showcasing the effective management of taxpayer dollars. OCFO strives for excellence in strategic financial management, leading OPM with the practice of sound financial management in program development and operations and the stewardship of public resources.

**Office of the Chief Information Officer (OCIO)** defines the enterprise information technology (IT) vision, strategy, policies, and cybersecurity for OPM. The OCIO determines the most effective use of technology to support of the agency's strategic plan, including the enterprise architecture, platform, systems, and applications. The OCIO is responsible for modernizing information technology, developing and maintaining the agency's information technology security policies, and operating and enhancing the agency's cybersecurity program. The OCIO leads the IT governance processes and IT investment management to develop IT strategies and

budgets across the agency. The OCIO provides technical strategies and guidance, cloud technology and services, application and system development and maintenance, IT project management, agile frameworks, collaboration and communication tools, hardware, software, and infrastructure such as the OPM Help Desk services to support OPM's business operations. The OCIO manages pre- and post-implementation reviews of information technology programs and projects. The OCIO reviews and oversees IT acquisitions, services, and spending. Additionally, the OCIO partners with other agencies on Government-wide initiatives such as IT modernization, the optimization of enterprise services, and the development of long-term plans for human resource IT strategies.

**Office of Procurement Operations (OPO)** awards and administers contracts and interagency agreements. OPO provides acquisition services to OPM's programs and provides assisted acquisition services for other Federal agencies that require support under OPM contracts. OPO is responsible for the agency suspension and debarment program and supports OPM's small business utilization efforts in accordance with law and OPM contracting policies. The Acquisition Policy and Innovation function within OPO provides acquisition policy development and guidance agency-wide, as well as compliance and oversight for OPM's procurement program. OPO provides acquisition support and oversight for all Contracting Officers and Contracting Officer's Representatives and manages and oversees the agency purchase card program. OPO serves as OPM's liaison to the Office of Federal Procurement Policy, Chief Acquisition Officers Council, and other key external agency partnerships.

**Office of Small and Disadvantaged Business Utilization (OSDBU)** is authorized by the Small Business Act (Act) to oversee OPM's compliance with the achievement of annual small business goals. The Office of Small and Disadvantaged Business Utilization manages the development and implementation of appropriate outreach programs aimed at heightening the awareness of the small business community to the contracting opportunities available within OPM. The Act also directs the Office of Small and Disadvantaged Business Utilization to manage its in-reach and outreach activities under three lines of business: advocacy, outreach, and unification of the business process.

## Other Offices

**Federal Prevailing Rate Advisory Committee (FRAC)** studies the prevailing rate system and other matters pertinent to the establishment of prevailing rates under Subchapter IV of Chapter 53 of Title V, United States Code, and advises the Director of OPM on the Government-wide administration of the pay system for blue-collar Federal employees.

**Office of the Inspector General (OIG)** is the independent office that conducts comprehensive audits, investigations, and evaluations relating to OPM programs and operations. It is responsible for administrative actions against health care providers that commit sanctionable offenses with respect to the FEHB Program or other OPM programs. The Office of the Inspector General keeps the Director and Congress fully informed about problems and deficiencies in the administration of agency programs and operations, and the need for and progress of corrective action.

**President’s Commission on White House Fellows** was founded in 1964 and is one of America’s most prestigious programs for leadership and public service. White House Fellowships offer exceptional young professionals firsthand experience working at the highest levels of the Federal Government. Selected individuals typically spend one year working as a full-time, paid Fellow to senior White House staff, Cabinet Secretaries, and other top-ranking Government officials. Fellows also participate in an education program consisting of roundtable discussions with renowned leaders from the private and public sectors. Fellowships are awarded on a strictly nonpartisan basis.

## Program Offices

**Healthcare and Insurance (HI)** consolidates OPM’s healthcare and insurance benefits responsibilities into a single organization. This includes contracting, contracting oversight, program development, and management functions for the Federal Employees Health Benefits (FEHB) Program, the Federal Employees’ Group Life Insurance Program, the Federal Long-Term Care Insurance Program, the Federal Employees Dental and Vision Insurance Program, and the Federal Flexible Spending Account Program. HI consists of Program Development and Support, Federal Employees Insurance Operations, Postal Service Insurance Operations, Office of the Actuaries and Operations, Resource Management divisions, and front office staff, including the Chief Pharmacy Officer and the Chief Medical Officer.

Program Development and Support is responsible for extensive operational, analytical, and systems development and support; policy and program development and implementation; data collection and analysis; and stakeholder outreach and education for programs administered by HI. Program Development and Support also manages the annual Federal Benefits Open Season.

Federal Employees Insurance Operations (FEIO) is responsible for the contracting operations for all insurance programs, the Plan Performance Assessment function connecting health plan quality to carrier profit, the Audit Resolution & Compliance function facilitating and tracking audit responses and resolution, and the Contract Administration and Program Support

responsible for leading projects important to insurance operations, including carrier brochure changes and contract amendments.

Postal Service Insurance Operations will perform similar functions to FEIO for the new Postal Service Health Benefits Program. The Office of the Actuaries reviews premium proposals from FEHB and Federal Employee Dental Vision Insurance Plan carriers, determines the actuarial liabilities, contributions, and funding payments for the Retirement, Health and Life Insurance programs, and provides actuarial support for employee benefit programs including the FEHB program, Federal Employees' Group Life Insurance, Federal Long-Term Care Insurance Program, Federal Employee Dental Vision Insurance Plan, Civil Service Retirement System, Federal Employees Retirement System, and Federal Flexible Spending Account Program.

**Human Resources Solutions (HRS)** provides human capital products and services that support Federal agencies in meeting their mission. Through both internal human capital experts and/or private sector partners, HRS helps agencies recruit and hire top talent, cultivate leaders, build Federal human resources capacity, optimize the performance management process, and sustain effective results-oriented organizations. HRS operates under the provisions of the Revolving Fund, 5 U.S.C. §1304 (e)(1), that authorizes OPM to perform personnel management services for Federal agencies on a cost reimbursable basis. HRS consists of four practice areas that work directly with customer agency partners via Interagency Agreement to deliver a complete range of human resources products and services, including government-to-government and private sector solutions. Some of this work is directed by statute, and other aspects are performed at the option of an agency that engages HRS in this work. This includes recruiting and examining candidates for positions for employment by Federal agencies nationwide; delivering leadership and development courses and programs, including the Leadership for a Democratic Society program; providing custom-designed technology systems (e.g., USAJOBS, USA Staffing, USA Hire<sup>SM</sup>, USA Performance<sup>®</sup>, and USA Learning) to support Federal agency recruitment, talent acquisition, performance management, and training priorities; developing organization and performance management strategies; and providing human capital management, organizational performance improvement, and training and development expertise delivered through best-in-class contracts.

**Merit System Accountability & Compliance (MSAC)** is responsible for a range of functions that support OPM's mission as a Federal human capital leader and its stewardship of the merit system. MSAC provides rigorous oversight to determine if Federal agency human resources programs are effective and efficient and comply with merit system principles and related civil service regulations. MSAC evaluates agencies' programs through a combination of OPM-led

evaluations and as participants in agency-led reviews. MSAC also conducts special cross-cutting studies to assess the use of HR authorities and flexibilities across the Government. Moreover, MSAC reviews and renders decisions on agencies' requests to appoint current or former political appointees to positions in the competitive service, the non-political excepted service, or the senior executive service to verify that such appointments conform to applicable selection requirements and are free of political influence. MSAC also adjudicates classification appeals, job grading appeals, Fair Labor Standards Act claims, compensation and leave claims, and declination of reasonable offer appeals, all of which provide Federal employees with administrative procedural rights to challenge compensation and related agency decisions without having to seek redress in Federal courts. MSAC has Government-wide oversight of the Combined Federal Campaign and the Voting Rights programs. The mission of the Combined Federal Campaign is to promote and support philanthropy through a program that is employee focused, cost-efficient, and effective in providing all Federal employees and annuitants the opportunity to improve the quality of life for all. The Voting Rights Program deploys Federal observers to monitor polling sites (as determined by the Attorney General) and provides written reports to the Department of Justice. Further, MSAC serves as the liaison between OPM program offices and oversight groups such as the Office of the Inspector General and the Government Accountability Office (GAO) and helps to coordinate audit activities to resolve recommendations.

**Retirement Services (RS)** is responsible for the administration of the Federal Retirement Program covering approximately 2.8 million active employees, including the United States Postal Service, and more than 2.7 million annuitants, survivors, and family members. RS develops and administers benefits programs and services that offer choice, value, and quality to help maintain the Government's position as a competitive employer. Activities include maintaining records and servicing credit accounts prior to retirement; initial eligibility determinations at retirement; adjudication of annuity benefits based on age and service, disability, or death according to relevant statutes and regulations. Once a case is adjudicated and added to the annuity roll, OPM continues to serve annuitants by making address or tax status changes to annuitant accounts, sending annual cost of living and tax information, surveying certain annuitants to confirm their continued eligibility to receive benefits, and conducting other post-adjudication activities.

**Suitability Executive Agent (SuitEA)** was established as a distinct program office within OPM in December 2016 to strengthen processes for personnel vetting, suitability determinations for Federal employment and Government contract work, and personnel credentialing for access to

agency systems and facilities across the Government. SuitEA prescribes suitability, fitness, and credentialing standards and procedures and oversees functions delegated to the heads of agencies while retaining jurisdiction for certain suitability determinations and taking Government-wide suitability actions when appropriate. It also issues guidelines and instructions to the heads of agencies to promote appropriate uniformity, centralization, efficiency, effectiveness, reciprocity, timeliness, and security in suitability/fitness/credentialing processes, and delivers training to suitability and fitness adjudicators across Government.

**Workforce Policy and Innovation (WPI)** is OPM’s workforce policy office. Formerly known as Employee Services (ES), WPI administers statutory and regulatory provisions related to recruitment, hiring, classification, strategic workforce planning, pay, leave, performance management and recognition, leadership and employee development, reskilling, work/life/wellness programs, labor and employee relations, and oversight of Federal Executive Boards. WPI equips Federal agencies with tools, flexibilities, and authorities, as well as forward-leaning strategic workforce planning products, to enable agencies to hire, develop, and retain an effective Federal workforce.





## Performance Budget by Strategic Goal

This section aligns OPM’s FY 2025 budget request to the agency’s strategic plan. Funding amounts, performance measures and targets, and next steps are detailed for each objective in the strategic plan. It is intended to meet the performance planning requirements of the Office of Management and Budget (OMB) Circular A-11, Part 6, Section 240 – Annual Performance Planning and Reporting.

The FY 2022 – FY 2026 OPM Strategic Plan includes four strategic goals to improve both program operations and cross-cutting management functions. The agency’s goals and objectives will guide efforts to accomplish OPM’s mission, which is, “[w]e are champions of talent for the Federal Government. We lead Federal agencies in workforce policies, programs, and benefits in service to the American people” and achieve its vision, which is, “We will create a new vision of work, together. We will position the Federal Government as a model employer for past and present employees through innovation, inclusivity, and leadership. We will build a rewarding culture that empowers the workforce to solve some of our nation’s toughest challenges.”

### Goals

**Strategic Goal 1:** Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points.

**Strategic Goal 2:** Transform OPM’s organizational capacity and capability to better serve as the leader in Federal human capital management.

**Strategic Goal 3:** Create a human-centered customer experience by putting the needs of OPM’s customers at the center of OPM’s workforce services, policy, and oversight, increasing OPM’s customer satisfaction index score for targeted services to 4.3 out of 5.

**Strategic Goal 4:** Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points.

### Additional Mission Activities

#### Aligned to Key Functions

OPM performs certain functions as required by statute, regulation, or Executive Order that do not align directly with a specific strategic goal within the strategic plan. Such functions include,

for example, the administration of the Combined Federal Campaign, providing voting rights observations for the Department of Justice, and operating the President’s Commission on White House Fellows.

### Mission Support Activities

OPM has also included in its budgetary request funds for information technology, contracting, facilities and security, financial management, and overhead functions. These administrative and executive leadership activities are grouped in the strategic plan as capacity-enabling functions.

The following table shows the resources budgeted against each of OPM’s goals. All resources are shown for each goal, including financing from:

- Common Services, which is an internal fund comprised of contributions from all OPM’s funding sources to finance the administrative functions within the agency.

#### FY 2025 Budget Request by Goal and Fund — All Resources

Strategic Goals	Dollars	FTE
<b>1 - Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points</b>	<b>\$335,666,271</b>	<b>502.4</b>
Salaries & Expenses	\$25,440,508	102.8
Trust Fund Annual	\$28,026	0.2
Common Services	\$69,604	0.5
Revolving Fund	\$309,726,032	396.5
Advances & Reimbursements Annual	\$342,128	2.0
Advances & Reimbursements No Year	\$59,973	0.4
<b>2 - Transform OPM’s organizational capacity and capability to better serve as the leader in Federal human capital management</b>	<b>\$225,482,615</b>	<b>258.4</b>
Salaries & Expenses	\$19,117,827	48.1
IT Modernization S&E	\$10,710,000	0.0
Trust Fund Annual	\$27,845,238	15.0
Common Services	\$63,401,207	58.9
Revolving Fund	\$101,162,278	135.4
Advances & Reimbursements Annual	\$171,064	1.0
5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$3,075,000	0.0
<b>3 - Create a human-centered customer experience by putting the needs of OPM’s customers at the center of OPM’s workforce services, policy, and oversight, increasing OPM’s customer satisfaction index score for targeted services to 4.3 out of 5</b>	<b>\$200,399,617</b>	<b>1,128.1</b>
Salaries & Expenses	\$16,038,452	35.3

<b>Strategic Goals</b>		
	<b>Dollars</b>	<b>FTE</b>
Trust Fund Annual	\$91,752,676	606.8
Common Services	\$468,621	0.0
Revolving Fund	\$22,807,286	31.0
Advances & Reimbursements No Year	\$59,973	0.4
5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$68,089,994	447.5
FERCCA (P.L. 106-265) - Retirement	\$1,182,615	7.0
<b>4 - Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points</b>	<b>\$53,003,747</b>	<b>115.6</b>
Salaries & Expenses	\$16,160,488	58.5
Trust Fund Annual	\$84,078	0.6
Common Services	\$235,144	1.5
Revolving Fund	\$36,173,054	52.9
Advances & Reimbursements Annual	\$171,064	1.0
Advances & Reimbursements No Year	\$179,919	1.2
<b>5 - Additional Mission and Mission Support Activities</b>	<b>\$543,046,353</b>	<b>1,164.9</b>
Salaries & Expenses	\$77,609,575	225.8
Trust Fund Annual	\$89,361,833	292.1
Common Services	\$90,789,547	289.8
Revolving Fund	\$246,109,477	305.5
Advances & Reimbursements Annual	\$12,596,998	26.7
Advances & Reimbursements No Year	\$6,291,000	0.0
5 U.S.C. § 8958(f)(2)(A) & 5 U.S.C. § 8988(f)(2)(A) - Dental & Vision	\$16,510,852	19.9
5 U.S.C. § 9004(f)(B) - Long-Term Care	\$1,486,683	4.9
5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$2,276,388	0.2
FERCCA (P.L. 106-265) - Retirement	\$14,000	0.0
<b>OPM Total</b>	<b>\$1,357,598,604</b>	<b>3,169.3</b>

Note: This table includes the budget of administrative activities funded by OPM's Common Services. Revolving fund financing for Common Services is also reflected.

The following table is a more granular view of the prior table. It shows the operating resources budgeted to each objective within the goals, and includes financing from:

- Advances and Reimbursements from other agencies for services performed on behalf of those agencies or to finance shared commitments such as the Security, Suitability, and Credentialing Line of Business.
- Resources spent as Common Services, which is an internal fund comprised of contributions from all of OPM’s funding sources to finance the administrative functions of the agency.

**FY 2025 Budget Request by Goal and Objective — All Resources**

STRATEGIC GOAL	STR NO	OBJECTIVES	Dollars	FTE
<b>1 - Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points</b>	<b>1.1</b>	Achieve a Federal workforce that is drawn from the diversity of America, exhibited at all levels of Government, by supporting agencies in fostering diverse, equitable, inclusive, and accessible workplaces. By FY 2026, increase a Government-wide Diversity, Equity, Inclusion, and Accessibility index score by 6 percentage points.	\$7,827,144	34.0
	<b>1.2</b>	Develop a Government-wide vision and strategy and implement policies and initiatives that embrace the future of work and position the Federal Government as a model employer with respect to hiring, talent development, competitive pay, benefits, and workplace flexibilities.	\$5,347,733	23.9
	<b>1.3</b>	Build the skills of the Federal workforce through hiring and training. By FY 2026, increase the Government-wide percentage of respondents who agree that their work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals by 4 points.	\$321,962,483	442.1
	<b>1.4</b>	Champion the Federal workforce by engaging and recognizing Federal employees and elevating their work. By FY 2026, increase the number of social media engagements on recognition-focused content by 15 percent.	\$528,911	2.3

STRATEGIC GOAL	STR NO	OBJECTIVES	Dollars	FTE
<b>Strategic Goal Total</b>			<b>\$335,666,271</b>	<b>502.4</b>
<b>2 - Transform OPM's organizational capacity and capability to better serve as the leader in Federal human capital management</b>	<b>2.1</b>	Build the skills of the OPM workforce and attract skilled talent. By FY 2026, increase the percentage of OPM employees who agree that their work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals by 3 percentage points.	\$9,710,944	52.3
	<b>2.2</b>	Improve OPM's relationships and standing as the human capital management thought leader. By FY 2026, increase the percent of CHCOs who strongly agree that OPM treats them as a strategic partner by 8 percentage points.	\$871,282	4.8
	<b>2.3</b>	Improve OPM's program efficacy through comprehensive risk management and contract monitoring across the agency. By FY 2026, achieve the OMB-set target for the percentage of spending under category management.	\$1,170,188	4.8
	<b>2.4</b>	Establish a sustainable funding and staffing model for OPM that better allows the agency to meet its mission. By FY 2026, increase the percentage of OPM managers who indicate that they have sufficient resources to get their jobs done by 4 percentage points.	\$10,249,391	2.2
	<b>2.5</b>	Modernize OPM IT by establishing an enterprise-wide approach, eliminating fragmentation, and aligning IT investments with core mission requirements. By FY 2026, increase the percentage of software projects implementing adequate incremental development to 95 percent.	\$202,564,053	191.4
	<b>2.6</b>	Promote a positive organizational culture where leadership drives an enterprise mindset, lives the OPM values, and supports employee engagement and professional growth. By FY 2026, increase OPM's Leaders Lead Score by 3 points.	\$916,757	3.0
	<b>Strategic Goal Total</b>			<b>\$225,482,615</b>

STRATEGIC GOAL	STR NO	OBJECTIVES	Dollars	FTE
<b>3 - Create a human-centered customer experience by putting the needs of OPM's customers at the center of OPM's workforce services, policy, and oversight, increasing OPM's customer satisfaction index score for targeted services to 4.3 out of 5</b>	<b>3.1</b>	Enhance the Retirement Services customer experience by providing timely, accurate, and responsive service that addresses the diverse needs of OPM's customers. By FY 2026, improve the customer satisfaction score to 4.2 out of 5.	\$161,555,871	1,063.6
	<b>3.2</b>	Create a personalized USAJOBS experience to help applicants find relevant opportunities. By FY 2026, improve applicant satisfaction to 4.1 out of 5 for the desktop platform and to 4.5 out of 5 for the mobile platform.	\$32,572,019	28.1
	<b>3.3</b>	Create a seamless customer and intermediary experience across OPM's policy, service, and oversight functions. By FY 2026, increase the average score for helpfulness of OPM human capital services in achieving human capital objectives to 4.5 out of 5.	\$6,100,328	35.6
	<b>3.4</b>	Transform the OPM website to a user-centric and user-friendly website. By FY 2026, achieve an average effectiveness score of 4 out of 5.	\$171,399	0.8
	<b>Strategic Goal Total</b>			<b>\$200,399,617</b>
<b>4 - Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points</b>	<b>4.1</b>	Foster a culture of creativity and innovation within OPM. By FY 2026, increase the percentage of employees who agree that innovation is valued by 4 points.	\$1,000,450	3.7

STRATEGIC GOAL	STR NO	OBJECTIVES	Dollars	FTE
	4.2	Increase focus on Government-wide policy work by shifting more low-risk delegations of authorities to agencies.	\$2,109,902	12.1
	4.3	Expand the quality and use of OPM’s Federal human capital data. By FY 2026, increase the percentage of CHCO survey respondents who agree that OPM provides agencies with high quality workforce data and information to be used in decision-making by 20 percentage points.	\$41,264,938	57.4
	4.4	Improve OPM’s ability to provide strategic human capital management leadership to agencies through expansion of innovation, pilots, and identification of best practices across Government. By FY 2026, provide Federal agencies with 25 best practices.	\$6,209,549	30.1
	4.5	Revamp OPM’s policy-making approach to be proactive, timely, systematic, and inclusive. By FY 2026, increase the percent of CHCOs who agree that OPM’s policy approach is responsive to agency needs by 8 percentage points.	\$851,243	4.0
	4.6	Streamline Federal human capital regulations and guidance to reduce administrative burden and promote innovation while upholding merit system principles. By FY 2026, improve CHCO agreement that human capital policy changes resulted in less administrative burden to agencies by 8 percentage points.	\$1,567,665	8.5
<b>Strategic Goal Total</b>			<b>\$53,003,747</b>	<b>115.6</b>
<b>Additional Mission and Mission Support Activities</b>	5.1	Additional Mission Activities Aligned to Key Functions	\$350,602,539	744.8
	5.2	Additional Mission Support Activities	\$235,143,815	603.1
<b>Strategic Goal Total</b>			<b>\$585,746,353</b>	<b>1347.9</b>
<b>OPM Total</b>			<b>\$1,400,298,604</b>	<b>3352.4</b>



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## FY 2025 Budget Request by Goal and Organization — All Resources

The following table shows FY 2025 operating resources for each strategic goal by organization. This includes:

Resources spent as Common Services which is an internal fund comprised of contributions from all of OPM's funding sources to finance the administrative functions within the agency.

	<u>Goal 1 Description</u>	<u>Goal 2 Description</u>	<u>Goal 3 Description</u>	<u>Goal 4 Description</u>	<u>Goal 5 Description</u>	
	Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points	Transform OPM's organizational capacity and capability to better serve as the leader in Federal human capital management	Create a human-centered customer experience by putting the needs of OPM's customers at the center of OPM's workforce services, policy, and oversight, increasing OPM's customer satisfaction index score for targeted services to 4.3 out of 5	Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points	Additional Mission and Mission Support Activities	Total
<b>Organization Name</b>						
Centrally Funded Items	\$0	\$0	\$0	\$0	\$5,133,956	<b>\$5,133,956</b>
Congressional, Legislative and Intergovernmental Affairs	\$242,437	\$0	\$0	\$242,437	\$3,030,157	<b>\$3,515,031</b>
Equal Employment Opportunity	\$0	\$0	\$0	\$0	\$1,238,025	<b>\$1,238,025</b>
Facilities, Security & Emergency Management	\$0	\$0	\$0	\$0	\$17,541,666	<b>\$17,541,666</b>
Federal Prevailing Rate Advisory Committee	\$0	\$0	\$0	\$0	\$179,520	<b>\$179,520</b>
Healthcare & Insurance	\$0	\$0	\$0	\$0	\$73,323,367	<b>\$73,323,367</b>
HR Solutions	\$309,222,688	\$895,839	\$22,442,850	\$7,207,620	\$93,885,879	<b>\$433,654,876</b>
Human Capital Data Management and Modernization	\$955,449	\$178,484	\$73,630	\$37,907,615	\$16,231,490	<b>\$55,346,668</b>
Merit System Accountability & Compliance	\$3,079,722	\$700,234	\$5,746,345	\$3,434,978	\$4,699,473	<b>\$17,660,752</b>

	<u>Goal 1 Description</u>	<u>Goal 2 Description</u>	<u>Goal 3 Description</u>	<u>Goal 4 Description</u>	<u>Goal 5 Description</u>	
	Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points	Transform OPM's organizational capacity and capability to better serve as the leader in Federal human capital management	Create a human-centered customer experience by putting the needs of OPM's customers at the center of OPM's workforce services, policy, and oversight, increasing OPM's customer satisfaction index score for targeted services to 4.3 out of 5	Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points	Additional Mission and Mission Support Activities	Total
<b>Organization Name</b>						
Office of Communications	\$192,313	\$76,926	\$38,462	\$0	\$3,250,949	<b>\$3,558,650</b>
Office of Diversity, Equity, Inclusion and Accessibility	\$2,839,298	\$0	\$0	\$0	\$2,615,272	<b>\$5,454,570</b>
Office of Procurement Operations	\$0	\$670,631	\$0	\$0	\$7,237,576	<b>\$7,908,207</b>
Office of Small and Disadvantaged Business Utilization	\$0	\$0	\$0	\$0	\$557,764	<b>\$557,764</b>
Office of the Chief Financial Officer	\$69,604	\$10,329,076	\$0	\$235,144	\$134,422,374	<b>\$145,056,198</b>
Office of the Chief Information Officer	\$0	\$202,275,758	\$16,529,393	\$0	\$58,185,608	<b>\$276,990,760</b>
Office of the Director	\$342,128	\$171,064	\$0	\$171,064	\$7,664,139	<b>\$8,348,395</b>

	<u>Goal 1 Description</u>	<u>Goal 2 Description</u>	<u>Goal 3 Description</u>	<u>Goal 4 Description</u>	<u>Goal 5 Description</u>	
	Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points	Transform OPM's organizational capacity and capability to better serve as the leader in Federal human capital management	Create a human-centered customer experience by putting the needs of OPM's customers at the center of OPM's workforce services, policy, and oversight, increasing OPM's customer satisfaction index score for targeted services to 4.3 out of 5	Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points	Additional Mission and Mission Support Activities	<b>Total</b>
<b>Organization Name</b>						
Office of the Executive Secretariat, Privacy, and Information Management	\$0	\$0	\$0	\$385,378	\$6,675,715	<b>\$7,061,093</b>
Office of the General Counsel	\$0	\$0	\$0	\$0	\$9,399,631	<b>\$9,399,631</b>
Office of the Inspector General	\$0	\$0	\$0	\$0	\$42,700,000	<b>\$42,700,000</b>
OPM Human Resources	\$0	\$9,898,889	\$0	\$0	\$4,584,633	<b>\$14,483,522</b>
Rent	\$0	\$0	\$0	\$0	\$27,338,283	<b>\$27,338,283</b>
Retirement Services	\$0	\$0	\$155,073,139	\$0	\$0	<b>\$155,073,139</b>
Security, Suitability and Credentialing Line of Business (SSCLOB)	\$0	\$0	\$0	\$0	\$8,146,000	<b>\$8,146,000</b>

	<u>Goal 1 Description</u>	<u>Goal 2 Description</u>	<u>Goal 3 Description</u>	<u>Goal 4 Description</u>	<u>Goal 5 Description</u>	
	Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points	Transform OPM's organizational capacity and capability to better serve as the leader in Federal human capital management	Create a human-centered customer experience by putting the needs of OPM's customers at the center of OPM's workforce services, policy, and oversight, increasing OPM's customer satisfaction index score for targeted services to 4.3 out of 5	Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points	Additional Mission and Mission Support Activities	Total
<b>Organization Name</b>						
Suitability Executive Agent Programs	\$0	\$259,714	\$0	\$211,868	\$11,261,107	<b>\$11,732,689</b>
White House Fellows	\$0	\$0	\$0	\$0	\$1,137,768	<b>\$1,137,768</b>
Workforce Policy and Innovation	\$18,722,632	\$26,000	\$495,798	\$3,207,643	\$45,306,001	<b>\$67,758,074</b>
<b>OPM Total</b>	<b>\$335,666,271</b>	<b>\$225,482,615</b>	<b>\$200,399,617</b>	<b>\$53,003,747</b>	<b>\$585,746,353</b>	<b>\$1,400,298,604</b>

## Additional Mission Activities Aligned to Key Functions

OPM performs certain functions as required by statute, regulation, or Executive Order that do not align directly with a specific strategic goal within the strategic plan. These mandated functions also include programs that benefit the Government at-large, including the administration of the Combined Federal Campaign, providing voting rights observations for the Department of Justice, and operating the President's Commission on White House Fellows.

### Key Functions

#### Human Capital Management Leadership

OPM's divisions and offices implement the programs and deliver the services that enable both OPM the agency to meet its strategic goals and enable other agencies to meet their respective strategic goals. OPM works in several broad categories to lead and serve the Federal Government in enterprise human resource management by delivering policies and services to achieve a trusted, effective civilian workforce, including Human Capital Management Leadership, Benefits, and Personnel Vetting.

#### Policy

The agency interprets and enforces governing law and provides policy direction and leadership in designing, developing, and promulgating Government-wide human capital systems, programs, and policies that support the current and emerging needs of Federal agencies. In addition, the agency provides technical support and guidance to agencies on the full range of human capital management policies and practices, including recruitment, hiring policy and classification, veterans' employment, strategic workforce planning, pay, leave, performance management and recognition, leadership and employee development, diversity and inclusion, work /life /wellness programs, accountability, labor and employee relations, and the Administrative Law Judges Program. OPM's leadership in these areas enables the Federal Government to anticipate drivers that will influence and impact the Federal workforce. OPM also reviews agency requests to exercise certain Government-wide personnel management authorities that are centrally administered or subject to OPM approval under law and oversees the implementation of key Administration priorities and goals concerning Government-wide human capital management matters.

#### Services

OPM provides customized human capital services and training to Federal agencies to help maximize their organizational and individual performance and to drive their mission results. Using the agency's internal human capital experts, shared service providers within Government, and/or contractors, OPM's Human Resources Solutions help agencies design effective organizations, recruit and hire top talent, develop and cultivate leaders, build Federal human resource professional capability, improve the performance management process, and achieve long-lasting human capital results.

OPM provides agencies with access to pre-competed private sector contractors through a unique partnership between OPM and GSA as part of the Government-wide Category Management effort. The private contractors, representing both large and small companies, complement OPM's internal capabilities in the areas of training and development, human capital management, and organizational performance improvement. OPM's involvement facilitates the delivery of services that are both effective and compliant with operative civil service law.

The agency provides a leadership development continuum that enables Federal executives, managers, and aspiring leaders to acquire knowledge and master skills so they can lead within a rapidly changing Government environment. Anchored by the Federal Executive Institute, OPM's leadership development infrastructure and programs also include the Presidential Management Fellows Program, the Federal HR Institute, the Process and Performance Improvement program, the Lab at OPM (human-centered design), and USA Learning®.

OPM generates Government-wide benefits through human resources information technology consolidation, standardization, and modernization. OPM offers Federal systems such as Enterprise Human Resource Integration, USA Learning®, USA Staffing®, USA Hire<sup>SM</sup>, and USA Performance®. OPM is also developing the necessary information technology infrastructure to facilitate the exchange of human resources data and information Government-wide, as appropriate. In addition, OPM leads the Government-wide transformation of human resources information technology by focusing on modernization, integration, and performance assessment.

The agency manages USAJOBS®, the official job site of the Federal Government. It is the one-stop source for Federal jobs and employment information through which, among other things, Federal agencies meet the legal obligations to provide public notice of Federal employment opportunities to Federal employees and American citizens. The USAJOBS® website is the portal for Federal recruitment for most Government positions, whether the positions are in the competitive or excepted service.

## Oversight

Through OPM’s oversight evaluation work, special studies, and collaboration with agencies, OPM assesses whether Federal human resources programs and human capital management systems are effective and consistent with merit system principles and related civil service requirements. OPM works directly with agencies to make improvements or changes to programs that are ineffective, inefficient, or not in compliance with Federal law to help them achieve mission objectives. OPM also adjudicates classification appeals, job grading appeals, Fair Labor Standards Act claims, compensation and leave claims, and declination of reasonable appeals, which provide Federal employees with procedural rights to challenge compensation and related agency decisions.

## Benefits

### Benefits for Federal Employees and Annuitants

OPM facilitates access to the high-caliber healthcare and insurance programs offered by the Federal Government and available to both active employees and annuitants. This includes health insurance, dental and vision insurance, life insurance, long-term care insurance, and flexible spending accounts. OPM manages insurance benefits for more than eight million Federal employees, retirees, and their families, employees of tribes or tribal organizations, and other eligible persons. In 2019, OPM also began offering dental and vision plans to military retirees and their families, members of the Retired Reserve, non-active Medal of Honor recipients, and survivors and family members of active-duty service members.

These high-quality benefits make Federal employment more attractive, enabling agencies to compete for good candidates with other potential employers.



## Retirement

OPM is responsible for the administration of the Civil Service Retirement System and the Federal Employees Retirement System covering 2.8 million active employees, including the United States Postal Service, and nearly 2.7 million annuitants, survivors, and family members. OPM also administers, develops, and provides Federal employees, retirees, and their families with benefits programs and services that offer choice, value, and quality to help maintain the Government's position as a competitive employer. Activities include record maintenance and service credit accounts prior to retirement; initial eligibility determinations at retirement; adjudication of annuity benefits based on age and service, disability, or death, all based on a myriad of statutes and regulations; post-retirement changes due to numerous life events; health and life insurance enrollments; Federal and state tax deductions; as well as other payroll functions.

## Personnel Vetting

The agency is responsible for prescribing suitability, fitness, and credentialing standards for Government employees and contractors. It works closely with the Director of National Intelligence to determine investigative standards. The agency issues guidelines and instructions to the heads of other agencies to promote uniformity and effectiveness when executing their delegated responsibilities, and OPM conducts oversight of agencies' programs and processes in this area, including oversight of suitability and credentialing investigations. OPM retains jurisdiction of suitability adjudications in circumstances where a Government-wide bar of an individual from Federal service is necessary to promote efficiency and protect the integrity of the civil service. The agency also provides Government-wide training for adjudicators that conforms to Government-wide training standards.

Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Additional Mission and Mission Support Activities</b>				
<b>5.1 Additional Mission Activities Aligned to Key Functions</b>			<b>\$350,602,539</b>	<b>744.8</b>
	Common Services (OPM)	Salaries & Expenses	\$40,160,149	350.6
	Common Services (OPM)	Trust Fund Annual	\$51,491,149	0.0
	Common Services (OPM)	5 U.S.C. § 8958(f)(2)(A) & 5 U.S.C. § 8988(f)(2)(A) - Dental & Vision	\$836,832	0.0
	Common Services (OPM)	5 U.S.C. § 9004(f)(B) - Long-Term Care	\$155,488	0.0
	Common Services (OPM)	5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$13,730,389	0.0
	Common Services (OPM)	FERCCA (P.L. 106-265) - Retirement	\$294,229	0.0
	Centrally Funded Items	Salaries & Expenses	\$4,358,616	1.0
	Centrally Funded Items	Trust Fund Annual	\$775,340	0.0
	Office of the Chief Information Officer	Salaries & Expenses	\$392,695	7.0
	Office of the Chief Information Officer	Common Services	\$7,891,186	41.0
	Office of the Chief Information Officer	Revolving Fund	\$922,056	11.0
	Workforce Policy and Innovation	Salaries & Expenses	\$18,840,966	91.4
	Workforce Policy and Innovation	Revolving Fund	\$11,284,666	63.0
	Healthcare & Insurance	Trust Fund Annual	\$55,308,783	230.6
	Healthcare & Insurance	5 U.S.C. § 8958(f)(2)(A) & 5 U.S.C. § 8988(f)(2)(A) - Dental & Vision	\$16,469,852	19.9
	Healthcare & Insurance	5 U.S.C. § 9004(f)(B) - Long-Term Care	\$1,477,683	4.9
	Healthcare & Insurance	5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$67,049	0.2
	HR Solutions	Revolving Fund	\$51,855,954	117.3

Strategic Objectives	Organization	Fund	Dollars	FTE
	Merit System Accountability & Compliance	Salaries & Expenses	\$1,745,792	9.1
	Merit System Accountability & Compliance	Common Services	\$1,006,681	5.0
	Merit System Accountability & Compliance	Advances & Reimbursements No Year	\$1,947,000	0.0
	Office of Small and Disadvantaged Business Utilization	Common Services	\$557,764	2.0
	Office of the Chief Financial Officer	Revolving Fund	\$98,391,837	3.5
	Rent	Salaries & Expenses	\$11,568,319	0.0
	Rent	Trust Fund Annual	\$14,705,964	0.0
	Rent	5 U.S.C. § 8958(f)(2)(A) & 5 U.S.C. § 8988(f)(2)(A) - Dental & Vision	\$41,000	0.0
	Rent	5 U.S.C. § 9004(f)(B) - Long-Term Care	\$9,000	0.0
	Rent	5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$1,000,000	0.0
	Rent	FERCCA (P.L. 106-265) - Retirement	\$14,000	0.0
	Suitability Executive Agent Programs	Revolving Fund	\$11,261,107	56.9
	Security, Suitability and Credentialing Line of Business (SSCLOB)	Salaries & Expenses	\$543,000	0.0
	Security, Suitability and Credentialing Line of Business (SSCLOB)	Advances & Reimbursements Annual	\$3,259,000	11.0
	Security, Suitability and Credentialing Line of Business (SSCLOB)	Advances & Reimbursements No Year	\$4,344,000	0.0
	White House Fellows	Salaries & Expenses	\$1,137,768	3.0
	OPM Human Resources	Salaries & Expenses	\$200,000	0.0
	OPM Human Resources	Common Services	\$3,579,340	7.0
	Office of the General Counsel	Trust Fund Annual	\$380,977	1.5

Strategic Objectives	Organization	Fund	Dollars	FTE
	Office of the General Counsel	Common Services	\$9,018,654	39.5
	Human Capital Data Management and Modernization	Salaries & Expenses	\$2,498,898	9.6
	Human Capital Data Management and Modernization	Revolving Fund	\$13,732,592	9.5
	Office of Diversity, Equity, Inclusion and Accessibility	Salaries & Expenses	\$15,000	0.0
<b>OPM Total</b>			<b>\$350,602,539</b>	<b>744.8</b>



## Additional Mission Support Activities

OPM has also included in its budgetary request funds for information technology, contracting, facilities and security, financial management, FOIA, privacy policy and compliance, records management, and overhead functions that do not align directly with a specific strategic goal within the strategic plan.

### Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Additional Mission and Mission Support Activities</b>				
<b>5.2 Additional Mission Support Activities</b>			<b>\$235,143,815</b>	<b>603.1</b>
	Office of the Chief Information Officer	Salaries & Expenses	\$9,721,149	14.0
	Office of the Chief Information Officer	Trust Fund Annual	\$9,339	0.0
	Office of the Chief Information Officer	Common Services	\$24,830,170	18.8
	Office of the Chief Information Officer	Revolving Fund	\$14,409,674	9.0
	Office of the Chief Information Officer	5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$9,339	0.0
	Congressional, Legislative and Intergovernmental Affairs	Salaries & Expenses	\$2,800,064	14.0
	Congressional, Legislative and Intergovernmental Affairs	Trust Fund Annual	\$230,093	1.0
	Workforce Policy and Innovation	Salaries & Expenses	\$6,965,035	16.9
	Workforce Policy and Innovation	Revolving Fund	\$2,215,334	0.0
	Workforce Policy and Innovation	Advances & Reimbursements Annual	\$6,000,000	0.0
	Equal Employment Opportunity	Common Services	\$1,238,025	7.0
	Facilities, Security & Emergency Management	Salaries & Expenses	\$226,570	2.0
	Facilities, Security & Emergency Management	Trust Fund Annual	\$494,344	5.0
	Facilities, Security & Emergency Management	Common Services	\$13,760,158	66.3
	Facilities, Security & Emergency Management	Advances & Reimbursements Annual	\$3,060,594	15.7
	Federal Prevailing Rate Advisory Committee	Salaries & Expenses	\$179,520	1.0

Strategic Objectives	Organization	Fund	Dollars	FTE
	HR Solutions	Revolving Fund	\$42,029,925	35.3
	Office of Communications	Salaries & Expenses	\$2,745,963	12.8
	Office of Communications	Trust Fund Annual	\$504,986	3.0
	Office of the Executive Secretariat, Privacy, and Information Management	Salaries & Expenses	\$1,186,880	5.3
	Office of the Executive Secretariat, Privacy, and Information Management	Trust Fund Annual	\$114,466	1.0
	Office of the Executive Secretariat, Privacy, and Information Management	Common Services	\$5,374,369	14.0
	Office of Procurement Operations	Salaries & Expenses	\$1,116,404	4.6
	Office of Procurement Operations	Trust Fund Annual	\$414,353	2.0
	Office of Procurement Operations	Common Services	\$5,706,819	27.1
	Office of the Chief Financial Officer	Salaries & Expenses	\$1,216,346	4.3
	Office of the Chief Financial Officer	Trust Fund Annual	\$16,423,188	48.0
	Office of the Chief Financial Officer	Common Services	\$17,184,671	58.1
	Office of the Chief Financial Officer	Revolving Fund	\$6,332	0.0
	Office of the Chief Financial Officer	5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$1,200,000	0.0
	Office of the Director	Salaries & Expenses	\$7,386,735	29.0
	Office of the Director	Advances & Reimbursements Annual	\$277,404	0.0
	OPM Human Resources	Salaries & Expenses	\$163,583	1.0
	OPM Human Resources	Common Services	\$641,710	4.0
	Office of Diversity, Equity, Inclusion and Accessibility	Salaries & Expenses	\$2,600,272	0.0
<b>OPM Total</b>			<b>\$235,143,815</b>	<b>603.1</b>

## Strategic Goal 1: Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points

### Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points</b>				
<b>1.1 - Achieve a Federal workforce that is drawn from the diversity of America, exhibited at all levels of Government, by supporting agencies in fostering diverse, equitable, inclusive, and accessible workplaces. By FY 2026, increase a Government-wide Diversity, Equity, Inclusion, and Accessibility index score by 6 percentage points.</b>			<b>\$7,827,144</b>	<b>34.0</b>
	Workforce Policy and Innovation	Salaries & Expenses	\$1,563,441	7.0
	HR Solutions	Revolving Fund	\$2,699,560	8.2
	Merit System Accountability & Compliance	Salaries & Expenses	\$369,569	2.1
	Human Capital Data Management and Modernization	Salaries & Expenses	\$174,680	0.8
	Human Capital Data Management and Modernization	Revolving Fund	\$180,596	1.0
	Office of Diversity, Equity, Inclusion and Accessibility	Salaries & Expenses	\$2,839,298	15.0
<b>1.2 - Develop a Government-wide vision and strategy and implement policies and initiatives that embrace the future of work and position the Federal Government as a model employer with respect to hiring, talent development, competitive pay, benefits, and workplace flexibilities.</b>			<b>\$5,347,733</b>	<b>23.9</b>
	Congressional, Legislative and Intergovernmental Affairs	Salaries & Expenses	\$242,437	1.0
	Workforce Policy and Innovation	Salaries & Expenses	\$3,432,496	14.5
	HR Solutions	Revolving Fund	\$731,492	3.3
	Merit System Accountability & Compliance	Salaries & Expenses	\$100,467	0.6
	Office of the Chief Financial Officer	Common Services	\$69,604	0.5
	Office of the Director	Advances & Reimbursements Annual	\$171,064	1.0
	Human Capital Data Management and Modernization	Salaries & Expenses	\$277,425	1.2
	Human Capital Data Management and Modernization	Revolving Fund	\$322,748	1.8



Strategic Objectives	Organization	Fund	Dollars	FTE
<b>1.3 - Build the skills of the Federal workforce through hiring and training. By FY 2026, increase the Government-wide percentage of respondents who agree that their work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals by 4 points.</b>			\$321,962,483	442.1
	Workforce Policy and Innovation	Salaries & Expenses	\$13,655,167	44.0
	HR Solutions	Revolving Fund	\$305,697,630	381.8
	Merit System Accountability & Compliance	Salaries & Expenses	\$2,521,687	15.7
	Merit System Accountability & Compliance	Trust Fund Annual	\$28,026	0.2
	Merit System Accountability & Compliance	Advances & Reimbursements No Year	\$59,973	0.4
<b>1.4 - Champion the Federal workforce by engaging and recognizing Federal employees and elevating their work. By FY 2026, increase the number of social media engagements on recognition-focused content by 15 percent.</b>			\$528,911	2.3
	Workforce Policy and Innovation	Salaries & Expenses	\$71,528	0.3
	HR Solutions	Revolving Fund	\$94,006	0.3
	Office of Communications	Salaries & Expenses	\$192,313	0.8
	Office of the Director	Advances & Reimbursements Annual	\$171,064	1.0
<b>OPM Total</b>			<b>\$335,666,271</b>	<b>502.4</b>

**Objective 1.1: Achieve a Federal workforce that is drawn from the diversity of America, exhibited at all levels of Government, by supporting agencies in fostering diverse, equitable, inclusive, and accessible workplaces. By FY 2026, increase a Government-wide Diversity, Equity, Inclusion, and Accessibility index score by 6 percentage points.**

**Strategic Objective Owner:** Tanya Sehgal, Acting Director, ODEIA

**Deputy Strategic Objective Owner:** Michelle Earley, Deputy Associate Director, HRS

## Strategies

- Review policies and practices to eliminate potential barriers to equity, and develop plans to eliminate those within OPM’s authority, in each of the following workforce functions: recruitment; hiring; promotion; retention; professional evaluations and rewards; professional development programs; the availability of mentoring programs or sponsorship initiatives, employee resource group and affinity group programs; temporary employee details and assignments
- Track demographic data and leverage expertise to look deeply at diversity, equity, inclusion, and accessibility across grade/pay levels and the employee lifecycle to the extent permitted by law
- Improve outreach and recruitment from historically underserved communities by promoting partnerships, paid internships, fellowships, and apprenticeships
- Utilize diversity, equity, inclusion, and accessibility assessment tool to evaluate agency recruitment, hiring, promotion, retention, professional development, pay equity, reasonable accommodations access, and training policies and practices for fairness and impartiality across all pay levels
- Assess potential barriers to access and advance employment opportunities (to include SES) and equity for employees with disabilities and develop plans to eliminate those barriers
- Assess potential barriers to employment for LGBTQ+ employees, including non-binary gender marker options in Federal hiring, employment, personnel vetting, and benefits enrollment paperwork and develop plans to eliminate any barriers identified and advance equities across the employment lifecycle
- Review job classification pay-setting regulations and guidance and draft proposals to promote pay equity across all levels of Government

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### FY 2024 and FY 2025 Next Steps:

\* Delayed milestone carried over from a previous fiscal year

Key Milestones	Implementing Organization(s)	Target Completion
Implement interventions recommended by the FY 2023 assessment of the personnel vetting process to eliminate barriers to transgender, gender non-conforming, and non-binary employees and applicants	ODEIA, SuitEA	FY 2024

Key Milestones	Implementing Organization(s)	Target Completion
Expand data offered in the DEIA Dashboard shared with agencies	ODEIA, HRS, HCDMM	FY 2024
Evaluate progress toward expanded outreach to promote public service careers, particularly with underserved communities	ODEIA, HRS	FY 2024
Create relationships with national policy think tanks or other relevant organizations to pilot a program/marketing campaign focused on recruitment and retention of early career talent and underrepresented communities, such as outreach and recruiting of the formerly incarcerated	ODEIA	FY 2024
Create web presence for ODEIA and the Chief Diversity Officer Executive Council on OPM.gov for internal and external stakeholders to Government to access public resources, common templates, and other relevant DEIA documents generated from the Council, which can serve as a DEIA destination for public and private stakeholders	ODEIA	FY 2024
Conduct a formative evaluation to assess agency retirement readiness plans and programs and their effects on underserved communities to inform development of evidence-based education and future evaluations	OCFO	FY 2024
Create a streamlined and standardized process for the collection of DEIA Strategic Plans and the measurement of annual progress	ODEIA, HCDMM	FY 2024
Publish final regulations that prohibit the use of non-Federal salary history in setting pay for Federal employment offers	WPI	FY 2024
Provide guidance to agencies on climate and culture assessment, barrier analysis, and intersectionality*	ODEIA	FY 2024
Expand data offered in the DEIA Dashboard shared with agencies	ODEIA, HRS, HCDMM	FY 2025
Create a plan for Government-wide DEIA training for the Federal workforce	ODEIA, WPI, HRS	FY 2025
Develop a resource repository for best practices for agencies for DEIA	ODEIA, WPI, HRS, MSAC	FY 2025

Key Milestones	Implementing Organization(s)	Target Completion
Develop and launch public web presence strategy for people with disabilities, early career talent, and justice-involved to enhance model employer status	ODEIA	FY 2025
Reform Federal Equal Opportunity Recruitment Program and agency DEIA strategic plan and annual progress data collection process	ODEIA	FY 2025
Publish DEIA annual report with expanded measures (for example, aggregate progress in implementing DEIA strategic plans and any updated self-reported demographic data)	ODEIA	FY 2025

### Performance Measures

\_ \* No historical results.

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Government-wide Diversity, Equity, Inclusion, and Accessibility index score	_ *	_ *	_ *	69	71	73	74

### Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points</b>				
<b>1.1 - Achieve a Federal workforce that is drawn from the diversity of America, exhibited at all levels of Government, by supporting agencies in fostering diverse, equitable, inclusive, and accessible workplaces. By FY 2026, increase a Government-wide Diversity, Equity, Inclusion, and Accessibility index score by 6 percentage points.</b>			\$7,827,144	34.0
	Workforce Policy and Innovation	Salaries & Expenses	\$1,563,441	7.0
	HR Solutions	Revolving Fund	\$2,699,560	8.2
	Merit System Accountability & Compliance	Salaries & Expenses	\$369,569	2.1
	Human Capital Data Management and Modernization	Salaries & Expenses	\$174,680	0.8

Strategic Objectives	Organization	Fund	Dollars	FTE
	Human Capital Data Management and Modernization	Revolving Fund	\$180,596	1.0
	Office of Diversity, Equity, Inclusion and Accessibility	Salaries & Expenses	\$2,839,298	15.0
<b>OPM Total</b>			<b>\$7,827,144</b>	<b>34.0</b>

**Objective 1.2: Develop a Government-wide vision and strategy and implement policies and initiatives that embrace the future of work and position the Federal Government as a model employer with respect to hiring, talent development, competitive pay, benefits, and workplace flexibilities.**

**Strategic Objective Owner:** Jason Barke, Deputy Associate Director for Strategic Workforce Planning, WPI

**Deputy Strategic Objective Owner:** Margot Conrad, Deputy Chief of Staff, Office of the Director; Danielle Opalka, Supervisory HR Specialist, WPI

### Strategies

- Support agencies by providing human capital tools, guidance, and services as they transition to the post-reentry work environment
- Create a vision and strategy for how the Federal Government can be a model employer with respect to hiring, talent development, competitive pay, benefits, and workplace flexibilities in the years to come, in alignment with the President’s Management Agenda
- Develop and advance human capital policies to support the longer-term future of work
- Execute on the Government-wide vision and strategy through supporting agencies on human capital issues to prepare them for the Future of Work

### FY 2024 and FY 2025 Next Steps:

Key Milestones	Implementing Organization(s)	Target Completion
Collaborate with agencies to identify and evaluate Future of the Workforce pilots	WPI, HRS, OCFO, MSAC	FY 2024

Key Milestones	Implementing Organization(s)	Target Completion
Refine and explore legislative and regulatory recommendations, and issue policy and guidance	WPI, CLIA, OD	FY 2024
Launch additional data dashboards for agencies to track progress and share agency efforts enterprise-wide	WPI, HCDMM, OCIO	FY 2024
Develop additional technical assistance and fee-for-service solutions to support agencies in preparing for the Future of the Workforce	WPI, HRS, MSAC, OD	FY 2024
Issue OPM playbook that further defines the Workforce of the Future priority areas	WPI, HRS, HCDMM, CHCOC, ODEIA	FY 2024
Implement Future of the Workforce Strategic Workforce Planning Group Strategic Plan and consult with agencies to support their long-term strategic workforce planning and foresight efforts	WPI, OD, MSAC	FY 2025
Pursue potential legislative, regulatory, and guidance changes identified in the FY 2025 legislative agenda and 'unified regulatory agenda' related to the Future of the Workforce	WPI, CLIA	FY 2025
Conduct research studies on key Future of the Workforce topics such as remote work/telework data from the new EHRI variable	OCFO, WPI, HRS, HCDMM	FY 2025

**Performance Measures**

\_ \* No historical results.

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Percent of CHCOs who report they have the necessary guidance and resources from OPM to inform their future of work planning	_ *	_ *	_ *	81.82%	61.29%	83.00%	86.00%

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Percent of CHCOs who report they find the services from OPM to inform their future of work planning helpful	-*	-*	-*	69.70%	63.33%	75.70%	82.00%

Note: CHCOs are defined as the CHCOs and deputy CHCOs of the *CHCO Act of 2002* agencies. FY 2022 results were collected via a survey deployed between December 2021 and January 2022 (Q1 and Q2 FY 2023). FY 2023 results were collected via a survey in October 2022 (Q1 FY 2023). In July 2023, OPM revised the FY 2024 target for the measure Percent of CHCOs who report they find the services from OPM to inform their future of work planning helpful.

### Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points</b>				
<b>1.2 - Develop a Government-wide vision and strategy and implement policies and initiatives that embrace the future of work and position the Federal Government as a model employer with respect to hiring, talent development, competitive pay, benefits, and workplace flexibilities.</b>			<b>\$5,347,733</b>	<b>23.9</b>
	Congressional, Legislative and Intergovernmental Affairs	Salaries & Expenses	\$242,437	1.0
	Workforce Policy and Innovation	Salaries & Expenses	\$3,432,496	14.5
	HR Solutions	Revolving Fund	\$731,492	3.3
	Merit System Accountability & Compliance	Salaries & Expenses	\$100,467	0.6
	Office of the Chief Financial Officer	Common Services	\$69,604	0.5
	Office of the Director	Advances & Reimbursements Annual	\$171,064	1.0
	Human Capital Data Management and Modernization	Salaries & Expenses	\$277,425	1.2
	Human Capital Data Management and Modernization	Revolving Fund	\$322,748	1.8
<b>OPM Total</b>			<b>\$5,347,733</b>	<b>23.9</b>

**Objective 1.3: Build the skills of the Federal workforce through hiring and training. By FY 2026, increase the Government-wide percentage of respondents who agree that their work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals by 4 points.**

**Strategic Objective Owner:** Kim Holden, Principal Deputy Associate Director, WPI

**Deputy Strategic Objective Owners:** Ana Mazzi, Principal Deputy Associate Director, MSAC; Daluana Gammon, Manager, HRS

### Strategies

- Modernize the Federal workforce competency model
- Strengthen the Federal human resource, acquisitions, and cybersecurity workforce
- Facilitate recruiting and hiring of diverse, early career talent by implementing recently enacted statutory changes applicable to early career talent, modernizing the Pathways program, and designing innovative paid internship programs
- Launch a new initiative to promote innovation in Federal talent across Government by creating a new process to identify and develop, select, high-impact talent projects
- Implement improvements to the competitive hiring process, including adoption of new selection rules (for example, the “rule of many”)
- Expand training offerings for human capital professionals and leaders focused on customer service and problem solving
- Drive improvements to assessments used for Federal hiring by establishing Government-wide hiring assessment line of business and agency talent teams
- Leverage Competency Exploration for Development and Readiness tool to conduct Government-wide skill gaps analysis across multiple high-risk functions and develop resources to address identified skill gaps
- Create a talent surge playbook to support agencies to acquire the skillsets needed to achieve their missions
- Support agencies in advancing the implementation of skills-based hiring approaches to fill priority positions



- Develop comprehensive training and curriculum for HR practitioners and hiring managers on pooled hiring
- Expand technical recruitment assistance for agencies
- Build web content tailored to hiring managers and HR practitioners to streamline communication and resource access
- Run dedicated cross-Government hiring actions that maximize resources and minimize duplication of efforts, giving tech talent the ability to apply one time and be considered for many opportunities and for one hiring action to yield many hires
- Upgrade talent acquisition automation tools to enhance efficiency in candidate sourcing and screening, facilitating smoother recruitment processes and enabling agencies to attract top AI talent

**FY 2024 and FY 2025 Next Steps:**

\* Delayed milestone carried over from a previous fiscal year

Key Milestones	Implementing Organization(s)	Target Completion
Evaluate the end-to-end hiring model to include preceding planning steps	WPI, HRS, MSAC	FY 2024
Design and implement research studies on current hiring practices and potential solutions to hiring challenges	OCFO, MSAC	FY 2024
Publish the final rule for the Pathways Programs regulation*	WPI, HRS, MSAC	FY 2024
Publish the final rule for the Rule of Many regulation*	WPI, HRS, MSAC	FY 2024
Determine the feasibility of developing a skills/career exploration tool	HRS, WPI	FY 2024
Develop guidance for Applicant Flow Data Structure, Access, and Use*	ODEIA, WPI	FY 2024
Develop a tool to assist agencies in developing analysts to assess the effectiveness of hiring process in meeting DEIA outcomes*	ODEIA, OD, WPI	FY 2024
Identify promising strategies that could be scaled to address mission critical skills gaps	WPI, MSAC, HRS	FY 2025
Pilot Government-wide HR Internship	WPI, HRS, MSAC	FY 2025
Develop prototype skills/career exploration tool	HRS, WPI, MSAC	FY 2025
Deploy new features in talent acquisition systems to improve HR and hiring managers experience*	WPI, HRS, MSAC	FY 2025

Key Milestones	Implementing Organization(s)	Target Completion
Include new demographic response options (for example Sexual Orientation and Gender Identity) in the AFD collection form*	WPI	FY 2025

## Performance Measures

\_ \* No historical results.

^ In July 2023, OPM corrected previously reported historical results.

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Percent of respondents who agree that their work units have the job-relevant knowledge and skills necessary to accomplish organizational goals	81%	82%	80%	79%	80%	82%	84%
Average score for hiring manager satisfaction that applicants to human resources, acquisitions, and cybersecurity positions are referred in a timely manner with the necessary skills to perform the job	_ *	_ *	_ *	4.17	4.04	4.19	4.20
Percent of vacancies using alternative assessments to replace or augment the self-report occupational questionnaire	_ *	9.05%^	10.54%^	8.12%^	11.43%	12.00%	13.00%

Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points</b>				
<b>1.3 - Build the skills of the Federal workforce through hiring and training. By FY 2026, increase the Government-wide percentage of respondents who agree that their work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals by 4 points.</b>			\$321,962,483	442.1
	Workforce Policy and Innovation	Salaries & Expenses	\$13,655,167	44.0
	HR Solutions	Revolving Fund	\$305,697,630	381.8
	Merit System Accountability & Compliance	Salaries & Expenses	\$2,521,687	15.7
	Merit System Accountability & Compliance	Trust Fund Annual	\$28,026	0.2
	Merit System Accountability & Compliance	Advances & Reimbursements No Year	\$59,973	0.4
<b>OPM Total</b>			<b>\$321,962,483</b>	<b>442.1</b>

**Objective 1.4: Champion the Federal workforce by engaging and recognizing Federal employees and elevating their work. By FY 2026, increase the number of social media engagements on recognition-focused content by 15 percent.**

**Strategic Objective Owner:** Yahaira Lopez, Senior Advisor, OD

**Deputy Strategic Objective Owners:** Laura Goulding, Deputy Director, OC; Terese Bell, HR Specialist, WPI; Erikka Knuti, Director of Communications, OC

**Strategies**

- Share best practices related to engagement and recognition across Federal agencies through CHCOs, Federal Executive Boards, the White House, and other stakeholders with shared missions
- Increase attention to programs that regularly spotlight workers and union members at OPM and across the Federal Government throughout the year, culminating with Public Service Recognition Week

- Create an OPM-led interagency working group focused on recognizing and elevating the Federal workforce

### FY 2024 and FY 2025 Next Steps

Key Milestones	Implementing Organization(s)	Target Completion
Create a new "Worker Empowerment" web page on OPM.gov	OC, WPI	FY 2024
Solicit feedback from CHCOs to inform future deliverables and products related to engaging and recognizing the Federal workforce	OD, CHCOC	FY 2024
Develop a social media toolkit for Government-wide use focused on how agencies can elevate their workers through storytelling	OC, WPI	FY 2025

### Performance Measures

\* No historical results.

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Number of social media engagements on recognition-focused content	_*	_*	_*	195389	156066	214918	224687

### Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Position the Federal Government as a model employer, improving the Government-wide satisfaction index score by 4 points</b>				
<b>1.4 - Champion the Federal workforce by engaging and recognizing Federal employees and elevating their work. By FY 2026, increase the number of social media engagements on recognition-focused content by 15 percent.</b>			<b>\$528,911</b>	<b>2.3</b>
	Workforce Policy and Innovation	Salaries & Expenses	\$71,528	0.3
	HR Solutions	Revolving Fund	\$94,006	0.3
	Office of Communications	Salaries & Expenses	\$192,313	0.8
	Office of the Director	Advances & Reimbursements Annual	\$171,064	1.0
<b>OPM Total</b>			<b>\$528,911</b>	<b>2.3</b>



## Strategic Goal 2: Transform OPM’s organizational capacity and capability to better serve as the leader in Federal human capital management

### Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Transform OPM’s organizational capacity and capability to better serve as the leader in Federal human capital management</b>				
<b>2.1 - Build the skills of the OPM workforce and attract skilled talent. By FY 2026, increase the percentage of OPM employees who agree that their work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals by 3 percentage points.</b>			\$9,710,944	52.3
	HR Solutions	Revolving Fund	\$38,286	0.1
	Merit System Accountability & Compliance	Salaries & Expenses	\$194,899	1.2
	OPM Human Resources	Salaries & Expenses	\$36,644	0.0
	OPM Human Resources	Trust Fund Annual	\$657,309	4.0
	OPM Human Resources	Common Services	\$8,783,806	47.0
<b>2.2 - Improve OPM’s relationships and standing as the human capital management thought leader. By FY 2026, increase the percent of CHCOs who strongly agree that OPM treats them as a strategic partner by 8 percentage points.</b>			\$871,282	4.8
	Workforce Policy and Innovation	Salaries & Expenses	\$26,000	0.0
	HR Solutions	Revolving Fund	\$12,272	0.1
	Merit System Accountability & Compliance	Salaries & Expenses	\$458,469	2.9
	Office of Communications	Salaries & Expenses	\$76,926	0.3
	Office of the Chief Financial Officer	Common Services	\$126,551	0.5
	Office of the Director	Advances & Reimbursements Annual	\$171,064	1.0
<b>2.3 - Improve OPM’s program efficacy through comprehensive risk management and contract monitoring across the agency. By FY 2026, achieve the OMB-set target for the percentage of spending under category management.</b>			\$1,170,188	4.8
	HR Solutions	Revolving Fund	\$499,557	2.0
	Office of Procurement Operations	Salaries & Expenses	\$328,101	1.4

Strategic Objectives	Organization	Fund	Dollars	FTE
	Office of Procurement Operations	Common Services	\$342,530	1.4
<b>2.4 - Establish a sustainable funding and staffing model for OPM that better allows the agency to meet its mission. By FY 2026, increase the percentage of OPM managers who indicate that they have sufficient resources to get their jobs done by 4 percentage points.</b>			\$10,249,391	2.2
	Merit System Accountability & Compliance	Salaries & Expenses	\$46,866	0.2
	Office of the Chief Financial Officer	Salaries & Expenses	\$2,330,146	0.0
	Office of the Chief Financial Officer	Common Services	\$7,872,379	2.0
<b>2.5 - Modernize OPM IT by establishing an enterprise-wide approach, eliminating fragmentation, and aligning IT investments with core mission requirements. By FY 2026, increase the percentage of software projects implementing adequate incremental development to 95 percent.</b>			\$202,564,053	191.4
	Office of the Chief Information Officer	Salaries & Expenses	\$15,429,849	42.0
	Office of the Chief Information Officer	IT Modernization S&E	\$10,710,000	0.0
	Office of the Chief Information Officer	Trust Fund Annual	\$27,187,929	11.0
	Office of the Chief Information Officer	Common Services	\$46,019,811	7.0
	Office of the Chief Information Officer	Revolving Fund	\$99,853,168	130.0
	Office of the Chief Information Officer	5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$3,075,000	0.0
	HR Solutions	Revolving Fund	\$288,295	1.4
<b>2.6 - Promote a positive organizational culture where leadership drives an enterprise mindset, lives the OPM values, and supports employee engagement and professional growth. By FY 2026, increase OPM's Leaders Lead Score by 3 points.</b>			\$916,757	3.0
	HR Solutions	Revolving Fund	\$57,429	0.2
	Suitability Executive Agent Programs	Revolving Fund	\$259,714	1.2
	OPM Human Resources	Salaries & Expenses	\$165,000	0.0
	OPM Human Resources	Common Services	\$256,130	1.0
	Human Capital Data Management and Modernization	Salaries & Expenses	\$24,927	0.1
	Human Capital Data Management and Modernization	Revolving Fund	\$153,557	0.6
<b>OPM Total</b>			<b>\$225,482,615</b>	<b>258.4</b>

Objective 2.1: Build the skills of the OPM workforce and attract skilled talent. By 2026, increase the percentage of OPM employees who agree that their work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals by 3 percentage points.

**Strategic Objective Owner:** Carmen Garcia, HR Director and Chief Human Capital Officer, OPM HR

**Deputy Strategic Objective Owners:** Tierra Eley, Chief Learning Officer, OPM HR

**Strategies**

- Determine existing competency gaps between employees’ current skills and those skills required to achieve workforce planning, recruitment, retention, and talent development goals
- Create and implement targeted cross-functional developmental opportunities that align with talent management (or reskilling and upskilling) needs
- Leverage compensation, flexible work arrangements, and strategic hiring initiatives on an enterprise-level to attract a highly skilled and diverse OPM workforce
- Equip HR professionals with new tools and capabilities to effectively support mission needs through the creation of a dedicated talent team
- Accelerate hiring in areas within OPM necessary to deliver on key objectives within strategic plan

**FY 2024 and FY 2025 Next Steps:**

Key Milestones	Implementing Organization(s)	Target Completion
Assess the agency's rotational program and implement changes as needed	OPM HR	FY 2024
Develop executive coaching program plan	OPM HR	FY 2024
Increase partnerships with other program and support offices to expand recruitment sources and visibility	OPM HR	FY 2024
Assess strategic recruitment impact through analysis of hiring or applicant data	OPM HR	FY 2024
Assess results of talent planning strategy through review of HR data	OPM HR	FY 2024



Key Milestones	Implementing Organization(s)	Target Completion
Assess the agency's hiring plan	OPM HR	FY 2024
Increase data availability to identify and assess use of flexibilities	OPM HR	FY 2024
Develop plan to address skills gaps in OPM's mission critical occupations	OPM HR	FY 2024
Implement executive coaching program plan	OPM HR	FY 2024
Develop revised Individual Development Plan	OPM HR	FY 2024
Pilot the revised Individual Development Plan with a subset of the agency	OPM HR	FY 2024
Implement Federal Rotational Cyber Workforce Program to develop knowledge and skills of cyber employees	OPM HR, OCIO	FY 2024
Develop Executive Candidate Development Program	OPM HR	FY 2025
Refine supervisory development framework and training program	OPM HR	FY 2025
Develop program for rotational opportunities for early career talent (for example, Presidential Management Fellows)	OPM HR	FY 2025
Integrate the Strategic Hiring Committee requirements into staffing plans	OPM HR	FY 2025
Implement software and tools to assist in automated hiring and onboarding workflows	OPM HR	FY 2025
Execute competency gap assessment plan	OPM HR	FY 2025
Execute agency-wide talent development plan	OPM HR	FY 2025
Expand revised Individual Development Plan pilot to the entire agency	OPM HR	FY 2025
Develop OPM mentoring program plan	OPM HR	FY 2025
Execute OPM mentoring program	OPM HR	FY 2025
Implement plan to address skills gaps in OPM's mission critical occupations	OPM HR, MSAC	FY 2025

Performance Measures

\_ \* No historical results.

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Percent of respondents who agree that their work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals	84.80%	85.80%	80.90%	82.30%	83.64%	82.42%	83.17%

Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Transform OPM’s organizational capacity and capability to better serve as the leader in Federal human capital management</b>				
<b>2.1 - Build the skills of the OPM workforce and attract skilled talent. By FY 2026, increase the percentage of OPM employees who agree that their work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals by 3 percentage points.</b>			\$9,710,944	52.3
	HR Solutions	Revolving Fund	\$38,286	0.1
	Merit System Accountability & Compliance	Salaries & Expenses	\$194,899	1.2
	OPM Human Resources	Salaries & Expenses	\$36,644	0.0
	OPM Human Resources	Trust Fund Annual	\$657,309	4.0
	OPM Human Resources	Common Services	\$8,783,806	47.0
<b>OPM Total</b>			<b>\$9,710,944</b>	<b>52.3</b>

Objective 2.2: Improve OPM’s relationships and standing as the human capital management thought leader. By 2026, increase the percent of CHCOs who strongly agree that OPM treats them as a strategic partner by 23 percentage points.

**Strategic Objective Owner:** Joanne Plasky, Group Manager of Agency Compliance and Evaluation-Central, MSAC

**Deputy Strategic Objective Owners:** Shelley Thomas, HR Specialist, ES; Meg Kays, Evaluation Officer, OCFO

**Strategies**

- Re-affirm OPM’s role for the administration of human capital management for all Federal agencies by providing leadership, guidance, and oversight
- Increase engagement with the CHCO Council to improve OPM’s standing as the human capital thought leader across the Federal Government
- Proactively utilize the press to educate and inform the Federal workforce, agencies, stakeholders, and the public of OPM initiatives and policies

**FY 2024 and FY 2025 Next Steps:**

Key Milestones	Implementing Organization(s)	Target Completion
Provide OPM legislative updates to CHCO Council	CLIA, CHCOC	FY 2024
Develop and pilot an "e-newsletter" to Federal human capital professionals and other stakeholders	WPI, MSAC, OCFO	FY 2024
Initiate three or more collaborations with academics to further research, evaluation, and/or policy development	OCFO	FY 2024
Identify high-priority conferences that OPM should attend and develop a calendar of these events	OCFO, OD, WPI	FY 2024
Release 1-2 priority reports (for example, special studies, research reports, evaluations, and case studies)	MSAC, OCFO, WPI	FY 2024
Develop OPM internal guidance for clearance, release, and publication of reports, journal articles, and other external communications	OCFO, OD, WPI, HRS	FY 2024
Present at four or more high-priority conferences	WPI, HRS, OCFO, MSAC, OC	FY 2025

Key Milestones	Implementing Organization(s)	Target Completion
Lead one or more roundtable discussions, conference meetings, or panel presentations on workforce research and case studies	WPI, MSAC, HRS, OCFO, OC	FY 2025

## Performance Measures

\_ \* No historical results.

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Percent of CHCOs indicating that OPM treats them as strategic partners	_ *	_ *	_ *	93.94%	90.63%	95.94%	96.00%
Percent of CHCOs who strongly agree that OPM treats them as strategic partners	_ *	_ *	_ *	27.27%	37.50%	39.27%	46.00%

Note: CHCOs are defined as the CHCOs and deputy CHCOs of the CHCO Act of 2002 agencies.

## Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Transform OPM’s organizational capacity and capability to better serve as the leader in Federal human capital management</b>				
<b>2.2 - Improve OPM’s relationships and standing as the human capital management thought leader. By FY 2026, increase the percent of CHCOs who strongly agree that OPM treats them as a strategic partner by 8 percentage points.</b>			<b>\$871,282</b>	<b>4.8</b>
	Workforce Policy and Innovation	Salaries & Expenses	\$26,000	0.0
	HR Solutions	Revolving Fund	\$12,272	0.1
	Merit System Accountability & Compliance	Salaries & Expenses	\$458,469	2.9
	Office of Communications	Salaries & Expenses	\$76,926	0.3
	Office of the Chief Financial Officer	Common Services	\$126,551	0.5
	Office of the Director	Advances & Reimbursements Annual	\$171,064	1.0
<b>OPM Total</b>			<b>\$871,282</b>	<b>4.8</b>

Objective 2.3: Improve OPM’s program efficacy through comprehensive risk management and contract monitoring across the agency. By FY 2026, achieve the OMB-set target for the percentage of spending under category management.

**Strategic Objective Owner:** Shreena Lyons Morris, Senior Procurement Executive, OPO

**Deputy Strategic Objective Owners:** Ed DeHarde, Deputy Associate Director, HI; Indu Garg, Human Capital Category Manager, HRS; James Craft, Senior Advisor, OCIO

**Strategies**

- Establish a disciplined enterprise acquisition planning process to drive cost efficiencies, reduce risk, and eliminate redundant procurements
- Improve OPM compliance with past performance reporting requirements by providing timely and meaningful feedback on contractor performance
- Improve OPM’s contract spend that is actively managed according to supply chain and category management principles

**FY 2024 and FY 2025 Next Steps:**

Key Milestones	Implementing Organization(s)	Target Completion
Execute training and guidance for Contracting Officer's Representatives	OPO, OCIO	FY 2024
Draft Strategic Sourcing Guidance for OPM-wide contract vehicles	OPO, OD	FY 2024
Reassess Enterprise Acquisition Policy	OPO	FY 2024
Refine Technology Business Management principles into Enterprise Acquisition Planning	OPO	FY 2024
Develop initial OPM-wide Supply Chain Risk Management Guidance	OPO, OCIO	FY 2024
Launch COR Community of Practice	OPO	FY 2024
Draft Supply Chain Management Training for CORs and PMs	OCIO	FY 2024
Draft Contracting Officers Representatives training and file management capabilities in the Procurement Center	OPO	FY 2024
Execute industry engagement activities aligned to acquisition planning	OPO, HRS	FY 2025

Key Milestones	Implementing Organization(s)	Target Completion
Develop strategic source vehicle mandate and plan for developing future vehicles to meet agency needs	OPO, HRS	FY 2025
Finalize Contracting Officer's Representatives training and file management capabilities in the Procurement Center	OPO, HRS	FY 2025

### Performance Measures

\_ \* No historical results.

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Percent of OPM's spend under management (SUM) (Cumulative)	_ *	_ *	_ *	94.34%	85.20%	95.00%	95.00%
Percent of contract actions in compliance with Government-wide past performance reporting requirements (Cumulative)	40.27%	47.73%	30.00%	51.90%	47.38%	70.00%	75.00%

Note: The percent of spend under management was previously measured as the percent of OMB targets achieved. The historical results are as follows: 256 percent (FY 2019), 96.1 percent (FY 2020), 51.1 percent (FY 2021). The measure definition changed in FY 2022. In FY 2023, OPM revised the FY 2024 and FY 2025 targets for measure 2.3.002, as the targets are no longer set by OMB.

### Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Transform OPM's organizational capacity and capability to better serve as the leader in Federal human capital management</b>				
<b>2.3 - Improve OPM's program efficacy through comprehensive risk management and contract monitoring across the agency. By FY 2026, achieve the OMB-set target for the percentage of spending under category management.</b>			\$1,170,188	4.8
	HR Solutions	Revolving Fund	\$499,557	2.0
	Office of Procurement Operations	Salaries & Expenses	\$328,101	1.4
	Office of Procurement Operations	Common Services	\$342,530	1.4
<b>OPM Total</b>			<b>\$1,170,188</b>	<b>4.8</b>

Objective 2.4: Establish a sustainable funding and staffing model for OPM that better allows the agency to meet its mission. By FY 2026, increase the percentage of OPM managers who indicate that they have sufficient resources to get their jobs done by 4 percentage points.

**Strategic Objective Owner:** Erica Roach, Chief Financial Officer, OCFO

**Deputy Strategic Objective Owners:** Melissa Ford, Acting Deputy Chief Financial Officer, OCFO; Jane Lee, Senior Advisor to the Director, OD

**Strategies**

- Implement a process and structure that enhances labor code management and reporting across the agency
- Leverage enhanced reporting and external studies to support future budget justifications
- Provide OPM supervisors and managers with educational materials about the budget formulation process, resource allocation, and execution
- Work with OMB and the Congress to identify alternative funding sources

**FY 2024 and FY 2025 Next Steps:**

Key Milestones	Implementing Organization(s)	Target Completion
Develop a business case to establish an OPM Working Capital Fund	OCFO	FY 2024
Develop a proposal for a management fee that allows OPM to administer earned benefit programs with mandatory funding as opposed to discretionary funds	OCFO	FY 2024
Conduct review of Revolving Fund statute and identify opportunities for assisting OPM programs with expanding reimbursable services	OCFO, OCIO	FY 2024
Increase Voluntary Early Retirement Authority and Voluntary Separation Incentive Payment fee collection efforts	OCFO	FY 2024
Execute an enterprise-wide communications campaign and create dashboards and reports to strengthen the ability of the agency to monitor resource utilization by OPM strategic objectives	OCFO	FY 2025

Key Milestones	Implementing Organization(s)	Target Completion
Execute annual program reviews to better support resource planning efforts	OCFO	FY 2025

## Performance Measures

\_ \* No historical results.

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Percent of OPM managers who indicate that they have sufficient resources to get their job done	54	_ *	_ *	_ *	54	56	57
Percent of OPM staff who indicate that they have sufficient resources to get their job done	62	_ *	_ *	_ *	63	65	66

Notes: FY 2020 - FY 2022 results for these measures are unavailable because the corresponding survey item was not included in the FY 2020 - FY 2022 OPM FEVS.

## Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Transform OPM’s organizational capacity and capability to better serve as the leader in Federal human capital management</b>				
<b>2.4 - Establish a sustainable funding and staffing model for OPM that better allows the agency to meet its mission. By FY 2026, increase the percentage of OPM managers who indicate that they have sufficient resources to get their jobs done by 4 percentage points.</b>			\$10,249,391	2.2
	Merit System Accountability & Compliance	Salaries & Expenses	\$46,866	0.2
	Office of the Chief Financial Officer	Salaries & Expenses	\$2,330,146	0.0
	Office of the Chief Financial Officer	Common Services	\$7,872,379	2.0
<b>OPM Total</b>			<b>\$10,249,391</b>	<b>2.2</b>



Objective 2.5: Modernize OPM IT by establishing an enterprise-wide approach, eliminating fragmentation, and aligning IT investments with core mission requirements. By FY 2026, increase the percentage of software projects implementing adequate incremental development to 95 percent.

**Strategic Objective Owner:** Guy Cavallo, Chief Information Officer, OCIO

**Deputy Strategic Objective Owners:** Shreena Lyons Morris, Senior Procurement Executive, OPO; Joe Powers, Associate Chief Information Officer, Enterprise Infrastructure Systems, OCIO; James Saunders, Chief Information Security Officer, OCIO; Larry Allen, Associate Chief Information Officer, OCIO

### Strategies

- Complete transition of ongoing IT operational support to Defense Counterintelligence Security Agency (DCSA)
- Analyze OPM's spending patterns, through the effective implementation of OMB's mandated Technology Business Management, to leverage its purchasing power through development and execution of strategic sourcing procurement vehicles and policies
- Improve IT governance processes to better align with modernization strategy and governmental best practices
- Conduct discovery sessions with programs to build a mutual understanding of current systems' capabilities and program offices' needs
- Evaluate IT systems for risk, consolidation, and modernization potential, developing an enterprise roadmap, and modernization timeline
- Upskill the workforce through cloud training and activities
- Improve agile software development and operations through adoption of best practices and tools
- Expand and leverage cloud services to enhance employee productivity and cybersecurity protections

FY 2024 and FY 2025 Next Steps:

Key Milestones	Implementing Organization(s)	Target Completion
Enhance and modernize OPM's IT security strategy and posture and educate stakeholders about their cybersecurity responsibilities	OCIO	FY 2024
Establish a governance structure and tools to provide feedback and transparency for IT spend in the agency	OCIO	FY 2024
Deploy capability and solutions using agile techniques and incremental development to reduce the time to deliver solutions	OCIO	FY 2024
Transition legacy IT systems and applications including mainframe applications to cloud technology and services	OCIO	FY 2024
Prepare and train OCIO and OPM users/stakeholders on modernized/digitalized/cloud technology and tools	OCIO	FY 2024
Conduct capability/technology discovery sessions and analyze technical alternatives with stakeholders and program offices	OCIO	FY 2024
Create user experience journey maps with stakeholders and program offices	OCIO	FY 2024
Review the engineering, security, privacy, and architecture for High Value Assets	OCIO, OESPIM	FY 2024
Develop Information Technology Strategic Sourcing or enterprise-wide contract vehicles and policies to reduce unmanaged agency spend and to maximize adoption	OCIO	FY 2024
Establish enterprise standards for technology purchases with consideration of the risk to supply chain, cybersecurity threats, and cost reduction	OCIO	FY 2024
Implement standards and practices to reduce the number of open IT audit findings and recommendations by at least 25 findings	OCIO	FY 2024
Transition legacy IT systems and applications, including mainframe applications, to cloud technology and services	OCIO, HRS	FY 2025
Complete the transfer of DCSA functions, including network and cybersecurity services	OCIO	FY 2025
Deploy the U.S. Postal Service Health Benefits System (including eligibility, enrollment, and decision support functionalities)	OCIO	FY 2025

Key Milestones	Implementing Organization(s)	Target Completion
Expand the use of chatbots and knowledge base capability to RS and other program offices to extend customer engagement	OCIO, HRS	FY 2025
Streamline OCIO technology review process by implementing a case management solution to track acquisitions and to produce the necessary approval document once cleared	OCIO	FY 2025

**Performance Measures**

\_ \* No historical results.

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Percent of software projects implementing adequate incremental development	100%	96.43%	85.17%	85.71%	100%	94%	95%
Score for utilization of the working capital fund to support IT modernization and security	2.00	2.00	2.00	3.00	4.00	2.87	4.00

Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Transform OPM’s organizational capacity and capability to better serve as the leader in Federal human capital management</b>				
<b>2.5 - Modernize OPM IT by establishing an enterprise-wide approach, eliminating fragmentation, and aligning IT investments with core mission requirements. By FY 2026, increase the percentage of software projects implementing adequate incremental development to 95 percent.</b>			<b>\$202,564,053</b>	<b>191.4</b>
	Office of the Chief Information Officer	Salaries & Expenses	\$15,429,849	42.0
	Office of the Chief Information Officer	IT Modernization S&E	\$10,710,000	0.0
	Office of the Chief Information Officer	Trust Fund Annual	\$27,187,929	11.0
	Office of the Chief Information Officer	Common Services	\$46,019,811	7.0
	Office of the Chief Information Officer	Revolving Fund	\$99,853,168	130.0
	Office of the Chief Information Officer	5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$3,075,000	0.0
	HR Solutions	Revolving Fund	\$288,295	1.4
<b>OPM Total</b>			<b>\$202,564,053</b>	<b>191.4</b>

Objective 2.6: Promote a positive organizational culture where leadership drives an enterprise mindset, lives the OPM values, and supports employee engagement and professional growth. By FY 2026, increase OPM’s Leaders Lead Score by 3 points.

**Strategic Objective Owner:** Katie Malague, Chief Management Officer, OD

**Deputy Strategic Objective Owner:** Carmen Garcia, HR Director and Chief Human Capital Officer; Lisa Loss, Associate Director, SuitEA

**Strategies**

- Increase leadership awareness of corporate citizenship and an enterprise-wide mindset and drive positive employee engagement
- Develop a set of guiding principles for an enterprise-wide leadership mindset
- Increase communication to employees focusing on the strategic goals and objectives
- Strengthen customer engagement with OPM system users and stakeholders during design, requirements, and testing phases to improve system quality and adoption
- Strengthen Diversity Equity Inclusion and Accessibility (DEIA) within OPM, addressing all aspects of the employee lifecycle

**FY 2024 and FY 2025 Next Steps:**

Key Milestones	Implementing Organization(s)	Target Completion
Refine enterprise-mindset success measures and develop a knowledge bank of enterprise-mindset leading practices	OD	FY 2024
Add elements of the strategic plan to recruitment or retention communications	OPM HR	FY 2024
Assess state of DEIA through data analysis	OPM HR, SuitEA, ODEIA	FY 2024
Transition existing customer experience efforts to a more formalized structure	OD	FY 2024
Execute the Employee Engagement action plan at the leadership level	OD, OPM HR	FY 2024
Establish dedicated DEIA (and other employee support) offices within OPM	OD	FY 2024

Key Milestones	Implementing Organization(s)	Target Completion
Build enterprise mindset principles into Executive and Supervisor training and development materials	OPM HR	FY 2024
Add elements to the strategic plan to recruitment or retention communications	OPM HR	FY 2024
Tie strategic objectives to critical elements in USA Performance	OPM HR	FY 2025
Assess changes in agency-wide employee engagement plan and program/office level measures and determine if additional changes are needed to those plans	OD, OPM HR, HCDMM, SuitEA	FY 2025

### Performance Measures

\_ \* No historical results.

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
OPM Leaders Lead score	61	64	69	68	72	70	71

### Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Transform OPM’s organizational capacity and capability to better serve as the leader in Federal human capital management</b>				
<b>2.6 - Promote a positive organizational culture where leadership drives an enterprise mindset, lives the OPM values, and supports employee engagement and professional growth. By FY 2026, increase OPM’s Leaders Lead Score by 3 points.</b>			\$916,757	3.0
	HR Solutions	Revolving Fund	\$57,429	0.2
	Suitability Executive Agent Programs	Revolving Fund	\$259,714	1.2
	OPM Human Resources	Salaries & Expenses	\$165,000	0.0
	OPM Human Resources	Common Services	\$256,130	1.0
	Human Capital Data Management and Modernization	Salaries & Expenses	\$24,927	0.1
	Human Capital Data Management and Modernization	Revolving Fund	\$153,557	0.6
<b>OPM Total</b>			<b>\$916,757</b>	<b>3.0</b>



**Strategic Goal 3: Create a human-centered customer experience by putting the needs of OPM’s customers at the center of OPM’s workforce services, policy, and oversight, increasing OPM’s customer satisfaction index score for targeted services to 4.3 out of 5**

**Performance Budget Request by Objective, Organization and Fund – All Resources**

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Create a human-centered customer experience by putting the needs of OPM’s customers at the center of OPM’s workforce services, policy, and oversight, increasing OPM’s customer satisfaction index score for targeted services to 4.3 out of 5</b>				
<b>3.1 - Enhance the Retirement Services customer experience by providing timely, accurate, and responsive service that addresses the diverse needs of OPM’s customers. By FY 2026, improve the customer satisfaction score to 4.2 out of 5.</b>			\$161,555,871	1,063.6
	Office of the Chief Information Officer	Trust Fund Annual	\$5,627,933	26.9
	Office of the Chief Information Officer	Revolving Fund	\$290,806	2.0
	Office of the Chief Information Officer	5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$224,437	1.1
	HR Solutions	Revolving Fund	\$134,556	0.5
	Merit System Accountability & Compliance	Salaries & Expenses	\$205,000	0.0
	Retirement Services	Trust Fund Annual	\$86,024,967	579.7
	Retirement Services	5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$67,865,557	446.4
	Retirement Services	FERCCA (P.L. 106-265) - Retirement	\$1,182,615	7.0
<b>3.2 - Create a personalized USAJOBS experience to help applicants find relevant opportunities. By FY 2026, improve applicant satisfaction to 4.1 out of 5 for the desktop platform and to 4.5 out of 5 for the mobile platform.</b>			\$32,572,019	28.1
	Office of the Chief Information Officer	Salaries & Expenses	\$9,845,846	0.0
	Office of the Chief Information Officer	Trust Fund Annual	\$71,750	0.0
	Office of the Chief Information Officer	Common Services	\$468,621	0.0
	Workforce Policy and Innovation	Salaries & Expenses	\$138,041	0.5



Strategic Objectives	Organization	Fund	Dollars	FTE
	HR Solutions	Revolving Fund	\$21,953,329	27.0
	Merit System Accountability & Compliance	Salaries & Expenses	\$94,432	0.6
<b>3.3 - Create a seamless customer and intermediary experience across OPM's policy, service, and oversight functions. By FY 2026, increase the average score for helpfulness of OPM human capital services in achieving human capital objectives to 4.5 out of 5.</b>			\$6,100,328	35.6
	Workforce Policy and Innovation	Salaries & Expenses	\$357,757	1.5
	HR Solutions	Revolving Fund	\$222,028	0.6
	Merit System Accountability & Compliance	Salaries & Expenses	\$5,358,914	32.6
	Merit System Accountability & Compliance	Trust Fund Annual	\$28,026	0.2
	Merit System Accountability & Compliance	Advances & Reimbursements No Year	\$59,973	0.4
	Human Capital Data Management and Modernization	Revolving Fund	\$73,630	0.3
<b>3.4 - Transform the OPM website to a user-centric and user-friendly website. By FY 2026, achieve an average effectiveness score of 4 out of 5.</b>			\$171,399	0.8
	HR Solutions	Revolving Fund	\$132,937	0.7
	Office of Communications	Salaries & Expenses	\$38,462	0.2
<b>OPM Total</b>			<b>\$200,399,617</b>	<b>1,128.1</b>

Objective 3.1: Enhance the Retirement Services customer experience by providing timely, accurate, and responsive service that addresses the diverse needs of OPM’s customers. By FY 2026, improve the customer satisfaction score to 4.2 out of 5.

**Strategic Objective Owner:** Nick Ashenden, Deputy Associate Director, RS

**Deputy Strategic Objective Owner:** Lori Amos, Deputy Associate Director, RS; MC Price, Associate Chief Information Officer, OCIO

**Strategies**

- Improve customer service delivery of Retirement Services personnel through training and continuous development
- Develop and upgrade user interfaces, modernize system components, and enhance data integration of Retirement Services systems to improve customer service
- Increase Agency Benefits Officers’ knowledge through training and collaboration for a seamless transition from their agency to OPM
- Strengthen customer engagement with annuitants to enhance the customer experience

**FY 2024 and FY 2025 Next Steps:**

Key Milestones	Implementing Organization(s)	Target Completion
Complete a curriculum for advanced Retirement Services courses for Retirement Services personnel	RS	FY 2024
Implement digital file system minimally viable product	OCIO, RS	FY 2024
Implement plan to engage agency benefits officers to improve the communication of the retirement application process and identify training needs	RS, HRS	FY 2024
Implement digital annuity booklet	RS, OCIO	FY 2025
Deliver minimum routine operations and maintenance for Online Retirement Application	RS	FY 2025
Deliver minimum routine operations and maintenance for the Digital File System initiative	RS	FY 2025

## Performance Measures

\_ \* No historical results

^ In FY 2019, only Q3 and Q4 data was available.

† In FY 2020, only Q1, Q3, and Q4 data was available.

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Average number of minutes to answer phone calls (Cumulative)	_ *	_ *	_ *	31.02	45.80	15.00	15.00
Average number of days to process retirement cases	55.70	68.50	78.96	88.41	77.38	60.00	60.00
Average satisfaction score for services received from Retirement Services	4.10 <sup>^</sup>	4.12 <sup>†</sup>	3.92	3.74	3.45	4.10	4.15

## Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Create a human-centered customer experience by putting the needs of OPM’s customers at the center of OPM’s workforce services, policy, and oversight, increasing OPM’s customer satisfaction index score for targeted services to 4.3 out of 5</b>				
<b>3.1 - Enhance the Retirement Services customer experience by providing timely, accurate, and responsive service that addresses the diverse needs of OPM’s customers. By FY 2026, improve the customer satisfaction score to 4.2 out of 5.</b>			<b>\$161,555,871</b>	<b>1,063.6</b>
	Office of the Chief Information Officer	Trust Fund Annual	\$5,627,933	26.9
	Office of the Chief Information Officer	Revolving Fund	\$290,806	2.0
	Office of the Chief Information Officer	5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$224,437	1.1
	HR Solutions	Revolving Fund	\$134,556	0.5
	Merit System Accountability & Compliance	Salaries & Expenses	\$205,000	0.0
	Retirement Services	Trust Fund Annual	\$86,024,967	579.7
	Retirement Services	5 U.S.C. § 8348 (a)(1)(B) - Retirement	\$67,865,557	446.4
	Retirement Services	FERCCA (P.L. 106-265) - Retirement	\$1,182,615	7.0
<b>OPM Total</b>			<b>\$161,555,871</b>	<b>1,063.6</b>

**Objective 3.2:** Create a personalized USAJOBS experience to help applicants find relevant opportunities. By FY 2026, improve applicant satisfaction to 4.1 out of 5 for the desktop platform and to 4.5 out of 5 for the mobile platform.

**Strategic Objective Owner:** Erika Vega, Deputy Associate Director, HRS

**Deputy Strategic Objective Owner:** MC Price, Associate Chief Information Officer, OCIO

**Strategies**

- Conduct end-to-end user research on the applicant experience to drive development priorities and make USAJOBS refinements to improve satisfaction
- Increase stakeholder access to USAJOBS data to drive improvements to the Federal hiring process
- Collaborate with GSA’s login.gov team to improve the USAJOBS authentication experience
- Implement USAJOBS IT modernization efforts to leverage technology and process advancements
- Improve USAJOBS Voice of Customer sourcing and support mechanisms

**FY 2024 and FY 2025 Next Steps:**

Key Milestones	Implementing Organization(s)	Target Completion
Implement improvements to the seeker search experience	HRS, OCIO	FY 2024
Upgrade the resume builder features	HRS, OCIO	FY 2024
Conduct pilots and fully implement career exploration features that leverage data insights	HRS, OCIO, WPI	FY 2024
Develop an agency evaluation approach to leverage qualitative and quantitative data to improve the customer experience	HRS, OCIO	FY 2024
Implement authentication enhancements based on user feedback	HRS, OCIO	FY 2024
Finalize the business case to move USAJOBS to the cloud	HRS, OCIO	FY 2024
Drive improvements to better integrate Open Opportunities with USAJOBS	HRS, OCIO	FY 2024
Expand the USAJOBS video series	HRS	FY 2024
Conduct a comprehensive accessibility audit to establish baseline accessibility, inclusivity, and equity standards and performance measures across job seeker user groups	HRS, OCIO	FY 2025

Key Milestones	Implementing Organization(s)	Target Completion
Evaluate the effectiveness of the similar jobs machine learning feature in presenting jobs to seekers that they find relevant as part of their job search	HRS, OCIO	FY 2025
Implement an external-facing job trends dashboard to increase the availability of job trends information for agencies and recruiters to optimize recruitment efforts	HRS, OCIO	FY 2025
Define the requirements for self-service customizable dashboards and reports so agencies can more easily access data to conduct analyses	HRS, OCIO, MSAC	FY 2025
Conduct an evaluation of enhancements made to improve the Login.gov authentication experience	HRS, OCIO	FY 2025
Rebuild the USAJOBS self-service online Help Centers in the OPM enterprise Content Management Solution to improve performance and allow for enhancements and updates that meet users' needs	HRS, OCIO	FY 2025
Expand and enhance recruitment features, such as Resume Mining, Talent Pools, Talent Programs, and Talent Networks, available through the Agency Talent Portal to connect agencies with qualified candidates	HRS, OCIO, WPI	FY 2025
Evaluate plain language across USAJOBS products to create strategies for improving and extending plain language in ways that address end users' needs and enhance existing products	HRS, OCIO, WPI, MSAC	FY 2025
Expand Voice of the Customer activities to further personalize the USAJOBS experience to help job applicants find the right opportunity	HRS, OCIO	FY 2025

## Performance Measures

\_ \* No historical results

^ In FY 2023, only Q1, Q3, and Q4 data was available.

Performance Measures	FY 2019	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025
	Result	Result	Result	Result	Result	Target	Target
Average overall satisfaction score with USAJOBS (desktop)	_ *	_ *	3.87	3.88	3.93^	3.99	4.04
Average ease score (desktop)	_ *	_ *	3.74	3.76	3.78^	3.80	3.83
Average efficiency score (desktop)	_ *	_ *	3.74	3.78	3.81^	3.80	3.83
Average transparency score (desktop)	_ *	_ *	4.16	4.18	4.31^	4.20	4.22

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Average website helpfulness score (desktop)	_*	_*	3.84	3.84	3.86^	3.90	3.94
Average trust score (desktop)	_*	_*	3.75	3.74	3.79^	3.80	3.83
Average effectiveness score (desktop)	_*	_*	3.77	3.78	3.78^	3.81	3.84
Average overall satisfaction score with USAJOBS (mobile)	_*	_*	4.21	4.23	4.16^	4.27	4.38
Average trust score (mobile)	_*	_*	4.11	4.13	4.09^	4.18	4.23
Average effectiveness score (mobile)	_*	_*	4.11	4.14	4.04^	4.17	4.22
Average ease score (mobile)	_*	_*	4.09	4.12	4.06^	4.15	4.19
Average efficiency score (mobile)	_*	_*	4.08	4.09	4.01^	4.09	4.12
Average transparency score (mobile)	_*	_*	4.39	4.37	4.38^	4.45	4.48
Average website helpfulness score (mobile)	_*	_*	4.14	4.16	4.10^	4.20	4.22

Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Create a human-centered customer experience by putting the needs of OPM’s customers at the center of OPM’s workforce services, policy, and oversight, increasing OPM’s customer satisfaction index score for targeted services to 4.3 out of 5</b>				
<b>3.2 - Create a personalized USAJOBS experience to help applicants find relevant opportunities. By FY 2026, improve applicant satisfaction to 4.1 out of 5 for the desktop platform and to 4.5 out of 5 for the mobile platform.</b>			\$32,572,019	28.1
	Office of the Chief Information Officer	Salaries & Expenses	\$9,845,846	0.0
	Office of the Chief Information Officer	Trust Fund Annual	\$71,750	0.0
	Office of the Chief Information Officer	Common Services	\$468,621	0.0
	Workforce Policy and Innovation	Salaries & Expenses	\$138,041	0.5
	HR Solutions	Revolving Fund	\$21,953,329	27.0
	Merit System Accountability & Compliance	Salaries & Expenses	\$94,432	0.6
<b>OPM Total</b>			<b>\$32,572,019</b>	<b>28.1</b>

**Objective 3.3: Create a seamless customer and intermediary experience across OPM’s policy, service, and oversight functions. By FY 2026, increase the average score for helpfulness of OPM human capital services to 4.5 out of 5.**

**Strategic Objective Owner:** Ana Mazzi, Principal Deputy Associate Director, MSAC

**Deputy Strategic Objective Owners:** Reggie Brown, Principal Deputy Associate Director, HRS

**Strategies**

- Establish a customer experience infrastructure with the organizational power to coordinate agency efforts to create consistent, shared language, goals, and measures around customer experience, with the influence to require adherence
- Promote collaboration across programs when developing and issuing policy and providing guidance and services to agencies in a timely fashion
- Review and modify oversight evaluation methodology to incorporate strategic, data-driven, and performance-oriented evaluations that focus on Government-wide, systemic issues
- Create blended interpretation, technical assistance, consulting, learning, and oversight product and service offerings to meet agency needs across the talent lifecycle
- Deliver strategic support and guidance to agencies that are part of an expected, comprehensive catalog of services OPM typically provides

**FY 2024 and FY 2025 Next Steps:**

Key Milestones	Implementing Organization(s)	Target Completion
Pilot HR Data and digital products (e.g., "My Insights") for HR practitioners and employees to use	HCDMM, WPI, HRS	FY 2024
Develop a process to identify opportunities for cross-collaborative guidance, support, and service for future surge hiring initiatives	WPI, HRS, MSAC	FY 2024
Revise Succession Management Guide	WPI, MSAC, HRS	FY 2024
Develop a Merit System Principles Maturity Model	MSAC, WPI, HRS, RS	FY 2024
Review and provide agency feedback for the Human Capital Operating Plans	MSAC, WPI	FY 2024

Key Milestones	Implementing Organization(s)	Target Completion
Refine and expand "Plan Do Check" model to include additional externally-facing OPM organizations to enhance agency customer experience	MSAC, WPI, HRS, HCDMM	FY 2025
Develop a tool to assess agency maturity in Merit System Principles through a maturity model and standards	MSAC, WPI	FY 2025

## Performance Measures

\_ \* No historical results

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Average score for helpfulness of OPM human capital services in achieving human capital objectives	_ *	_ *	4.31	4.42	4.38	4.46	4.48

Note: This measure was previously tracked as percent of users throughout Government who agree that OPM human capital services are helpful in achieving their human capital objectives. The result for FY 2019 was 87.4 percent and the FY 2020 result was 92.5 percent.

## Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Create a human-centered customer experience by putting the needs of OPM’s customers at the center of OPM’s workforce services, policy, and oversight, increasing OPM’s customer satisfaction index score for targeted services to 4.3 out of 5</b>				
<b>3.3 - Create a seamless customer and intermediary experience across OPM’s policy, service, and oversight functions. By FY 2026, increase the average score for helpfulness of OPM human capital services in achieving human capital objectives to 4.5 out of 5.</b>			\$6,100,328	35.6
	Workforce Policy and Innovation	Salaries & Expenses	\$357,757	1.5
	HR Solutions	Revolving Fund	\$222,028	0.6
	Merit System Accountability & Compliance	Salaries & Expenses	\$5,358,914	32.6
	Merit System Accountability & Compliance	Trust Fund Annual	\$28,026	0.2
	Merit System Accountability & Compliance	Advances & Reimbursements No Year	\$59,973	0.4
	Human Capital Data Management and Modernization	Revolving Fund	\$73,630	0.3
<b>OPM Total</b>			<b>\$6,100,328</b>	<b>35.6</b>



**Objective 3.4: Transform the OPM website to a user-centric and user-friendly website. By FY 2026, achieve an average effectiveness score of 4 out of 5.**

**Strategic Objective Owner:** Rina Shah, Senior Advisor for Transformation, Office of the Deputy Director

**Deputy Strategic Objective Owners:** Melvin Brown, Principal Deputy Chief Information Officer, OCIO; Laura Goulding, Deputy Director, OC

**Strategies**

- Strengthen customer engagement with OPM stakeholders during design, requirements development, and testing to improve system quality and adoption
- Create an OPM Digital Governance Board to advance the creation, maintenance, and update of digital tools across the agency
- Increase employee education on human-centered design principles, plain language, privacy, and accessibility to facilitate the creation of clear and consistent website program content and digital tools
- Use human-centered design principles to create a site that is designed for external customers (rather than for OPM program offices), helps customers efficiently obtain the information they need, and creates opportunities for feedback
- Migrate to a cloud hosted OPM.gov platform to allow for elasticity as demand increases or decreases, delivering a positive customer experience during peak usage
- Implement a modern content management platform to more easily update and maintain the content on OPM.gov
- Establish a unified approach to the development and maintenance of web content

**FY 2024 and FY 2025 Next Steps**

Key Milestones	Implementing Organization(s)	Target Completion
Onboard OPM.gov development and customer experience teams	OCIO, RS, HRS	FY 2024
Implement OPM.gov minimum viable product in Enterprise Cloud Environment to provide program offices more direct control over their own content	OCIO, OC, RS, OESPIM	FY 2024

Key Milestones	Implementing Organization(s)	Target Completion
Conduct regular iterative testing of OPM.gov design with users to solicit feedback for specific features and future design	OCIO, RS, OESPIM	FY 2024
Release new OPM.gov site at full operational capability	OD, OC, OCIO	FY 2025

### Performance Measures

\* No historical results

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Average effectiveness score	*	*	*	*	*	Establish Baseline	Establish Baseline+ .1
Average ease score	*	*	*	*	*	Establish Baseline	Establish Baseline+ .1

Note: In FY 2023, OPM did not administer an OPM.gov customer experience survey. OPM began deployment of a new OPM.gov survey in FY 2024, the results of which OPM plans to publish in the next report.

### Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Create a human-centered customer experience by putting the needs of OPM’s customers at the center of OPM’s workforce services, policy, and oversight, increasing OPM’s customer satisfaction index score for targeted services to 4.3 out of 5</b>				
<b>3.4 - Transform the OPM website to a user-centric and user-friendly website. By FY 2026, achieve an average effectiveness score of 4 out of 5.</b>			\$171,399	0.8
	HR Solutions	Revolving Fund	\$132,937	0.7
	Office of Communications	Salaries & Expenses	\$38,462	0.2
<b>OPM Total</b>			<b>\$171,399</b>	<b>0.8</b>



**Strategic Goal 4: Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points**

Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points</b>				
<b>4.1 - Foster a culture of creativity and innovation within OPM. By FY 2026, increase the percentage of employees who agree that innovation is valued by 4 points.</b>			\$1,000,450	3.7
	HR Solutions	Revolving Fund	\$1,000,450	3.7
<b>4.2 - Increase focus on Government-wide policy work by shifting more low-risk delegations of authorities to agencies.</b>			\$2,109,902	12.1
	Congressional, Legislative and Intergovernmental Affairs	Salaries & Expenses	\$242,437	1.0
	Workforce Policy and Innovation	Salaries & Expenses	\$71,225	0.3
	Merit System Accountability & Compliance	Salaries & Expenses	\$1,496,373	9.3
	Merit System Accountability & Compliance	Trust Fund Annual	\$28,026	0.2
	Merit System Accountability & Compliance	Advances & Reimbursements No Year	\$59,973	0.4
	Suitability Executive Agent Programs	Revolving Fund	\$211,868	0.9
<b>4.3 - Expand the quality and use of OPM’s Federal human capital data. By FY 2026, increase the percentage of CHCO survey respondents who agree that OPM provides agencies with high quality workforce data and information to be used in decision-making by 20 percentage points.</b>			\$41,264,938	57.4
	Workforce Policy and Innovation	Salaries & Expenses	\$1,280,018	6.0
	HR Solutions	Revolving Fund	\$2,341,035	6.1
	Human Capital Data Management and Modernization	Salaries & Expenses	\$8,890,319	21.7

Strategic Objectives	Organization	Fund	Dollars	FTE
	Human Capital Data Management and Modernization	Revolving Fund	\$28,753,566	23.6
4.4 - Improve OPM's ability to provide strategic human capital management leadership to agencies through expansion of innovation, pilots, and identification of best practices across Government. By FY 2026, provide Federal agencies with 25 best practices.			\$6,209,549	30.1
	Workforce Policy and Innovation	Salaries & Expenses	\$1,059,722	4.5
	HR Solutions	Revolving Fund	\$3,866,135	18.6
	Merit System Accountability & Compliance	Salaries & Expenses	\$849,193	4.9
	Merit System Accountability & Compliance	Trust Fund Annual	\$28,026	0.2
	Merit System Accountability & Compliance	Advances & Reimbursements No Year	\$59,973	0.4
	Office of the Chief Financial Officer	Common Services	\$82,770	0.5
	Human Capital Data Management and Modernization	Salaries & Expenses	\$263,730	1.0
4.5 - Revamp OPM's policy-making approach to be proactive, timely, systematic, and inclusive. By FY 2026, increase the percent of CHCOs who agree that OPM's policy approach is responsive to agency needs by 8 percentage points.			\$851,243	4.0
	Workforce Policy and Innovation	Salaries & Expenses	\$313,491	1.3
	Office of the Executive Secretariat, Privacy, and Information Management	Salaries & Expenses	\$385,378	1.8
	Office of the Chief Financial Officer	Common Services	\$152,374	1.0
4.6 - Streamline Federal human capital regulations and guidance to reduce administrative burden and promote innovation while upholding merit system principles. By FY 2026, improve CHCO agreement that human capital policy changes resulted in less administrative burden to agencies by 8 percentage points.			\$1,567,665	8.5
	Workforce Policy and Innovation	Salaries & Expenses	\$483,187	2.0
	Merit System Accountability & Compliance	Salaries & Expenses	\$825,415	4.9
	Merit System Accountability & Compliance	Trust Fund Annual	\$28,026	0.2
	Merit System Accountability & Compliance	Advances & Reimbursements No Year	\$59,973	0.4
	Office of the Director	Advances & Reimbursements Annual	\$171,064	1.0
<b>OPM Total</b>			<b>\$53,003,747</b>	<b>115.6</b>

Objective 4.1: Foster a culture of creativity and innovation within OPM. By FY 2026, increase the percentage of employees who agree that creativity and innovation are valued by 4 points.

**Strategic Objective Owner:** Tiffany Worthy, Senior Advisor to the Director, OD

**Deputy Strategic Objective Owners:** John Gill, Executive Director, HCDMM; Arianne Miller, Managing Director, the Lab, HRS

**Strategies**

- Build leader mindsets, skills, and behaviors that foster innovation in offices, including senior leaders’ abilities to model professional vulnerability, risks, failures, and lessons learned
- Design forums that encourage cross-organizational communication and collaboration where OPM employees can interact with others and learn from creative leaders
- Reward or recognize employees and teams for innovation and creativity in a manner that celebrates attempts and positive outcomes

**FY 2024 and FY 2025 Next Steps:**

Key Milestones	Implementing Organization(s)	Target Completion
Host second training session on innovation/transformation to senior leaders	OD	FY 2024
Implement learning communities and/or cross-organizational forums	HRS, OD	FY 2024
Assess recognition structures in consultation with the Principal Deputy Associate Directors	OD	FY 2024
Introduce the OPM Innovation in Service Delivery Program	HRS	FY 2024
Offer content and resources related to innovation, human-centered design, service design, and other similar topics for usage in OPM's centrally managed learning programs and resources for OPM leaders, managers, supervisors, and staff	OD, CHCOC, MSAC	FY 2025
Pilot an OPM learning community focused on innovation	OD	FY 2025
Build evidence and lessons-learned from the Innovation in Service Delivery Design Program	HRS	FY 2025

## Performance Measures

\_ \* No historical results

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
OPM Innovation score	_*	_*	_*	67.22	71.37	70.22	76.22
Percent of OPM leaders trained in innovation techniques (Cumulative)	_*	_*	_*	6.67%	21.66%	10.43%	14.63%

Notes: OPM corrected the FY 2022 result for the measure “Percent of OPM leaders trained in innovation techniques” from 6.74 percent to 6.67 percent in May 2023.

## Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points</b>				
<b>4.1 - Foster a culture of creativity and innovation within OPM. By FY 2026, increase the percentage of employees who agree that innovation is valued by 4 points.</b>			\$1,000,450	3.7
	<b>HR Solutions</b>	<b>Revolving Fund</b>	\$1,000,450	3.7
<b>OPM Total</b>			<b>\$1,000,450</b>	<b>3.7</b>

**Objective 4.2: Increase focus on Government-wide policy work by shifting more low-risk delegations of authorities to agencies.**

**Strategic Objective Owner:** Mark Lambert, Associate Director, MSAC

**Deputy Strategic Objective Owners:** Lisa Loss, Associate Director, SuitEA; Allison Kidd-Miller, Deputy General Counsel, OGC

**Strategies**

- Identify maximum number of low-risk transactional activities for which OPM is responsible that are appropriate for delegation to agencies, and delegate those that can be done administratively
- Collaborate with OMB and Congress to enact legislation to authorize OPM to delegate to agencies low-risk transactions that Congress authorized only OPM to carry out and OPM identified as appropriate for agencies to do
- Provide agencies guidance and optimal training to use in exercising delegations
- Evaluate agency use and compliance with laws, regulations, policies/procedures, and merit system principles

**FY 2024 and FY 2025 Next Steps:**

\* Delayed milestone carried over from a previous fiscal year

Key Milestones	Implementing Organization(s)	Target Completion
Conduct virtual or in-person “road shows” related to new delegations	WPI, MSAC, SuitEA	FY 2024
Develop and deliver a webinar and Federal HR Institute training for agencies*	WPI, MSAC, SuitEA	FY 2024
Obtain OPM clearance of additional proposed legislation	WPI, MSAC, SuitEA	FY 2024
Submit additional draft legislation to OMB for interagency review and comment	WPI, MSAC, SuitEA	FY 2024
Submit additional draft legislation to the Congress for review, sponsor, and enact*	WPI, MSAC, SuitEA, CLIA	FY 2024
Develop and deliver a webinar and Federal HR Institute training for agencies on delegated authorities	WPI, MSAC, SuitEA, CLIA, CHCOC	FY 2025



Key Milestones	Implementing Organization(s)	Target Completion
Obtain OPM clearance of additional proposed legislation	WPI, MSAC, SuitEA,	FY 2025
Submit additional draft legislation to OMB for interagency review and comment	WPI, MSAC, SuitEA, CLIA	FY 2025
Submit draft legislation to Congress for review, to sponsor, and enact	WPI, MSAC, SuitEA, CLIA	FY 2025
Conduct information sessions related to new delegations	WPI, MSAC, SuitEA, CLIA, CHCOC	FY 2025

**Performance Measures**

\_ \* No historical results

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Percent of low-risk delegations with errors identified through OPM or agency led evaluations	_ *	_ *	_ *	_ *	_ *	Establish Baseline	Establish Baseline + 3 percentage points
Percent of CHCOs who agree that OPM provides appropriate delegations to agencies	_ *	_ *	_ *	48.48%	46.88%	49.00%	51.50%
Percent of low-risk delegations granted to agencies (Cumulative)	_ *	_ *	_ *	10.00%	20.00%	30.00%	40.00%

Note: OPM revised the FY 2024 target for the measure “Percent of CHCOs who agree that OPM provides appropriate delegations to agencies” in June 2023.

Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points</b>				
<b>4.2 - Increase focus on Government-wide policy work by shifting more low-risk delegations of authorities to agencies.</b>			\$2,109,902	12.1
	<b>Congressional, Legislative and Intergovernmental Affairs</b>	<b>Salaries &amp; Expenses</b>	\$242,437	1.0
	<b>Workforce Policy and Innovation</b>	<b>Salaries &amp; Expenses</b>	\$71,225	0.3
	<b>Merit System Accountability &amp; Compliance</b>	<b>Salaries &amp; Expenses</b>	\$1,496,373	9.3
	<b>Merit System Accountability &amp; Compliance</b>	<b>Trust Fund Annual</b>	\$28,026	0.2
	<b>Merit System Accountability &amp; Compliance</b>	<b>Advances &amp; Reimbursements No Year</b>	\$59,973	0.4
	<b>Suitability Executive Agent Programs</b>	<b>Revolving Fund</b>	\$211,868	0.9
<b>OPM Total</b>			<b>\$2,109,902</b>	<b>12.1</b>

Objective 4.3: Expand the quality and use of OPM’s Federal human capital data. By 2026, increase the percentage of CHCO survey respondents who agree that OPM provides agencies with high quality workforce data and information to be used in decision-making by 20 percentage points.

**Strategic Objective Owner:** Craig Gagel, Supervisory Program Analyst, HCDMM

**Deputy Strategic Objective Owners:** Cynthia Clinton-Brown, Deputy Chief Data Officer, HCDMM

**Strategies:**

- Develop and advance an OPM enterprise data strategy using the Federal Data Strategy framework
- Advance data quality, timeliness, and accessibility of key data assets to internal and external customers
- Upgrade user interfaces, two-way data integration, and other capabilities of priority systems
- Expand accessibility of HR analytics via reports, tools and services that support critical external customer decision making for talent needs
- Build and expand OPM’s capacity to use advanced analytical tools and methods like Artificial Intelligence and Machine Learning in support of customer goals
- Improve OPM-wide data governance, including data privacy considerations, across all critical data efforts
- Develop the Human Capital Federal Information Business Framework and Human Capital Information Model to provide standardized human capital lifecycle functional, operational, and data components to the extent possible

**FY 2024 and FY 2025 Next Steps:**

Key Milestones	Implementing Organization(s)	Target Completion
Publish new, high-value data sets to the Application Programming Interface data gateway	HCDMM, WPI, HRS, OESPIM	FY 2024
Modernize eOPF platform to deliver better customer interface and enable more efficient processing at key “moments that matter”*	HCDMM, WPI	FY 2024

Key Milestones	Implementing Organization(s)	Target Completion
Pilot a machine learning model related to the Federal hiring process*	HRS	FY 2024
Finalize policies to govern internal and external data use that addresses access, use, privacy and security and ethical approaches for Artificial Intelligence*	OESPIM, HCDMM	FY 2024
Complete development of cloud-based data science environment at OPM*	OCIO	FY 2024
Establish a plan for EHRI payroll data quality improvements	HCDMM, WPI, OEPSIM	FY 2024
Update Federal Executive Core Qualification framework to include data fluency	WPI, HCDMM	FY 2025
Complete revamp of key position descriptions to include data skills	HCDMM	FY 2025
Meet FY 2025 data professional hiring targets	HCDMM	FY 2025
Complete migration of OPM human capital data into cloud enterprise analytics platform	HCDMM	FY 2025
Develop a common data model for Electronic Official Personnel Folder and Enterprise Human Resources Integration	HCDMM	FY 2025
Complete phase one of Universal Employee ID implementation	HCDMM	FY 2025
Establish a performance management framework for the HR Quality Services Management Office marketplace for Shared Service Providers	HCDMM	FY 2025
Integrate HRS' Federal human capital data and services into OPM's planned enterprise data analytics platform and service delivery model	HRS	FY 2025

Note: OPM updated the milestone “implement EHRI data quality improvements” to “establish a plan for EHRI payroll data quality improvements” in FY 2024.

## Performance Measures

\_ \* No historical results

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Percent of CHCOs who agree that OPM provides agencies with high quality workforce data and information for decision-making	_ *	_ *	_ *	54.55%	56.67%	65.00%	70.00%
Average quarterly number of users of OPM's publicly available human capital dashboards	_ *	_ *	_ *	_ *	4441.00	139.43	7500.00
Average quarterly number of authenticated users of OPM's human capital dashboards	_ *	_ *	_ *	67.67	140.25	74.44	500.00

Notes: CHCOs are defined as the CHCOs and deputy CHCOs of the CHCO Act of 2002 agencies. In FY 2023, OPM revised the FY 2025 target, definition, calculation method, and historical results for measure 4.3.002 due to changes to the measurement process. Data is not available for the first, second, or third quarters of FY 2023. For measure 4.3.003, the reported result for FY 2022 is the quarterly average for quarters one, three, and four. Data is not available for the second quarter of FY 2022. In FY 2024, OPM revised the definition for measure 4.3.003 to clarify the user type (authenticated) included in the calculation and updated the FY 2025 target.

## Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points</b>				
<b>4.3 - Expand the quality and use of OPM's Federal human capital data. By FY 2026, increase the percentage of CHCO survey respondents who agree that OPM provides agencies with high quality workforce data and information to be used in decision-making by 20 percentage points.</b>			\$41,264,938	57.4
	<b>Workforce Policy and Innovation</b>	<b>Salaries &amp; Expenses</b>	\$1,280,018	6.0
	<b>HR Solutions</b>	<b>Revolving Fund</b>	\$2,341,035	6.1
	<b>Human Capital Data Management and Modernization</b>	<b>Salaries &amp; Expenses</b>	\$8,890,319	21.7
	<b>Human Capital Data Management and Modernization</b>	<b>Revolving Fund</b>	\$28,753,566	23.6
<b>OPM Total</b>			<b>\$41,264,938</b>	<b>57.4</b>

Objective 4.4: Improve OPM’s ability to provide strategic human capital management leadership to agencies through expansion of innovation, pilots, and identification of leading practices across Government. By FY 2026, provide Federal agencies with 25 leading practices.

**Strategic Objective Owner:** Sara Saphos, Senior Program Analyst, ES

**Deputy Strategic Objective Owners:** Arianne Miller, Managing Director, the Lab, HRS; Joanne Plasky, Manager, MSAC

**Strategies:**

- Identify key human capital strategies through research and successful practices that support improvements across the human capital management lifecycle, which may include creating or amending policy and developing or amending guidance
- Improve the visibility and highlight the value of research programs and demonstration projects to boost Federal agencies’ awareness of these options
- Identify best practices across Government and create a repository of best practices for agencies to access on a designated portal

**FY 2024 and FY 2025 Next Steps:**

Key Milestones	Implementing Organization(s)	Target Completion
Expand the use of the leading practices portal to include additional human capital management areas	WPI, MSAC, HRS	FY 2024
Conduct a series of four events to share leading practices with agencies	WPI, MSAC, HRS, OCFO	FY 2024
Identify human capital management pilots and track pilot status and results	WPI, MSAC, HRS, HCDMM	FY 2024
Establish a Center for Innovation in Federal Talent to work with agencies on pilots, demonstration projects, and innovation sprints	WPI	FY 2024
Develop standards for human capital workflows	HCDMM	FY 2024
Establish a community of practice for agencies looking to automate human capital workflows	HCDMM	FY 2024
Distinguish between pilots and demos, and draft and share guidance with agencies	WPI, MSAC, HRS, HCDMM, OCFO	FY 2024

Key Milestones	Implementing Organization(s)	Target Completion
Execute joint business case agreements with Federal Shared Service Providers to stand up and operationalize the HR Quality Services Management Office Marketplace*	HCDMM	FY 2024
Expand the HR QSMO Marketplace operations to include a broad range of Federal human capital products and services offered by commercial and Government providers	HCDMM	FY 2025
Share the descriptions and impacts of leading practices and innovative efforts for use in agency and stakeholders communications conducted in support of OPM and administration strategic priorities	OC, OD, WPI, MSAC, HRS, HCDMM, CHCOC, CLIA	FY 2025
Establish self-service access that allows agency HR practitioners to explore leading practices and innovative human capital management ideas using an OPM-created tool or website	WPI, MSAC, HRS, HCDMM, OCIO	FY 2025
Develop a guide for conducting pilots	WPI, MSAC, HCDMM, OCFO	FY 2025
Conduct research on agencies that are leading in key areas	WPI, MSAC, HRS, HCDMM, OCFO	FY 2025
Capture case studies of successful workflows for adoption	HCDMM	FY 2025

**Performance Measures**

\_ \* No historical results

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Number of leading practices shared with Federal agencies	_ *	_ *	_ *	9	25	5	8

Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points				
<b>4.4 - Improve OPM’s ability to provide strategic human capital management leadership to agencies through expansion of innovation, pilots, and identification of best practices across Government. By FY 2026, provide Federal agencies with 25 best practices.</b>			\$6,209,549	30.1
	Workforce Policy and Innovation	Salaries & Expenses	\$1,059,722	4.5
	HR Solutions	Revolving Fund	\$3,866,135	18.6
	Merit System Accountability & Compliance	Salaries & Expenses	\$849,193	4.9
	Merit System Accountability & Compliance	Trust Fund Annual	\$28,026	0.2
	Merit System Accountability & Compliance	Advances & Reimbursements No Year	\$59,973	0.4
	Office of the Chief Financial Officer	Common Services	\$82,770	0.5
	Human Capital Data Management and Modernization	Salaries & Expenses	\$263,730	1.0
<b>OPM Total</b>			<b>\$6,209,549</b>	<b>30.1</b>



Objective 4.5: Revamp OPM’s policy-making approach to be proactive, timely, systematic, and inclusive. By FY 2026, increase the percent of CHCOs who agree that OPM’s policy approach is responsive to agency needs by 8 percentage points.

**Strategic Objective Owner:** Steve Hickman, Deputy Executive Secretary, OD

**Deputy Strategic Objective Owners:** Margot Conrad, Deputy Chief of Staff, Office of the Director; Allison Kidd-Miller, Deputy General Counsel, OGC

**Strategies:**

- Engage agency partners and stakeholders to collect input for the development of policies in human capital areas
- Develop processes to streamline internal OPM clearance
- Expand the agency’s overall competencies in regulatory development and analysis
- Empower a team led by a senior official(s) to track and coordinate policy development across OPM
- Systematize OPM’s ability to collect input from stakeholders and use evidence to inform and evaluate policy prioritization, development, and implementation
- Build higher level relationships between OPM leadership and leadership of other agencies and the White House to understand core talent priorities and concerns
- Strengthen OPM’s capacity to increase awareness and understanding of OPM policies and programs among key stakeholders and customers

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**FY 2024 and FY 2025 Next Steps:**

\* Delayed milestone carried over from a previous fiscal year

Key Milestones	Implementing Organization(s)	Target Completion
Develop internal Customer Relationship Management capabilities to fully track requests that are received to develop responses and new/updated policy	WPI	FY 2024
Develop a "boot camp" for program offices to improve skills on handling clearances and standardizing proficiencies across the offices	OESPIM	FY 2024

Key Milestones	Implementing Organization(s)	Target Completion
Improve visibility into Document Approval System Hub data and use it to inform decision making and support process improvements	OESPIM, HCDMM	FY 2024
Evaluate the success of policy coordination efforts and scale leading practices across the full set of OPM’s policy making offices	OD	FY 2024
Embed regulatory training into the onboarding and upskilling opportunities for key staff that work with regulations– including those working directly with regulations and those who need increased understanding of high-level regulatory concepts	OESPIM	FY 2024
Evaluate success of pilot training on the regulatory competencies that exist within OPM organizations and determine whether additional strategies or trainings are needed	OESPIM	FY 2024
Scale regulatory training to key OPM audiences across the agency and address staffing needs	OESPIM	FY 2024
Expand participation in agency policy coordination efforts to promote cross organizational awareness	OD, WPI	FY 2024
Hold monthly CHCO Council Personnel Policy Office Hours to gather input from CHCOs and other HR experts on future human capital policies	CHCOC	FY 2024
Design and conduct evaluations for 1-2 priority workforce policies, and pilot the process of using research to develop new workforce policies for one new policy	OCFO, MSAC	FY 2024
Pilot the expanded use of a web-based collaborative platform for clearance and develop plan for 508 formatting	OESPIM, OC	FY 2024
Finalize and disseminate clearance process standard operating procedures, including recommendations from the clearance process improvement project	OESPIM	FY 2024
Implement senior leadership reviews of overdue packages using a new Document Approval System Hub dashboard	OESPIM, OD	FY 2024

Key Milestones	Implementing Organization(s)	Target Completion
Release an updated OPM style and writing guide, including templates and guidance, using 508 compliance principles	OESPIM	FY 2024
Develop checklist to help program offices identify opportunities to reach impacted stakeholders with their policy guidance*	OC	FY 2024
Evaluate whether clearance process improvements have been achieved and whether there is greater consistency in how the system is used across OPM	OESPIM, OCFO	FY 2025
Review and assess OPM's regulatory process to see if changes to regulatory staff training and processes have improved clearance times and customer satisfaction	OESPIM	FY 2025
Design and conduct evaluations on two workforce policies to increase OPM's awareness and understanding of OPM policies and programs among key stakeholders and customers	OCFO	FY 2025
Increase transparency around OPM's policymaking processes by sharing information with agencies, including estimated timelines or issuance dates, process maps of the policymaking cycle, or points of contact for specific types of policies	OESPIM	FY 2025
Increase proactive policymaking by analyzing emerging trends and key issues during CHCO sessions/meetings to determine future operating environments and workforce needs	WPI	FY 2025

**Performance Measures**

\_ \* No historical results

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Percent of priority policy guidance issued by the deadline	_ *	_ *	_ *	38.46%	0.00%	48.46%	50.00%
Percent of CHCOs who agree that OPM's policy approach is responsive to agency needs	_ *	_ *	_ *	54.55%	67.74%	69.00%	70.00%

Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points</b>				
<b>4.5 - Revamp OPM’s policy-making approach to be proactive, timely, systematic, and inclusive. By FY 2026, increase the percent of CHCOs who agree that OPM’s policy approach is responsive to agency needs by 8 percentage points.</b>			\$851,243	4.0
	<b>Workforce Policy and Innovation</b>	<b>Salaries &amp; Expenses</b>	\$313,491	1.3
	<b>Office of the Executive Secretariat, Privacy, and Information Management</b>	<b>Salaries &amp; Expenses</b>	\$385,378	1.8
	<b>Office of the Chief Financial Officer</b>	<b>Common Services</b>	\$152,374	1.0
<b>OPM Total</b>			<b>\$851,243</b>	<b>4.0</b>

Objective 4.6: Streamline Federal human capital regulations and guidance to reduce administrative burden and promote innovation while upholding merit system principles. By FY 2026, improve CHCO agreement that human capital policy changes resulted in less administrative burden to agencies by 8 percentage points.

**Strategic Objective Owner:** Ella Holman, Deputy Director, Chief Human Capital Officers Council, OD

**Deputy Strategic Objective Owners:** April Davis, Manager, ES; Laura Knowles, Manager, HRS, Charles Peterman, Manager, MSAC

**Strategies:**

- Review Federal human capital regulations and guidance usage by agencies to identify high level strategic changes to streamline and simplify human capital management
- Determine what current regulations or guidance needs to be modified to be effective in reducing the burden on agencies, while upholding merit system principles

**FY 2024 and FY 2025 Next Steps:**

Key Milestones	Implementing Organization(s)	Target Completion
Streamline and implement improvements to reduce burden and support innovation in response to agency and stakeholder feedback	WPI, MSAC, HRS, HCDMM	FY 2024
Develop a framework for reducing administrative burden in coordination with the Objective 4.2 team	WPI, MSAC, HRS, CLIA	FY 2024
Conduct a data call audit to identify outdated or duplicative requests	WPI, HCDMM, CLIA	FY 2024
Solicit feedback from the CHCOs regarding pain points and areas of burden	WPI, CHCOC	FY 2024
Create a portal for agency data submissions	WPI	FY 2025
Develop clear standards for agency data calls and enhance data analysis options to streamline reporting processes	WPI, MSAC, HRS, CHCOC	FY 2025

## Performance Measures

\_ \* No historical results

Performance Measures	FY 2019 Result	FY 2020 Result	FY 2021 Result	FY 2022 Result	FY 2023 Result	FY 2024 Target	FY 2025 Target
Percent of CHCOs who agree that the human capital management system changes resulted in less administrative burden to agencies	_ *	_ *	_ *	_ *	24.14%	29.00%	30.50%

Note: CHCOs are defined as the CHCOs and deputy CHCOs of the CHCO Act of 2002 agencies.

## Performance Budget Request by Objective, Organization and Fund – All Resources

Strategic Objectives	Organization	Fund	Dollars	FTE
<b>Provide innovative and data-driven solutions to enable agencies to meet their missions, increasing the percentage of users throughout Government who agree that OPM offered innovative solutions while providing services or guidance by 4 points</b>				
<b>4.6 - Streamline Federal human capital regulations and guidance to reduce administrative burden and promote innovation while upholding merit system principles. By FY 2026, improve CHCO agreement that human capital policy changes resulted in less administrative burden to agencies by 8 percentage points.</b>			\$1,567,665	8.5
	<b>Workforce Policy and Innovation</b>	<b>Salaries &amp; Expenses</b>	\$483,187	2.0
	<b>Merit System Accountability &amp; Compliance</b>	<b>Salaries &amp; Expenses</b>	\$825,415	4.9
	<b>Merit System Accountability &amp; Compliance</b>	<b>Trust Fund Annual</b>	\$28,026	0.2
	<b>Merit System Accountability &amp; Compliance</b>	<b>Advances &amp; Reimbursements No Year</b>	\$59,973	0.4
	<b>Office of the Director</b>	<b>Advances &amp; Reimbursements Annual</b>	\$171,064	1.0
<b>OPM Total</b>			<b>\$1,567,665</b>	<b>8.5</b>



## Earned Benefits Trust Funds

OPM administers the following Earned Benefits Trust Funds:

- FEHB – Federal Employees Health Benefits Fund;
- FEGLI – Federal Employees’ Life Insurance Fund;
- CSRDF – Civil Service Retirement and Disability Fund; and
- PSRHB – Postal Service Retiree Health Benefits Fund.

OPM also manages the risk reserve account for the Federal flexible spending account program (FSAFEDS). These trust funds are among the largest held by the United States Government. For FY 2025, the net assets combined total is \$1.2 trillion, receipts total \$217 billion, and outlays total \$196 billion. These trust funds will finance: the retirement program for 2.4 million Federal civilian employees and provide retirement benefits for retirees and survivors, 2.8 million; finance the health insurance for an estimated 8.2 million employees, retirees, and eligible family members; and provide life insurance coverage for 4.4 million employees and retirees.

### FY 2025 All Earned Benefits Funds (millions)

Budget Items	CSRDF	FEHB/REHB	FEGLI	PSRHF	FSAFEDS	Total
FY 2025 Start of Year Fund Balance	\$1,061,289	\$20,295	\$52,633	\$28,055	\$107	\$1,162,379
FY 2025 Receipts	\$137,919	\$72,131	\$6,253	\$630	\$22	\$216,955
FY 2025 Outlays	\$114,697	\$71,944	\$4,565	\$4,955	\$17	\$196,178
<b>FY 2025 End of Year Fund Balance</b>	<b>\$1,084,511</b>	<b>\$20,482</b>	<b>\$54,321</b>	<b>\$23,730</b>	<b>\$112</b>	<b>\$1,183,156</b>
FY 2025 Participants:						
Actives (Millions)	2,444	2,210	2,649			
Annuitants (Millions)	2,826	1,963	1,733			

## Trust Fund Financing

A key component of OPM’s mission is to: administer retirement; health benefits; long-term care insurance; life insurance; dental and vision benefits; and flexible spending accounts for Federal employees, retirees, and their beneficiaries; and to maintain the integrity of these programs. The table below highlights the receipts and outlays for the Federal health benefit fund.



## Employee Health Benefits Fund & Retired Employees Health Benefits Fund (millions)

Budget Items	FY 2023 Actual	FY 2024	FY 2025	FY 2024 – 2025 Variance
		Estimate	Estimate	
Start of Year Balance	\$22,836	\$21,656	\$20,295	(\$1,361)
Receipts from the Public	\$19,480	\$21,270	\$22,604	\$1,334
Receipts from Federal Sources	\$42,951	\$45,904	\$48,493	\$2,589
Interest Earnings	\$940	\$1,053	\$1,034	(\$19)
Change in Uncollected Customer Payments	\$0	\$0	\$0	\$0
Total Program Outlays	\$65,026	\$69,588	\$71,944	\$2,356
<b>End of Year Balance</b>	<b>\$21,656</b>	<b>\$20,295</b>	<b>\$20,482</b>	<b>\$187</b>

### Employees Health Benefits Fund

The Employees Health Benefits (FEHB) Fund is a revolving Trust Fund created by the Federal Employees Health Benefits Act of 1959. It finances the largest employer-sponsored group health insurance program in the world. The fund exists to collect and disburse health insurance premiums to private insurers who participate in the FEHB Program and to maintain program reserves. Federal employees can choose from among Fee-for-Service (FFS) plans, Health Maintenance Organizations (HMO) plans, Consumer Driven Health plans, and High Deductible plans. The number and type of plans available vary by region or locality.

The FEHB fund provides for the cost of health benefits for:

- active employees;
- employees who retired after June 1960, or their survivors;
- annuitants transferred from the Retired Employees Health Benefits (REHB) program as authorized by Public Law (P.L.) 93-246;
- employees of Indian tribes or tribal organizations carrying out programs under the Indian Self-Determination and Education Assistance Act or the Tribally Controlled Schools Act of 1988 and urban Indian organizations carrying out programs under Title V of the Indian Health Care Improvement Act; and
- eligible family members.

It also provides for OPM expenses to administer the program.

## Retired Employees Health Benefits Fund

The Retired Employees Health Benefits (REHB) Fund, created by the Retired Federal Employees Health Benefits Act of 1960, provides for the costs of:

- retired employees and survivors who were enrolled in a Government-sponsored uniform health benefits plan;
- Government contributions to retired employees and survivors who retain or purchase private health insurance; and
- OPM expenses to administer the program.

The REHB program is closed to new enrollees and its enrolled population is dwindling. The projected population is 48 for FY 2023 and 40 for FY 2024.

The FEHB and REHB funds are financed by:

- premium withholdings from active employees and annuitants;
- agency contributions to premiums for active employees;
- Government contributions to premiums for annuitants;
- premium collections from tribal organizations and their employees; and
- contributions made by the United States Postal Service in accordance with the provisions of Public Law 101-508.

OPM maintains a contingency reserve that is funded by employee and Government contributions that may be used to defray future cost increases or provide increased benefits. OPM makes payments to carriers from this reserve whenever carrier-held reserves fall below levels prescribed by OPM regulations or when carriers can demonstrate good cause, such as unexpected claims experience or variations from expected community rates. In determining a biweekly subscription rate to cover program costs, 1.0 percent is added for administrative expenses and 3.0 percent is added for a contingency reserve held by OPM for each carrier. OPM is authorized to transfer unused administrative reserve funds to the contingency reserve.

### Employees Life Insurance Fund (millions)

Budget Items	FY 2023 Actual	FY 2024 Estimate	FY 2025 Estimate	FY 2024- 2025 Variance
Start of Year Balance	\$49,262	\$50,766	\$52,633	\$1,867
Receipts from the Public	\$3,341	\$3,613	\$3,613	\$0
Receipts from Federal Sources	\$733	\$700	\$700	\$0
Interest Earnings	\$1,236	\$1,940	\$1,940	\$0
Change in Uncollected Customer Payments	\$0	\$0	\$0	\$0
Total Program Outlays	\$3,806	\$4,386	\$4,565	\$179
<b>End of Year Balance</b>	<b>\$50,766</b>	<b>\$52,633</b>	<b>\$54,321</b>	<b>\$1,688</b>

The FEGLI fund finances payments for Employees' Life Insurance. FEGLI was established by the passage of the Federal Employees' Group Life Insurance Act of 1954 (P.L. 83-598), on August 17, 1954. FEGLI is group term life insurance, meaning it does not build cash values or paid-up insurance values. The cost of Basic Insurance coverage is shared by non-Postal employees (2/3), and the Federal Government (1/3). Optional and certain post-retirement basic coverage are paid entirely by enrollees.

The FEGLI program is an employer-sponsored life insurance Trust Fund program. This program provides benefit payments to beneficiaries following the death of employees, retired employees, and eligible family members. Employees also have an additional accidental death and dismemberment benefit. It is the largest group life insurance program in the world, covering more than four million Federal employees and retirees, and many of their family members. The above table highlights the estimated receipts and outlays for the Federal life insurance fund.

### Civil Service Retirement and Disability Fund (millions)

Budget Items	FY 2023 Actual	FY 2024 Estimate	FY 2025 Estimate	FY 2024 – 2025 Variance
Start of Year Balance	\$1,011,679	\$1,037,226	\$1,061,289	\$24,063
Receipts from the Public	\$6,835	\$7,547	\$8,109	\$562
Receipts from Federal Sources	\$98,897	\$101,144	\$103,322	\$2,178
Interest Earnings	\$23,886	\$25,707	\$26,488	\$781
Total Program Outlays	\$104,071	\$110,335	\$114,697	\$4,362
End of Year Balance	\$1,037,226	\$1,061,289	\$1,084,511	\$23,222

The Civil Service Retirement and Disability Fund (CSRDF) is the oldest and largest of the four trust funds administered by OPM. The fund is financed and structured very differently from the other three trust funds. It is characterized by permanent indefinite budget authority. Budget

authority is the authority to incur obligations and pay expenses which become available to an agency during any fiscal year. Once approved, permanent budget authority is permanently available for all future years. Indefinite budget authority is used when the precise amount of budget authority required cannot be forecasted in advance and must be determined at some future point in time (for example, when actual receipts and expenses become known). The above table highlights the receipts and outlays for the Federal retirement and disability fund.

The CSRDF finances two Federal civilian retirement systems: the Civil Service Retirement System (CSRS) established on May 22, 1920, and the Federal Employees Retirement System (FERS) established on June 6, 1986. CSRS is largely a defined benefit plan, covering Federal employees hired prior to 1984. Some CSRS employees (CSRS-Offset) participate in the Social Security system. FERS is one element of a three-tiered pension program that uses Social Security as a base, provides an additional basic benefit, and includes a Thrift Savings Plan. FERS covers employees hired after 1983 and formerly CSRS-covered employees who elected to join FERS. For FY 2024, it is estimated that employees will contribute \$7.3 billion to finance FERS and CSRS retirement benefits. Those contributions will come in the form of salary withholdings of 0.8 percent for most employees under FERS-Regular, 3.1 and 4.4 percent for FERS Revised Annuity Employees (FERS-RAE) and FERS Further Revised Annuity Employees (FERS-FRAE) employees, and 7.0 percent for those enrolled in CSRS.

CSRS has been financed under a statutory funding method passed by the Congress in 1969. This funding method is based on the “static” economic assumptions of no future inflation, no future general schedule salary increases, and a 5.0 percent interest rate. Under CSRS, regular employees contribute 7.0 percent of pay. Law enforcement officers, firefighters, and congressional employees contribute an extra 0.5 percent of pay, and members of the Congress an extra 1.0 percent of pay. Under the static funding method for CSRS, the Treasury also pays interest on any static unfunded liabilities that are not being financed by the Postal Service. The Treasury also makes payments to amortize, over a 30-year period, any increases in the static unfunded liability due to salary increases for non-Postal employees that occurred during the year, and pays for the cost of any benefits attributable to military service for both Postal and Non-Postal employees that were paid out during the year.

FERS is funded under a dynamic entry age normal funding method as prescribed in Chapter 84 of Title 5, United States Code. Employees and agencies together contribute the full amount of the dynamic normal cost rate. The normal cost rate is for the defined benefit plan only and does not include the cost of Social Security or the Thrift Savings Plan. FERS regular employees contribute a percentage of salary of 0.8 percent that, combined with the 6.2 percent tax rate

under the Old Age, Survivors and Disability Insurance portion of Social Security, is equal to the contribution rate for CSRS employees of 7.0 percent. Greater employee contribution rates apply for FERS-RAE, and FERS-FRAE.

Effective FY 2023, the normal cost rates are as follows: Regular FERS Non-Postal employees (other than RAE and FRAE), the normal cost rate will be 19.2 percent of pay (employee’s share, 0.8 percent, and employer’s share, 18.4 percent); Regular FERS Postal employees will be 17.0 percent of pay (employee’s share, 0.8 percent, and employer’s share, 16.2 percent); FERS-RAE Non-Postal employees, the normal cost rate will be 19.7 percent of pay (employee’s share, 3.1 percent, and employer’s share, 16.6 percent); FERS-RAE Postal employees will be 17.5 percent of pay (employee’s share, 3.1 percent, and employer’s share, 14.4 percent); FERS-FRAE Non-Postal employees, the normal cost rate will be 19.9 percent of pay (employee’s share, 4.4 percent, employer’s share, 16.6 percent, and less excess of 1.1 percent to be credited back to the assets of the CSRDF); FERS-FRAE Postal employees will be 17.8 percent of pay (employee’s share, 4.4 percent, and employer’s share, 13.4 percent).

Effective FY 2024, the normal cost rates are as follows: Regular FERS Non-Postal employees (other than RAE and FRAE), the normal cost rate will be 19.2 percent of pay (employee’s share, 0.8 percent, and employer’s share, 18.4 percent); Regular FERS Postal employees will be 16.9 percent of pay (employee’s share, 0.8 percent, and employer’s share, 16.1 percent); FERS-RAE Non-Postal employees, the normal cost rate will be 19.6 percent of pay (employee’s share, 3.1 percent, and employer’s share, 16.5 percent); FERS-RAE Postal employees will be 17.3 percent of pay (employee’s share, 3.1 percent, and employer’s share, 14.2 percent); FERS-FRAE Non-Postal employees, the normal cost rate will be 19.9 percent of pay (employee’s share, 4.4 percent, employer’s share, 16.5 percent, and less excess of 1.0 percent to be credited back to the assets of the CSRDF); FERS-FRAE Postal employees will be 17.6 percent of pay (employee’s share, 4.4 percent, and employer’s share, 13.2 percent).

**Postal Service Retiree Health Benefits Fund (millions)**

Budget Items	FY 2023 Actual	FY 2024 Estimate	FY 2025 Estimate	FY 2024 – 2025 Variance
Start of Year Balance	\$35,607	\$32,046	\$28,055	(\$3,991)
Receipts from the Public (Postal Service)	\$0	\$0	\$0	\$0
Receipts from Federal Sources	\$0	\$0	\$0	\$0
Interest Earnings	\$791	\$614	\$630	\$16
Total Program Outlays	\$4,352	\$4,605	\$4,955	\$350
<b>End of Year Balance</b>	<b>\$32,046</b>	<b>\$28,055</b>	<b>\$23,730</b>	<b>(\$4,325)</b>

This account receives from the Postal Service: 1) the pension savings provided to the Postal Service by the Postal Civil Service Retirement System Funding Reform Act of 2003 (P.L.108–18) that were held in escrow during 2006; 2) payments defined within P.L.109–435, and modified by P.L. 111–68, to begin the liquidation of the Postal Service's unfunded liability for post-retirement health benefits; 3) beginning April 1, 2024, payments (defined within P.L. 117-108) of late enrollment Medicare Part B for those Medicare-eligible USPS employees and annuitants who have not enrolled in Medicare Part B; and 4) beginning in 2026, pursuant to provisions of the Postal Service Reform Act of 2022 (P.L. 117-108) codified at 5 U.S.C. 8909a(d), the amount (if any) where Government contributions from the Fund exceeded the estimated net claims costs, under the enrollment of Postal Service annuitants or survivors, for the most recently concluded fiscal year. This account also receives any surplus resources of the Civil Service Retirement and Disability Fund that are not needed to finance future retirement benefits under the Civil Service Retirement System to current or former employees of the Postal Service that are attributable to civilian employment with the Postal Service. The above table highlights the receipts and outlays for the Postal retiree health benefit fund.

Effective FY 2017, as provided under the current law, the Postal Service stopped paying annual premium costs for its current annuitants and these premium payments are paid directly from the Postal Service Retiree Health Benefits Fund. Payments for a proportion of the premium costs of Postal Service annuitants' pre-1971 service continues to be paid by the General Fund of the Treasury through the Government Payment for Annuitants, Employees Health Benefits account.

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**Federal Flexible Spending Account Program (millions)**

Budget Items	FY 2023 Actual	FY 2024 Estimate	FY 2025 Estimate	FY 2024 – 2025 Variance
Start of Year Balance	\$64	\$111	\$107	(\$4)
Receipts from the Public	\$46	\$22	\$21	(\$1)
Receipts from Federal Sources	\$1	\$1	\$1	\$0
Program Obligations (Mandatory)	\$0	\$11	\$17	\$6
Agency Administrator Cost and Program	\$0	\$16	\$0	(\$16)
<b>End of Year Balance</b>	<b>\$111</b>	<b>\$107</b>	<b>\$112</b>	<b>\$5</b>

The Federal Flexible Spending Account Program (FSAFEDS) is a voluntary tax-advantaged benefit plan established under Section 125 of the Internal Revenue Code. These accounts allow Federal employees to pay for eligible out-of-pocket health care and dependent care expenses

with pre-tax dollars. The average person will save about 30.0 percent on dependent care and health care expenses after taxes.

There are three types of accounts under the FSAFEDS:

- Health Care Flexible Spending Accounts (HCFSA);
- Limited Expense Health Care Flexible Spending Account (LEX HCFSA); and
- Dependent Care Flexible Spending Account (DCFSA).

The funds cannot be transferred between accounts. In 2023, DCFSAAs had a minimum annual election of \$100 and \$10,500 maximum (\$5,250 for married couples, filing separately). HCFSAAs and LEX HCFSAAs had a minimum annual election of \$100 and \$2,750 maximum. There are currently 488,171 unique participants (548,609 total accounts) in the FSAFEDS program with a little over 457,437 HCFSAAs, 11,788 LEX HCFSAAs, and 79,384 in DCFSAAs.

The Risk Reserve account contains the accumulated balance of fees which are collected from reserve fees and forfeited funds. The reserve fees are from employing agencies whose employees participate in the FSAFEDS and from forfeitures of FSAFEDS participants who have unclaimed balances. The agency fees are calculated based on the number of employees from each agency participating in the program. Resources are obligated to indemnify the FSAFEDS program administrator when claims against FSA accounts exceed resources contributed to the accounts from participating employees (early in the program year). Once account contributions exceed benefits, the FSAFEDS program administrator reimburses the reserve account. Account resources are also used for the agency's administration of the program. The above table highlights the receipts and obligations for the FSAFEDS.

OPM's actuaries have determined that the current value of the risk reserve account is more than sufficient to indemnify the program administrator. Since FY 2013, OPM has used risk reserves to offset agency fees paid to the program administrator to reduce the surplus balance and meet its target account level.

## Payment Accounts

OPM receives "such sums as necessary" mandatory appropriations for payments from the General Fund to the Civil Service Retirement and Disability Fund, the Employees Health Benefits Fund, and the Employees Group Life Insurance Fund. The purposes and amount of these payments are described in this section.

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**Government Payment for Annuitants, Employees Health Benefits (millions)**

Budget Items	FY 2023 Actual	FY 2024 Estimate	FY 2025 Estimate	FY 2024 – 2025 Variance
Budget Authority	\$14,495	\$15,236	\$16,172	\$936
Obligations	\$14,495	\$15,236	\$16,172	\$936
Outlays	\$14,448	\$14,586	\$16,020	\$1,434

This appropriation funds the Government’s share of health benefit costs for annuitants and survivors. OPM requests the appropriation necessary to pay this contribution to the Employees Health Benefits Fund and the Retired Employees Health Benefits Fund. This appropriation covers:

- the Government’s share of the cost of health insurance for annuitants as defined in sections 8901 and 8906 of Title 5, United States Code;
- the Government’s share of the cost of health insurance for annuitants (who were retired when the Federal employee’s health benefits law became effective), as defined in the Retired Federal Employees Health Benefits Act of 1960; and
- the Government’s contribution for payment of administrative expenses incurred by OPM in administration of the Retired Federal Employees Health Benefits Act.

For FY 2025, budget authority and obligations will increase by \$936 million due to projected growth in the cost of health insurance and in the number of annuitants with FEHB coverage.

Funds appropriated to this account remain available until expended for the purpose of funding the Government’s share of health benefits costs for annuitants and survivors who no longer have an agency to contribute the employer’s share. OPM has the authority to notify the Secretary of the Treasury of “such sums as may be necessary” to carry out these provisions.

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**Government Payment for Annuitants, Employees Life Insurance (millions)**

Budget Items	FY 2023 Actual	FY 2024 Estimate	FY 2025 Estimate	FY 2024- 2025 Variance
Budget Authority	\$43	\$43	\$44	\$1
Obligations	\$43	\$43	\$44	\$1
Outlays	\$43	\$43	\$44	\$1

P.L. 96-427, Federal Employees’ Group Life Insurance Act of 1980, enacted October 10, 1980, requires that all employees under age 65 who retired on or after January 1, 1990, continue to make contributions toward their basic life insurance coverage (currently \$0.33 per month for each \$1,000 of coverage). As with active Federal employees, the Government is required to contribute one-third of the cost of the premium (currently \$0.17 per month for each \$1,000 of



coverage) for basic coverage for annuitants. OPM, acting as the payroll office on behalf of Federal retirees, is requesting the funds necessary to make the required Government contribution for annuitants’ post-retirement basic life coverage.

For FY 2025, budget authority and obligations will increase \$1.0 million due to the number of annuitants under age 65 with FEGLI coverage.

Funds appropriated to this account remain available until expended for the sole purpose of financing post- retirement life insurance benefits. OPM notifies the Secretary of the Treasury of “such sums as may be necessary” to carry out these provisions each fiscal year.

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**Payment to the Civil Service Retirement and Disability Fund (millions)**

Budget Items	FY 2023 Actual	FY 2024 Estimate	FY 2025 Estimate	FY 2024 – 2025 Variance
Budget Authority	\$49,889	\$50,530	\$50,830	\$300
Obligations	\$49,889	\$50,530	\$50,830	\$300
Outlays	\$49,889	\$50,530	\$50,830	\$300

The Payment to the Civil Service Retirement and Disability Fund (CSRDF) consists of an appropriation and a permanent indefinite authorization to pay the Government’s share of retirement costs as defined in the Civil Service Retirement Amendments of 1969 (P.L. 91-93), the Federal Employees Retirement Act of 1986 (P.L. 99-335), and the Civil Service Retirement Spouse Equity Act of 1985 (P.L. 98-615). The payment is made directly from the General Fund of the U.S. Treasury into the Civil Service Retirement and Disability Fund and is in addition to appropriated funds that will be contributed from agency budgets.

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**Detail of Payment Account (millions)**

Budget Items	FY 2023 Actual	FY 2024 Estimate	FY 2025 Estimate	FY 2024 – 2025 Variance
Current Appropriation	\$20,959	\$20,600	\$21,600	\$1,000
Permanent Indefinite Authorization	\$28,900	\$29,900	\$29,200	(\$700)
Payment for Spouse Equity	\$30	\$30	\$30	\$0
<b>Total</b>	<b>\$49,889</b>	<b>\$50,530</b>	<b>\$50,830</b>	<b>\$300</b>

**Current Appropriation: Payment of Government Share of Retirement Costs**

P.L. 91-93 provides for an annual appropriation to amortize, over a 30-year period, all increases in Civil Service Retirement System costs resulting from acts of Congress granting new or liberalized benefits, extensions of coverage, or pay raises, exclusive of the effects of cost-of-living adjustments (COLAs). OPM notifies the Secretary of the Treasury each year of “such sums as may be necessary” to carry out these provisions.

## Permanent Indefinite Authorization: Transfers for Interest on Static Unfunded Liability and Payment of Military Service Annuities

P.L. 91-93 also provides permanent indefinite authorization for the Secretary of the Treasury to transfer, on an annual basis, an amount equal to 5.0 percent interest on the Civil Service Retirement System's current static unfunded liability, which is calculated based on static economic assumptions and annuity disbursements attributable to credit for military service. These values reflect the additional liability for military service credit of former United States Postal Service employees. This provision was enacted by the Postal Accountability and Enhancement Act (P.L.109-435).

For FY 2025, the Permanent Indefinite Authorization will increase \$300 million due to an increase in the amount of interest to be transferred from the Treasury.

## Payment for Spouse Equity

P.L. 98-615 provides the Secretary of the Treasury to transfer an amount equal to the annuities granted to eligible former spouses of annuitants who died between September 1978 and May 1985 who did not elect survivor coverage.



## Revolving Fund Activities

Pursuant to Title 5, U.S.C. §1304 (e) (1), OPM is authorized to use Revolving Funds without fiscal year limitations to conduct background investigations, training, and other personnel management services that OPM is authorized or required to perform on a reimbursable basis. Under this guidance, OPM operates several programs, which are funded by fees or reimbursement payments collected from other agencies and other payments.

The following programs are authorized to use Revolving Funds:

- Suitability Executive Agent
- Human Resources Solutions
- Enterprise Human Resources Integration
- Human Resources Line of Business
- Human Resources Solutions Information Technology Program Management Office; and
- Credit Monitoring and Identity Protection Services
- Federal Executive Boards

The following table discusses the business lines followed by a detailed description of the activities supported by OPM’s Revolving Fund, which is aligned with OPM’s statutory authority.

OPM Budget Authority	FY 2025 CBJ
Suitability Executive Agent	\$11,732,689
Human Resources Solutions	\$433,654,876
Enterprise Human Resources Integration	\$40,066,689
HR Line of Business	\$3,150,000
Human Resources Solutions Information Technology Program Management Office	\$115,475,705
Credit Monitoring	\$98,398,169
Federal Executive Boards	\$13,500,000
<b>OPM Total</b>	<b>\$715,978,127</b>

### Suitability Executive Agent

Pursuant to Executive Order 13467, as amended, the OPM Director is the Suitability & Credentialing Executive Agent, with specific Government-wide responsibilities. Suitability Executive Agent Programs (SuitEA) was established as a distinct program office within OPM in

December 2016 to strengthen the effectiveness of suitability and credentialing vetting across the Government by providing a focal point within OPM for leadership, process improvement, and modernization while continuing to perform adjudicative operations benefitting Federal agencies.

SuitEA carries out its responsibilities through a policy office responsible for business transformation and modernization of the Government-wide suitability, fitness, and credentialing program, supported by an adjudicative operations staff that takes Government-wide actions to promote the efficiency and protect the integrity of Federal agencies' operations, and an oversight team that conducts assessments of Federal agencies' performance and makes recommendations for improvement. Additionally, SuitEA may provide adjudication support services for agencies on a reimbursable basis, which includes making suitability determinations when an agency elects to not perform the functions that have been delegated to them by OPM.

SuitEA is part of the OPM revolving fund, and as such acts as a fee-for-service program with 100 percent of its resourcing coming from its federal customers. Starting in FY 2021, SuitEA began collecting resources through its own inter-agency agreements based on a new customer-vetted cost model. SuitEA prides itself on its customer service and will continue to keep costs down while providing the highest level of service possible. SuitEA's Federal customers are given their estimated allocation costs two years in advance in order to match the budget cycles. For the FY 2025 budget submission, because SuitEA collects resources through a revolving fund it strives to make the amount collected from customers equal to expenses; however, if SuitEA has a slight surplus or deficit from year to year, SuitEA is committed to operating on a break-even basis to the best of its ability, typically over a five-year period.

Resources collected for this program include those used for SuitEA's adjudicative operations staff who review investigations submitted by federal agencies. They identify those cases potentially warranting an action by OPM and gather evidence needed to take an action and defend it in the event of an appeal to the Merit Systems Protection Board. When an applicant or appointee seeking employment with a Federal agency has committed falsification or fraud in the hiring process or has committed pre-employment conduct that is incompatible with the integrity or efficiency of the service, SuitEA may take a Government-wide action to debar the individual from holding any covered position throughout Government for up to three years. Covered positions are those in the competitive service, the excepted service that can non-competitively convert to the competitive service, or a career appointment to the Senior

Executive Service. This action promotes the efficiency and integrity of the agency with whom the individual sought employment as well as all other agencies employing competitive service employees as it prevents or removes an unsuitable individual from placement in a position. SuitEA conducts supplemental inquiries needed for issue resolution and must gather evidence that meets the requirements established through precedential case law. If the case does not warrant OPM adjudication after issue resolution, SuitEA will send the additional information obtained to the agency for adjudication if appropriate. There is a regulatory time limitation for taking suitability actions which makes it imperative that the cases are identified quickly upon completion.

Similarly, SuitEA reviews background investigations for positions under OPM's jurisdiction that involve major issues to include material intentional falsification or fraud or deception in examination of appointment. This may include the applicant or appointee who has committed a serious criminal offense or who has altered or submitted altered documents, misrepresented a college degree through the purchase of the degree through a bogus educational institution, and/or lied about a material fact on application paperwork. Upon receipt, SuitEA staff will review the case; conduct issue resolution; issue written notification about the issues of concern to the subject of the investigation; process subject requests for the materials relied upon; take suitability actions which may include canceling eligibilities or reinstatement rights, imposing debarment from Federal employment, and/or directing removal; and support the Office of General Counsel when OPM suitability actions are appealed.

Beginning in FY 2024 SuitEA plans to expand its adjudicative services. It will begin to offer customer agencies the ability to request that SuitEA makes all suitability and fitness determinations on the behalf of the requesting agency. In most cases these determinations will be done on a reimbursable basis once the results of a background investigation are completed. Before entering into an agreement, the agency will be vetted to establish that we can support the additional workload and that the requesting agency needs SuitEA support. The funding collected for this initiative is estimated to be very small in FY 2024 and FY 2025 but may expand in the future.

Resources collected through inter-agency agreements allow customer agencies to attend and benefit from the government-wide suitability training programs that SuitEA developed and offers for suitability and fitness adjudicators with no additional attendee fee. These classes are compliant with the National Training Standards for Suitability Adjudicators. In FY 2023, SuitEA issued updates to the National Training Standards for Suitability Adjudicators to align with

Trusted Workforce 2.0 policy updates while co-leading an effort for similar revisions to the National Training Standards for Security Adjudicators and Background Investigations. Delivery of compliant training to federal agencies' adjudicators promotes uniform decision making across Government, professional development of the suitability and fitness workforce, and reciprocal recognition of favorable determinations. SuitEA also developed and offered training to bridge the gap between the former and the new National Training Standards for Suitability Adjudicators. This training addressed policy changes brought about by Trusted Workforce 2.0 while also updating training content of its' Government-wide training offerings. SuitEA also offers refresher training sessions to stakeholders. These periodic sessions offer retraining on key aspects of delegated functions and aim to keep practitioners' knowledge up to date. Additionally, SuitEA is continuing to take steps towards developing training for credentialing adjudicators and may look to expand its training offerings to address other vetting-related areas within its purview.

SuitEA's training is offered both virtually and in person. Virtual delivery of training, first offered in FY 2021, has proven to be highly effective and has allowed SuitEA to increase the number of courses offered due to recognized cost savings by eliminating travel for instructors and reducing the need for supplies to produce hard copy versions of training materials. Without the need to send students to the courses, agencies have also seen savings in their respective travel budgets. Costs for existing trainings are built into the SuitEA budget and each year an analysis will be conducted to determine if increases or decreases in training demand will warrant a budget adjustment and/or the need to begin charging attendees on an individual basis.

SuitEA operates a suitability helpline and suitability and credentialing email boxes to provide customer support on technical and interpretative matters related to suitability, fitness, and credentialing. SuitEA also maintains a distribution list of agency contacts for regular two-way communication to support Federal agency suitability, fitness, and credentialing programs. SuitEA provides this network of contacts a quarterly newsletter covering current events and other matters of the interest to the Suitability/Fitness and Credentialing community. SuitEA acts on behalf of agencies by providing requirements for the systems used to support position designation, adjudication, and reciprocity management for federal employees and contractors.

SuitEA Oversight inspects Executive Branch personnel vetting programs to support at a minimum personnel suitability, fitness, credentialing, and investigative requirements for persons working for and on behalf of the Federal Government, as well as to enable efficient and

effective processes in support of reciprocal recognition of investigations and suitability/fitness and credentialing adjudications across Government.

SuitEA Oversight's team of 8 Inspectors currently conducts 18 full inspections and approximately 10-15 follow-up inspections each fiscal year. In FY 2023 Oversight continued to conduct the majority of their reviews remotely, due to the COVID-19 pandemic. As public health considerations allow, Oversight will continue to phase in in-person reviews during FY 2024 and FY 2025 to the extent practicable.

In coming fiscal years, Oversight will look to further streamline inspection processes and increase Oversight staff, in order to increase the number of programs inspected each year, further supporting efficient processes across government. Oversight is also looking to add broader-scope trend analysis, focusing on identifying areas of weakness and success across all Executive Branch agencies.

Directly contributing to OPM Strategic Objective 4.2, SuitEA took steps to continue improving the quality of delegated suitability adjudications government-wide by issuance of guidance that promotes greater consistency in how adjudicators apply suitability criteria when addressing conduct associated with emerging societal trends or conditions. In February 2021, SuitEA issued supplemental guidance for assessing suitability of applicants based upon prior marijuana usage and a reminder on drug free workplace policies. These efforts to align guidance to societal trends and conditions will continue into FY 2025 as SuitEA prepares and issues updated supplemental guidance to its Suitability regulations. SuitEA will also continue to be proactive and agile in issuing government-wide guidance to assist in unprecedented situations. At the onset of the COVID-19 pandemic, SuitEA issued temporary vetting measures to enable agencies to continue to onboard new personnel by delaying fingerprints submissions, in coordination with complementary guidance from the Federal OCIO. SuitEA monitored the impact of COVID-19 safety measures on personnel vetting requirements and issued guidance to assist agencies, as necessary. In Q3 FY 2023, SuitEA rescinded the temporary vetting measures and required agencies to submit outstanding fingerprints within three months. SuitEA worked closely with agencies with high volumes of prints to provide any assistance they might need to meet the deadline. SuitEA will explore whether some of the flexibilities offered during COVID-19 maximum telework posture may be permanently implemented to facilitate the onboarding process, particularly when processing workers who live in remote areas where it is not practical for them to travel to the agency for in-person on-boarding and/or identity proofing. Should



permanent changes be feasible, SuitEA will seek to implement any needed policy guidance in FY 2024 and 2025 to assist agencies in future years.

In accordance with the roadmap for a transformed Government-wide approach to suitability, fitness, credentialing, and security vetting developed with the Office of the Director of National Intelligence (ODNI) and the Performance Accountability Council (PAC) as part of the Trusted Workforce 2.0 initiative, SuitEA has continued to co-lead efforts to develop transformational outcome-based policy. The “Federal Personnel Vetting Core Doctrine,” developed and issued in the Federal Register by SuitEA and ODNI, became effective in February 2021. It lays out the foundational level of policy framework describing the philosophy for a transformational Federal personnel vetting program for the Executive Branch by defining the personnel vetting mission, its guiding principles, key supporting processes, and policy priorities. In FY 2022, SuitEA and ODNI issued guidelines for Federal Personnel Vetting, Performance Management, and Engagement. These guidelines describe the vision for modernizing the personnel vetting enterprise by establishing strategic outcomes for transformational changes to personnel vetting policies and processes, performance management, and engagement with individuals undergoing the vetting process. The guidelines are aligned with and supportive of the Federal Government’s broader efforts to recruit and retain a diverse and talented workforce. Additionally, SuitEA and ODNI jointly issued the Federal Personnel Vetting Investigative Standards, marking a key milestone in the transformation of the investigative process. These Standards use a risk management approach to investigations that maximizes uniformity across all Federal personnel vetting domains and focuses on the efficient collection of information needed to make informed trust determinations. Additionally, SuitEA and ODNI jointly issued the Common Principles in Applying Federal Personnel Vetting Adjudicative Standards and the Federal Personnel Vetting Performance Management Standards. The Common Principles in Applying Federal Personnel Vetting Adjudicative Standards provide guidance to further align processing and adjudications for suitability, security, and credentialing, to the maximum extent possible. The Federal Personnel Vetting Performance Management Standards assess the success of personnel vetting programs by measuring efficiency, effectiveness, fairness, and risk across the Federal personnel vetting enterprise, enabling departments and agencies to make effective and data-driven decisions.

In FY 2024, SuitEA together with ODNI issued guidance to implement Trusted Workforce policies and measures including the vetting scenarios (initial vetting, continuous vetting, upgrades, transfer of trust, and reestablishment of trust) and the Performance Management

Standards Implementation Guidance (PMIG). The PMIG establishes the aspirational targets for previously issued metrics designed to measure the success of the TW 2.0 reform efforts. Further policy development and phased implementation of the roadmap will take place in FY 2024 and FY 2025 as SuitEA, together with the PAC and ODNI, works with agencies through to transition them to modernized personnel vetting capabilities. In FY 2025 SuitEA will closely monitor the reform efforts implementation, work closely with agencies, monitor the performance metrics to support data driven continuous improvement of the TW 2.0 personnel vetting framework.

In FY 2023 SuitEA proposed amendments to its regulations to bring about greater consistency in determinations of fitness for positions outside of the competitive service. With the final rule, this will further increase agency confidence in making reciprocal determinations and improve mobility for Federal employees or applicants wishing to re-enter service for or on behalf of the Federal Government. Concurrently, in FY 2023 SuitEA also proposed regulations for continuous vetting for low-risk and public trust positions to allow movement away from traditional periodic reinvestigations and assist agencies in better mitigating risk. Through FY 2025, SuitEA will work to implement government-wide guidance and training for regulatory changes arising from changes to vetting policy that will occur through rulemaking.

Additionally, in FY 2023 and FY 2024, SuitEA identified and proposed changes to information collections to support Trusted Workforce policy and process changes as well as to elicit potential domestic terrorism involvement, consistent with the National Strategy for Countering Domestic Terrorism. SuitEA will seek implementation of such changes in the business systems supporting federal vetting by end of FY 2024.

In FY 2021, SuitEA issued and implemented updated credentialing standards procedures for issuing personal identity verification (PIV) credentials under Homeland Security Presidential Directive-12 and new requirements for suspension or revocation of eligibility for PIV credentials. The procedures in this guidance standardized appeals procedures for PIV denials, clarified the applicability of PIV determinations to short-term population, and introduced the concept of suspension / revocation of PIV eligibility. The existing OPM credentialing guidance documents are being consolidated and will be proposed in regulation through the Notice of Proposed Rule Making. SuitEA anticipates publication of the rule change in FY 2024 (slated as 5 CFR, part 737). Once final, SuitEA will create and coordinate a Credentialing Handbook and Best Practices guide with stakeholders in FY 2024. Content development for the handbook began in FY 2022 and will include information requested by credentialing stakeholders across the

Executive branch. SuitEA will also begin work on a virtual credentialing adjudication’s training once the final regulation is issued. In FY 2025, SuitEA will engage stakeholders to provide implementation guidance as needed and promote the credentialing handbook and training available. The Credentialing regulation will include personnel vetting standards for short-term population requiring access to Federal facilities and IT systems in response to an OMB request that OPM issue such guidance, per OMB M-19-17, *Enabling Mission Delivery through Improved Identity, Credential, and Access Management*. If the proposed rule is approved, Agencies will be required to implement the minimum vetting requirement of fingerprints and identity verification to issue an alternative credential granting access to Federal space and IT systems for no longer than six months. This will be the first time such vetting will be required of this population and SuitEA plans to include supplemental guidance in the Credentialing Handbook.

Since FY 2021, SuitEA has been collaborating with USAccess, the largest PIV credentialing issuer in the U.S. government to improve Departments and Agencies’ reporting to the personnel vetting central repository system hosted by the Defense Counterintelligence and Security Agency (DCSA). SuitEA continues to liaise between USAccess and DCSA to assist efficient information sharing in support of workforce “transfers of trust,” or reciprocal acceptance of existing credentials. In FY 2022, SuitEA hired a credentialing security specialist to assist with credentialing training development, stakeholder engagement, and Trusted Workforce reform efforts.

SuitEA continues to provide personnel vetting requirements for the new supporting IT Enterprise architecture for federal personnel vetting. Department of Defense’s updated background investigation system is being built, and SuitEA will continue to contribute requirements to meet the needs of security, suitability, and credentialing (SSC) programs and promote accessibility to shared service offerings. As OPM transitioned to the FY 2022 – 2026 Strategic Plan, SuitEA continues to work with WPI and HRS to identify ways to integrate and improve the flow of HR and vetting related data within the updated systems in a manner that will improve efficiencies for agencies in hiring and personnel vetting, building on the work begun under Goal 1 of the FY 2018 – 2022 Strategic Plan.

Beginning in FY 2023, SuitEA contributes to Goals 1, 2, and 4 of the FY 2022 – 2026 Strategic Plan, specifically to the following objectives as described:

*Objective 1.1 -Achieve a Federal workforce that is drawn from the diversity of America by supporting agencies in fostering diverse, equitable, inclusive and accessible workplaces;*

Beginning in FY 2022 and continuing into FY 2023 and FY 2024, SuitEA will contribute to Objective 1.1 through suitability and credentialing program government-wide efforts. In accordance with the requirements of President Biden’s National Security Memorandum – 3 and Executive Order 14035, working with the Performance Accountability Council (PAC) and Office of the Director of National Intelligence (ODNI), SuitEA will take steps to eliminate bias in the vetting process and mitigate barriers in background investigation processes for LGBTQ+ employees and applicants, in particular transgender, gender non-conforming, and non-binary employees and applicants. In FY 2023, OPM proposed modifications to personnel vetting investigative questionnaires to incorporate language that is inclusive for all applicants; these changes, were approved in FY 2024 and will be implemented in personnel vetting systems.

*Objective 2.6 –Promote a positive organizational culture where senior leadership lives the OPM values, drives an enterprise mindset and supports employee engagement;*

SuitEA supervisors will work with employees to identify ways to promote a positive organizational culture within SuitEA and across organizational boundaries within OPM, with a specific focus on actions that reflect OPM’s values of Respect, Innovation, Service, and Excellence. This will include an examination of ways to foster DEIA within SuitEA. In addition, SuitEA supervisors will identify means to operate SuitEA with an OPM enterprise mindset, including collaboration and communication among different work units to achieve agency goals. For example, in FY 2022 and FY 2024, SuitEA requested and was selected to participate in HCDMM’s innovation pilot project. In FY 2023, SuitEA was selected to pilot a Peoples First Mentoring initiative aimed at improving the employee experience thus having a positive effect on the customer experience. Additionally, SuitEA has eagerly approached an activity happening across OPM involving the development of employee engagement plans informed by responses to the Federal Employee Viewpoint Survey. Through the plan, SuitEA has developed and enhanced methodologies for improving communication, recognizing exceptional performance, and increasing opportunities for employee development. In FY 2024 SuitEA will contribute to OPM’s assessment of its state of DEIA through data analysis and plans to act as a pilot program in order to create a model for the rest of OPM. These activities will carry into FY 2025.

*Objective 4.2 - Improve efficiency of Government-wide policy work by shifting to more strategic, risk-based delegations of authorities to agencies, increasing the percentage of low-risk, high-volume transactions delegated to agencies.*

SuitEA, as a deputy strategic objective owner for Strategic Objective 4.2, is working with other

OPM program offices to implement recommendations by the National Academy of Public Administration (NAPA) in their report of the study of OPM, its mission, organizational structure, and challenges. Specifically, NAPA recommended that OPM adopt a more decentralized and risk-based approach to executing its transactional approval and oversight responsibilities by delegating, to the maximum extent possible, decision-making authorities to agencies and conducting cyclical reviews to facilitate compliance with relevant laws, regulations, and policy guidance. NAPA also recommended that Congress review and amend statutory mandates requiring OPM to conduct transactional approval and oversight and, to the maximum extent practical, authorize OPM to develop an alternative approach to carrying out its transactional approval and oversight responsibilities. In FY 2022, SuitEA worked with MSAC, WPI, CLIA, CHCO, and OGC to complete a review of transactional approval activities, including those identified by NAPA, and delegated authorities the Chief Human Capital Officers have requested. These reviews informed identification and assessment of transactional approval activities that OPM agrees are appropriate for OPM to delegate where it may do so and those that are appropriate for Congress to authorize OPM to delegate. In FY 2022, SuitEA assisted WPI, MSAC, CLIA, and OGC in identifying items for legislative proposals for FY 2023 and FY 2024. SuitEA will continue to work with the co-owners of the objective to identify additional delegations that may be appropriate.

## Human Resource Solutions

Human Resources Solutions (HRS) provides customized human capital products and services to support Federal agencies with meeting mission objectives. HRS human capital experts, along with private sector strategic partners, deliver HRS services to assist agencies with their human capital management requirements. HRS serves a range of agencies across the Federal Government, including cabinet-level, small, and independent agencies. State, local, tribal, and international governments also benefit from HRS offerings.

HRS fully supports Administration and OPM priorities, including the implementation of the Infrastructure Investment and Jobs Act (IIJA), P.L. 117-58 (Nov. 15, 2021), also referred to as the Bipartisan Infrastructure Law (BIL), a once-in-a-generation investment in our nation's infrastructure and competitiveness. A major factor contributing to a successful implementation of the IIJA is the ability of IIJA agencies to surge recruitment and hiring activities to fill a variety of essential positions, including mission-driven roles.

HRS provides guidance and project management expertise to IIJA agencies (e.g., USDA, Commerce, Energy, EPA, Interior, and Transportation) and plays an important role in supporting

IIJA agencies' talent acquisition, and training needs. HRS collaborates with other OPM programs (e.g., ES, MSAC) to support IIJA hiring agencies in areas including:

- Recruiting for mission-critical occupations;
- Building high-performing staff capacity through technical training courses and on-the-job activities;
- Hosting webinars on topics within the Talent Surge Executive Playbook to assist with the development of Hiring Surge Plans;
- Developing agency branded career sites on USAJOBS;
- Piloting and establishing sponsor level partnerships with a variety of national organizations, universities, and Federal agencies to promote IIJA occupations and source candidates to build a pipeline for IIJA opportunities;
- Establishing an OPM enterprise analytics platform to enable integration of IIJA data across programs, improving the timeliness and accessibility of key data assets through dashboards/data products to improve agency decision-making; and
- Providing other practical solutions to meet IIJA agency human capital needs.

#### Center for Leadership Development (CLD) (Strategic Goals 1.3, 3.1, 3.2, 3.4, 4.1, 4.4, and 5.1 Additional Mission Activities):

The Center for Leadership Development consists of eight (8) distinct solution areas, the Federal Executive Institute, the Eastern and Western Management Development Centers, the Federal HR Institute, the Presidential Management Fellows program, the Lab at OPM, the Process and Performance Improvement Program, and USA Learning, which provide open enrollment (interagency) and custom (single agency) learning opportunities in virtual, residential, and blended modalities. All programs and courses are designed to provide leadership and professional development to government employees at various stages of federal careers while providing agencies flexibility and capacity to offer a complete range of leadership and professional development. CLD partners regularly collaborate with other OPM entities and agencies to deliver blended services. All training, including the flagship Leadership for a Democratic Society (LDS) program, resumed in-person residence offerings at increased capacity and will likely continue in FY 2025 and beyond. CLD expects to retain program customers and grow the number of offerings based on demand and targeted marketing efforts.

CLD's professional development programs continue to evolve to meet the changing needs of Federal leaders. Given the focus on customer experience (CX) driven by the President's Management Agenda and Executive Order on Transforming Federal Customer Experience and Service Delivery (EO 14058), CLD projects an increased demand and delivery across all programs. Staffing levels are continuously assessed, while considering program growth and optimal operating levels for efficiency and strategic planning. The objective is to train and educate greater numbers of Federal employees in FY 2025 and diversify the number of agency-specific learning solutions via the following CLD solutions:

**The Federal Executive Institute (FEI)** develops visionary leaders to improve the performance of government agencies through programs that support federal executives in understanding their role within the government's constitutional framework.

**The Eastern Management Development Center's** interagency leadership development courses guide Federal employees through a career-spanning process of leadership development, from aspiring leader to senior executive.

**The Western Management Development Center's** custom leadership solutions help transform agencies' most immediate leadership challenges into opportunities.

**The Federal HR Institute (FHRI)** offers a comprehensive curriculum in staffing, classification, and pay setting and aims to create an agile, competent Federal HR workforce well-positioned to carry out merit-based and competitive hiring activities.

**The Presidential Management Fellows (PMF)** program is the Federal Government's flagship leadership development program for advanced degree holders across all academic disciplines.

**The Lab at OPM** helps government organizations transform their programs, processes, and people through human-centered design.

**The Process & Performance Improvement Program** partners with agencies to determine root causes of challenges, use data to drive improvement decisions, and pivot processes away from low-value work, allowing a focus on more intellectually engaging work.

**USA Learning** provides clients with customized Learning Management Systems, Online Forums, Executive Coaching, access to online course libraries, custom course development, hosting and help desk support, technical support services, online assessments, and virtual conferencing.

CLD's pricing structure is a full-cost recovery model within a Revolving Fund activity. Before commencing operations each fiscal year and periodically during the year, CLD analyzes planned delivery schedules based on historical and projected customer demands. Prices are determined through detailed financial analysis focused on ensuring total cost recovery in a reimbursable business environment. CLD continues to offer virtual, hybrid, and in-person modalities to ensure course delivery formats are flexible and accessible in meeting customers' requirements.

### CLD Fee Structures and Pricing:

- Fixed price for interagency catalog courses.
- Individual program expenses (PMF fee maintained FY 2022 price of \$8,000 per PMF hire).
- Customized / single agency and project-based capabilities priced based on unique customer specifications.
- Direct vendor costs for services requested plus a management fee of 8% to 15% (USA Learning).

### Federal Staffing Center (OPM Strategic Plan Objective 1.3, 3.2, and 5.1 Additional Mission Activities):

The Federal Staffing Center (FSC) partners with agencies to hire high-quality, diverse talent to meet their missions by providing the full range of talent acquisition products and services in alignment with the Acquire stage of the Human Resources (HR) lifecycle. FSC comprises a nationwide network of HR professionals, account managers, designers, CX strategists, business analysts, project managers, IT professionals, and data analysts who deliver talent acquisition solutions across five programs: USAJOBS®, USA Staffing®, USA Hire<sup>SM</sup>, Staff Acquisition, and Talent Acquisition Analytics.

FSC will continue to focus on activities to advance the President's Management Agenda and OPM strategic priorities. This includes:

- Supporting agency talent surge requirements for the Bipartisan Infrastructure Law.
- Serving as a goal owner for OPM Strategic Objective 3.2 and implementing associated activities, including making refinements to improve the USAJOBS applicant experience, enhancing applicant communications, and increasing personalization through Search Engine Optimization and AI/ML prototypes.



- Providing tailored USAJOBS resources for early career recruitment.
- Supporting pooled hiring efforts across Government through the USAJOBS Agency Talent Portal talent pools feature and through managing cross-government hiring actions.
- Deploying key technology features and enhancements (e.g., PowerBI reports and dashboards, streamlined hiring experiences, new interconnections with agency HRIT solutions, additional Candidate Inventory capabilities, and user experience improvements for the HR and Hiring Manager communities).
- Scaling USA Hire online assessments for agencies to improve the quality of hires across government in alignment with EO 13932, including implementing new capabilities such as online interviewing.
- Providing surge staffing, recruitment and branding, and technical training services for agencies.
- Expanding the Scholarship for Service Program.
- Completing the Government Accountability Office (GAO) performance audit of USA Staffing.

#### FSC Fee Structures and Pricing:

FSC uses two main fee structures: user fees (systems) and fixed rate (talent acquisition services). User fees are annual subscriptions based on the number of customer licensed HR users or the number of FTEs in the organizations.

- USAJOBS charges an annual seeker portal fee based on the agency's FTE count. USAJOBS charges an annual Operations and Maintenance fee for communities on the Open Opportunities website and for career sites.
- USA Staffing charges a per-HR-user fee for all-inclusive access to the system. The USA Staffing license fee for FY 2025 is \$8,954. A growing customer base enables FSC to achieve greater economies of scale through shared service delivery.
- USA Hire uses a mix of fee structures based on assessment type: 1) fee based on a percentage of the USA Staffing user fee; 2) fixed rates; 3) per applicant testing fees.
- Staff Acquisition's pricing structure is based on the time and resources (salaries, benefits, recurring costs, and infrastructure support) associated with delivering staffing

services through tasks supporting a hiring action and factored as an hourly consultant rate.

### HR Strategy and Evaluation Solutions (HRSES) (Strategic Goal 1.3, 4.3, and 5.1 Additional Mission Activities):

HR Strategy and Evaluation Solutions (HRSES) provides organizational and individual focused strategies to help agencies plan and position for maximum performance. HRSES includes the Assessment and Evaluation Branch (AEB) and HR Strategy (HRSTRAT). HRSES' consulting and assessment services are mature and are expected to fully cover all associated costs, including the USA Performance® (USAP) software-as-a-service offering with its extensive customer base. USAP expects to significantly grow its user base and continues to implement APIs with agency core personnel systems resulting in better data exchange, while improving data sharing for optimized use and visualization.

### HRSES Fee Structures and Pricing:

HRSES pricing is scalable, based on quantities of specific products or services (ex. number of participants being assessed) and the selection of optional services. Pricing for products and services are driven by labor costs to deliver each product or service plus an overhead expense allocation for full cost recovery.

Pricing for HRSES products and services are based on one of three models:

- Fixed price for off-the-shelf products and services, to include user licenses for software-as-a-service based on user base size and aggregated program costs
- Customized solutions built upon existing products and services priced by customer specifications
- Services and consultation available on retainer

### Human Capital Industry Solutions (HCIS) (Strategic Goals 1.3, and 5.1 Additional Mission Activities):

The HCIS program employs public/private partnerships to deliver private sector human capital and training services and assisted acquisition program management services, to Federal agencies through three Multiple Award, Indefinite Delivery/Indefinite Quantity (MA/IDIQ) contract vehicles (HCaTS Unrestricted, HCaTS Small Business, and HCaTS 8(a)) in the areas of Training and Development, Human Capital Strategy and Organizational Performance Improvement. HCIS supports the continual improvement of human capital and training

investments and plays a vital role in fulfilling OPM's mandate to provide these services to agencies under 5 U.S.C. §§ 1104, 1304, and 4116, as well as Executive Order 11348.

The HCIS costs associated with delivering assisted acquisition services to federal agencies for acquiring human capital and training services from strategic partners is recovered through an assisted acquisition services fee schedule. To date, costs have not been fully recovered. To cover these costs and to ensure cost competitiveness, HCIS completed a comprehensive review of the program to achieve full cost recovery for HCIS. This led to a change in fee structure for new projects from being based on potential maximum task order value as determined by the independent government cost estimate (IGCE) for the life of the award to the actual dollar value on the Interagency Agreement funding document 7600B.

### HCIS Fee Structures and Pricing:

HCIS uses a tiered fee structure for assisted services. In addition, a Contract Access Fee (CAF), payable to GSA as the contract owner, of 0.75% is assessed on every project whether through HCaTS Assisted or Direct. The tiers consist of the following with the median fee shown for each dollar threshold:

- \$500K to \$2.499M: 10%
- \$2.5M to \$9.999M: 7%
- \$10M to \$19.999M: 5%
- \$20M+: 3%

### Center for Management Services (HRS Support Programs) (Strategic Goals 2.3, 2.5, 3.3, 4.1, and 5.2 Additional Mission Support Activities):

The Center for Management Services (CMS) supports HRS service delivery across the enterprise, providing corporate-level resource management, business development, and enterprise business services. The net effect of CMS services is an HRS enterprise-wide approach to the management of its people, finances, outreach, and effective management of cross-OPM and cross-practice area initiatives.

## HRS Financials

### Value of Anticipated HRS Agreements

- FY25 = \$424.8M
- FY26 = \$448.7M

- FY27 = \$462.3M

## New Business Justification

### Center for Leadership Development (CLD)

CLD will continue to leverage the strategies and resources that have yielded quantitative success and practice area growth. One solution area primed for transformational advancement is FHRI, CLD will re-brand and posture the program as the premier HR training source to the universe of federal HR professionals by loosely modeling the Federal Acquisition Institute (FAI) training roadmap. The FEI prestigious flagship LDP program is projected to sustain record high levels of in-residence participant enrollment (average 73-83 enrollees). Open enrollment, custom programs, and USA Learning portfolios will benefit from a demand driven approach to product/content offerings as well as leading edge technological investments. We will hone the business development skills proven to be beneficial in deepening customer relationships with federal agencies while growing the leadership learning and training portfolio to more than \$202M in revenue for FY 2025.

### FSC

**USAJOBS** will continue working to improve the USAJOBS customer experience. As a designated High Impact Service Provider (HISP), USAJOBS will leverage user research, iterative prototyping, and testing to deliver value added features. USAJOBS will expand recruitment tools and streamline processes so agencies can use USAJOBS to attract high-quality and diverse talent.

**USA Staffing** will support agency system implementation activities for agencies who have determined USA Staffing best meets their talent acquisition system requirements.

**USA Hire** will continue helping agencies expand their use of modern, competency-based assessments to meet the requirements of EO 13932.

**Staff Acquisition** will continue providing surge staffing services and recruitment and branding services for agencies while expanding support to student hiring programs such as the Scholarship for Service Program.

**Talent Acquisition Analytics Group (TAAG)** will provide applicant flow data to support agency recruitment and hiring efforts and work with the Equal Employment Opportunity Commission to expand the resources and training provided to agencies to collect, analyze, and use Applicant Flow Data to identify barriers in the hiring process. TAAG will continue providing talent

acquisition analytics capabilities (Power BI reports, dashboards, etc.) for federal agency customers and to support OPM hiring priorities.

## HRSES

HRSES will continue expanding its technology capabilities – namely USA Performance – and the products and services delivered using those systems. HRSES expects to continue seeing aggressive growth in the USA Performance user base in FY 2024 through FY 2026.

HRSES psychologists will continue to build new content for the USA Hire online assessment platform, providing even more online assessment options for agencies.

HRSES will continue to partner with FSC to integrate the classification component of USA Staffing with customer agency classification functions to fully implement while updating their position description libraries.

HRSES will continue capitalizing on its employee experience and hybrid workforce management capabilities to further increase the effectiveness of Federal Government.

HRSES will expand its existing change management offerings to include capabilities from across HR Solutions to increase the Federal Government’s ability to manage and execute major organizational changes brought on by a new future of work and new organizational processes/structures to support it.

## HCIS

HCIS plans to deliver on existing agency engagements through the execution of option periods. The majority of existing HCIS activities are task order based and are structured with a base year and four option periods. The HCIS team is actively engaging agencies to support administration priorities, specifically streamlining agency access to industry experts toward the increased use and implementation of hiring assessments.

HCIS has observed other Federal agencies move to provide assisted acquisition services as well as a trend towards increased reliance on internal contracting. Agencies that use internal contracting offices or receive non-OPM support do not benefit from the human capital knowledge and human capital specific acquisition experience of OPM, which creates an opportunity for HCIS to educate customers while providing value to the agencies HCIS supports.

## Enterprise Human Resources Integration (EHRI)

Enterprise Human Resources Integration (EHRI) comprises two programs, the electronic Official Personnel Folder (eOPF) and Enterprise Human Resources Integration Data Warehouse (EHRIDW), supporting the e-Government initiative designed to leverage the benefits of information technology, as required by the E-Government Act of 2002. The goal of these two programs is to streamline and automate the collection, aggregation, and sharing of Federal workforce and employee HR, payroll, and training information Government-wide. The investment broadly supports the OPM mission by enabling the agency to provide the Federal HR community with access to employee data to improve workforce planning for hiring, skills development, retention strategies and Government-wide policy.

The electronic Official Personnel Folder (eOPF) is a sub-program to the EHRI major investment supporting the e-Government initiative to leverage the benefits of information technology, as required by the E-Government Act of 2002. The goal of eOPF is to streamline and automate the collection, aggregation, and maintenance of official career lifecycle documents created during Federal employment. The investment broadly supports the OPM mission by enabling the agency to provide the Federal HR community and employees with access to employee and workforce data to improve workforce planning for hiring, skills development, retention strategies, and Government-wide policy.

The eOPF system is a web-based application that stores, processes, and displays career lifecycle documents of current Federal Employees who have an eOPF. The system has replaced many manual HR processes by automating numerous agency HR processes and creating a streamlined Federal HR document system for Federal employees. The eOPF covers Title 5 Executive Branch departments and agencies, with some exceptions, as well as some components of the Legislative, Judiciary, and other independent agencies and organizations, with a total user population of 2.4 million. The eOPF application is provided through a fee-for-service arrangement with participating agencies. For FY 2025, EHRI anticipates Revolving Fund agreements in the amount of \$22,176,980 and expenses for eOPF support, scanning services and new investments for modernization totaling approximately \$40,000,000. The agency pricing structure for eOPF maintenance is a fixed price per license based on the number of active users at the customer agency. The eOPF license maintenance, paid annually by the customer, covers the following:

- Program Management Office support

- Contract administration
- IT security
- OPM Common Services
- Credit monitoring
- Software license renewals and maintenance
- Record storage and transfer services provided by the National Personnel Records Center
- IT infrastructure hosting and maintenance services
- Product development
- Document scanning
- Helpdesk services

In FY 2025, EHRI/eOPF will continue to develop and implement a roadmap to modernize the program and provide agencies with a cost-efficient system of records to maintain official employee documentation electronically. This will include a redesign of eOPF and EHRIDW into a single enterprise analytics and service delivery platform providing access to a broader scope of data for employees and agencies, with a more comprehensive view across the Human Capital lifecycle. EHRI/eOPF will continue to develop and deploy workforce management analytics tools to Federal agency decision-making at scale. Additionally, other Federal employees and HR records management requests continue to come from Agencies including, but not limited to, the employee Emergency Medical Folder (EMF). EMF management, as an example, is an OPM responsibility that has historically been borne by agencies. Recently, agencies have requested that OPM create a system similar to or within eOPF system to manage EMF's. There is thus a need to plan, develop and stand up a system/program to accept and manage these agencies' records in FY 2024.

The success of the eOPF fee-for-service component depends on the continuation of incoming funds through existing and new partner agencies subscribing to eOPF services. These services include program management; providing eOPF training and resources to the human resources community; on-boarding new customers; performing scanning for agencies who request these services; supporting agencies' eOPF folders; maintaining and supporting infrastructure, applications, and software; providing required system security; and operating a user helpdesk.

The EHRI program will continue to develop additional opportunities to share data and data products across platforms, when appropriate, and continue to explore and implement creative user-focused solutions and data products that improve the value of data and records for employees and agency HR specialists. These products will include robust data visualization and analytics products that offer agencies role-based access to granular to improve consistent and efficient access to data, analysis, and insights across agencies.

EHRI/eOPF will continue to onboard new customers, accelerate its current services for new and existing customers, develop customer value focused tools utilizing OPM's data assets and reduce dependence on end-of-life technology. It is expected that the foundation has been set for the implementation of the next generation of human capital services in the Federal Government.

## Human Resources Line of Business (HRLOB) and HR Quality Services Management Office (HR-QSMO)

In 2004, the U.S. Office of Management and Budget (OMB) and Office of Personnel Management (OPM) launched the Human Resources Line of Business (HRLOB) Initiative, for which OPM is the managing partner. The HRLOB leads the transformation and evolution of Federal Human Capital (HC) and its Strategic Framework is aimed at developing a single, integrated Federal Human Resources Information Technology (HRIT) to support the 21st century Federal workforce. The Framework builds on HRLOB's previous success, and when fully implemented, will result in the modernization of HRIT service delivery, improvement of HR data management and standardization, and the effective use of strategic sourcing.

In August 2020, the Human Capital Data Management and Modernization (HCDMM) directorate was created and brought the HRLOB into its structure. Within HCDMM, HRLOB consists of primarily Human Capital Policy Performance and Operations (HCPPO).

In May 2022, OPM was pre-designated by OMB as the HR QSMO and this function has been placed alongside HRLOB within HCDMM. The HR QSMO will establish a marketplace of services and products that enables agencies to improve the delivery of human capital activities in alignment with, and by operationalizing, the HRLOB related standards. The HR QSMO also provides consultative support to agencies and shared service providers (SSPs) who are planning or implementing HR IT modernization efforts. As part of this, the HR QSMO is working to build and maintain an HR IT Inventory and Modernization Roadmap Assessment that provides agencies with market intelligence and identifies opportunities for agencies to plan



collaboratively. The HR QSMO also supports OPM’s Data Strategy through the operation of the Federal-wide Human Capital Data Analytics Community of Practice (CoP), which has been established under the auspices of the CHCO Council. This CoP promotes the adoption of OPM’s government-wide data standards, enables agencies to share data analytics and visualization solutions, and aids in a community-wide upskilling effort aimed at improving agencies’ ability to use human capital data as a strategic asset. HRQSMO is currently aligned with appropriated funds; however, there is potential for HRQSMO to become a Revolving Fund activity in FY 2025.

## Human Resources Solutions Information Technology Program Management Office

The HRS Information Technology Program Management Office (HRS IT PMO or PMO) provides technology support in the form of IT systems development and hosting, supplying both internal and external customers with a wide variety of information technology services in the human resources arena. No new business is anticipated; however, enhancements will be made to improve the existing customer and end-user experience. Major initiatives that constitute the “enhanced” customer and end-user experience include, but are not limited to:

- Continuing refactoring efforts from SaaS to PaaS solutions such as the move from SQL Managed Instance to Azure SQL
- Cloud Migration
- Defining requirements for self-service customizable dashboards and reports so agencies can easily access their data and conduct analysis
- Application streamlining
- Optimizing the back-end systems to improve performance and better meet users’ needs
- Improving the two-factor authentication experience

The PMO expects \$90,000,000 in total agreements in FY 2025 and expects program income of \$88,500,000 with revenue exceeding expenses by \$1,500,000. In FY 2026 and FY 2027, the organization is expecting new agreements of \$91,000,000 and \$92,500,000 respectively.

The basis for these estimates has been established over time and experience. As a result of consulting with HRS’ repeat customers, a thorough understanding of their current and future needs, and a robust internal budgeting process, HRS is able to develop pricing and financial models that have given the PMO a strong financial footing. Challenges to the financial/pricing

model include budgetary limitations of customer agencies, hiring freezes, continuing resolutions and other financial hardships that prohibit customers from timely funding agreements, and uncertainties related to the rollout, timing, and structure of GS-2210 special pay plan(s).

Earned Revenue Over Cost is used to reinvest in products and services for the PMO and/or to hold the revolving fund harmless in the event of liquidation. The HRS IT PMO is expected to have \$12,000,000 in carryover funding in FY 2025. Those funds would be used in event of shut down to pay severance and other separation-pay benefits, career transition services, and other expenses associated with a shutdown (equipment liquidation, broken contracts/leases, etc).

### Credit Monitoring and Identity Protection Services

OPM continues to maintain the Credit Monitoring and Identity Protection Services Program, which was implemented following the cybersecurity incidents OPM announced in 2015. Pursuant to the Consolidated Appropriations Act, 2017 (P.L. 115-31), Section 633 of Division E, OPM is required to provide Credit Monitoring & Identity Protection Services (CM&IPS) through FY 2026 which includes not less than \$5 million in identity theft insurance. Prior to FY 2020, this program was managed through the background investigations program performed by the former National Background Investigations Bureau of OPM.

Accordingly, OPM began offering these services to impacted individuals as of July 1, 2015. Currently, CM&IPS are provided by Identity Theft Guard Solutions, Inc., doing business as IDX, awarded under the General Service Administration's Identity Protection Services (IPS) Multiple-Award Blanket Purchase Agreement (BPA). This award will have a possible full period of performance of five years, which will continue to provide coverage to all impacted individuals through June 2024.

CM&IPS costs consist of the contract described above as well as operational, management, and administrative costs. There are two funding sources for the program. OPM collects annually from the largest Federal agencies via an Inter-agency Agreement (IAA) based on a proportional allocation of the total program cost. The basis for distribution is the number of background investigations historically ordered by each agency. Additionally, fees are collected by the Enterprise Human Resource Integration (EHRI) program as part of the eOPF rates charged to agencies to fund the CM&IPS program.

The CM&IPS program provides a comprehensive suite of credit and identity monitoring, identity theft insurance, and identity restoration services. The FY 2025 costs are projected to be \$98,398,169 for the following:

Credit Monitoring & Identity Protection Services – The BPA Call awarded to IDX included a one-year base period and four one-year option periods. There is a \$5.2M increase budgeted for FY 2025 as the BPA Call will be recompleted and an increase in costs is anticipated.

Verification Center Operations – The Verification Center is provided through an assisted acquisition, funded by OPM, through an interagency agreement with DOD’s Defense Manpower Data Center (DMDC). There is a \$300K increase budgeted for FY 2025 as the assisted acquisition contract was recompleted and the bids received were higher than for the previous contract.

Verification Letters – The determinations of impact status that are generated by the Verification Center are communicated to requestors by letter sent via the US Postal Service. Currently, DOD’s Defense Logistics Agency (DLA) prints and sends these notification letters. These letters include the 25-digit PIN which is necessary to enroll in the services provided.

CM&IPS Program Office – In managing the CM&IPS Program there are additional administrative costs incurred related to salaries and benefits, training, and site visits. The CM&IPS program office consists of four FTEs, including labor by other offices throughout the agency which is charged to the CM&IPS program.

These activities are Congressionally mandated as they support the provision of comprehensive, complimentary identity protection coverage pursuant to P.L. 115-31.

## Federal Executive Boards (FEB)

As described in the President’s FY 2023 Budget, agencies have been directed to contribute funds to OPM to support administration of the Federal Executive Board (FEB) program. The reinvigorated vision for FEBs and the new interagency funding model standardizes and enhances FEB programming across the Nation to assist agencies in strategic and collaborative efforts outside the Washington, DC area. The revitalized FEB program will utilize a shared funding model that uses annual proportional contributions from CFO Act Agencies based on the number of employees outside Washington D.C.

## Office of the Inspector General

The U.S. Office of Personnel Management (OPM) Office of the Inspector General (OIG) fiscal year (FY) 2025 Budget request totals \$42,700,000. This amount is comprised of \$7,144,000 from the Salaries and Expenses (S&E) General Fund and \$35,556,000 from the OPM Trust Funds.

The OPM OIG greatly appreciates the support that Congress has shown the OPM OIG through the annual appropriations process. The OPM OIG respectfully requests that Congress continue to make the OPM OIG a funding priority in FY 2025.

### *Fiscal Year 2025 Budget Request*

	Salaries & Expenses		Trust Fund		Total	
	\$	FTE	\$	FTE	\$	FTE
FY 2024 Annualized CR Base	\$6,908,000	22.0	\$29,497,000	143.0	\$36,395,000	165.0
FY 2025 CBJ Adjustments to Base	\$236,000	0.0	\$2,438,000	0.0	\$2,674,000	0.0
FY 2025 CBJ Program Increases	\$0	0.0	\$3,631,000	18.0	\$3,631,000	18.0
<b>FY 2025 CBJ Total Increases</b>	<b>\$236,000</b>	<b>0.0</b>	<b>\$6,069,000</b>	<b>18.0</b>	<b>\$6,305,000</b>	<b>18.0</b>
<b>FY 2025 CBJ Total Request</b>	<b>\$7,144,000</b>	<b>22.0</b>	<b>\$35,566,000</b>	<b>161.0</b>	<b>\$42,700,000</b>	<b>183.0</b>

The OPM OIG's FY 2025 discretionary budget request represents a \$6,305,000 (17.3 percent) increase over FY 2023 enacted levels. This amount is comprised of the following:

#### **Adjustments to Base**

Over 40 percent of the requested increase is needed to maintain current oversight work, including meeting government-wide obligations to fund previously-enacted federal employee pay increases and required adjustments to employee health benefit contributions. This includes a 5.2 percent 2024 federal pay raise and 2.0 percent 2025 federal pay raise consistent with the President's pay proposal.

### **Program Increase - Oversight of the Postal Service Health Benefits Program**

The OPM OIG continues to have a critical need to fund oversight of the OIG's implementation of the Postal Service Reform Act of 2022 (Public Law No. 117–108). The law establishes a new Postal Service Health Benefits Program (PSHBP) within OPM's Federal Employees Health Benefits Program (FEHBP). Congress appropriated \$70,500,000 (for 2022 until expended) to OPM to implement the requirements of the law. It is essential that the OPM OIG's oversight work be resourced commensurate with OPM to ensure that the development, implementation, and administration of the PSHBP is conducted in a secure, effective, and efficient manner by OPM. The PSHBP risks annual losses of millions of taxpayer dollars due to fraud, waste, or abuse as the program begins enrollment and disbursing benefits. It faces similar risks as the FEHBP of health care fraud schemes and improper payments. The FEHBP already pays tens of millions of dollars annually in improper payments.

### **Program Increase - OPM OIG Data Analytics Program**

In its 2022 budget request, the OPM OIG outlined a comprehensive vision for implementing an advanced data analytics program to help proactively detect fraud, waste, and abuse in the FEHBP. Although the OPM OIG was able to partially fund this initiative with its increased 2023 appropriations, it cannot fully migrate to a proactive oversight model (one where data generates audit/investigation leads on suspected fraud and improper payments) until this program is fully funded with the information technology and personnel needed to support it.

The OPM OIG collects, stores, and analyzes billions of highly sensitive medical claim records from individuals participating in the FEHBP. The data originates from the various individual private health insurance carriers that participate in the FEHBP (e.g., BlueCross BlueShield, Aetna). The OPM OIG's information systems provide an integrated view of the FEHBP population (including in 2025, the PSHBP), and no other entity possesses a consolidated claims data repository like that owned and operated by the OPM OIG. The OPM OIG has developed a unique data engineering program with complex data extraction and manipulation processes catered towards staging the FEHBP claims data for downstream data science methods such as artificial intelligence and machine learning. It is imperative that the OPM OIG establish a mature data analytics program separate and distinct from any government shared service analytics program.

### **Program Increase - Inspector General Independence**

The OPM OIG's 2023 budget request outlined the need to establish the Inspector General as operationally independent from the Director of OPM. The Inspector General Act of 1978, as amended, commonly known as the IG Act, identifies Inspector General independence as

necessary for effective oversight. Congress has continuously prioritized legislation that enhances IG independence. Independence is essential to ensuring the OIG is able to efficiently and effectively audit, evaluate, review, and investigate agency fraud, waste, abuse, and mismanagement.

The OPM OIG operates independently in many areas (e.g., information technology and procurement) but is still heavily dependent on OPM for Human Resources (HR) and Legal Services. As a result, the OPM OIG is bound by OPM's policies, procedures, and time frames. For example, OPM OIG like other offices within OPM procures HR services to recruit and onboard critical personnel for the organization. The requested appropriation will provide the bandwidth to handle OPM OIG matters exclusively with necessary and appropriate urgency.

When HR-related legal needs arise, the OPM's Office of General Counsel remains the official counsel of record and represents the IG, which is in conflict with the IG Act's requirement that an IG "obtain legal advice from a counsel either reporting directly to the Inspector General or another Inspector General." While the OPM OIG has a strong working relationship with OPM, it is only one of OPM's many consumers of HR and Legal Services. Recent process changes have allowed for the OIG counsel to engage in some matters. The OIG is still working toward formalizing a permanent structure where OIG counsel represents the organization independently of the agency. The current arrangement represents a conflict of interest and weakens the OPM OIG's full independence. As the oversight body for the agency, the OPM OIG could potentially be responsible for investigating individuals that represent the office in HR and litigation actions.

#### **Program Increase - Ensuring Diversity, Equity, Inclusion, and Accessibility (Interns)**

In accordance with Section 6 of President Biden's Executive Order 14035 on Diversity, Equity, Inclusion, and Accessibility (DEIA) in the Federal Workforce, the OPM OIG intends to grow its paid internship program. The OPM OIG program will expand the organization's current outreach to underserved segments of society by providing opportunities for its participants to build the competencies needed to successfully compete in today's workforce.

## Details of FY 2025 Budget Request

The table below outlines the \$6,305,000 increase that the OPM OIG requests for FY 2025 (\$236,000 Salaries and Expenses, \$6,069,000 Trust Fund Annual).

### FY 2025 Requested Increases

Adjustments to Base	Fund	FY 2025 CBJ (Millions)	FTE
<b>1. Pay Raises</b>		<b>\$2.000</b>	
<i>a. Pay Raise – S&amp;E</i>	<i>Salaries and</i>	<i>\$0.169</i>	
<i>b. Pay Raise – Trust Fund Annual</i>	<i>Trust Fund Annual</i>	<i>\$1.831</i>	
<b>2. Benefit Increases</b>		<b>\$0.674</b>	
<i>a. Benefit Increases – S&amp;E</i>	<i>Salaries and</i>	<i>\$0.067</i>	
<i>b. Benefit Increases – Trust Fund Annual</i>	<i>Trust Fund Annual</i>	<i>\$0.607</i>	
<b>Subtotal, FY 2025 CBJ Adjustment to Base</b>		<b>\$2.674</b>	<b>0</b>
Program Changes (Increases)	Fund	FY 2025 CBJ (Millions)	FTE
<b>1. Oversight of the Postal Service Health Benefits Program (PSHBP)</b>		<b>\$2.612</b>	<b>13</b>
<i>a. PSHBP - Auditors</i>	<i>Trust Fund Annual</i>	<i>\$0.759</i>	<i>4</i>
<i>b. PSHBP - Investigators</i>	<i>Trust Fund Annual</i>	<i>\$1.372</i>	<i>6</i>
<i>c. PSHBP - Evaluations Program Analyst</i>	<i>Trust Fund Annual</i>	<i>\$0.190</i>	<i>1</i>
<i>d. PSHBP – Information Technology Specialists</i>	<i>Trust Fund Annual</i>	<i>\$0.291</i>	<i>2</i>
<b>2. OPM OIG Data Analytics Program</b>		<b>\$0.522</b>	<b>1</b>
<i>a. Data Scientist / Chief AI Officer</i>	<i>Trust Fund Annual</i>	<i>\$0.146</i>	<i>1</i>
<i>b. Artificial intelligence and Machine Learning</i>	<i>Trust Fund Annual</i>	<i>\$0.376</i>	<i>0</i>
<b>3. Inspector General Independence</b>		<b>\$0.356</b>	<b>2</b>
<i>a. Human Resources Specialist</i>	<i>Trust Fund Annual</i>	<i>\$0.191</i>	<i>1</i>
<i>b. Attorney</i>	<i>Trust Fund Annual</i>	<i>\$0.165</i>	<i>1</i>
<b>4. Ensuring Diversity, Equity, Inclusion, and</b>		<b>\$0.141</b>	<b>2</b>
<i>a. Interns</i>	<i>Trust Fund Annual</i>	<i>\$0.141</i>	<i>2</i>

<b>Subtotal, FY 2025 CBJ Program Changes</b>		<b>\$3.631</b>	<b>18</b>
<b>Total FY 2025 CBJ Requested Increase</b>		<b>\$6.305</b>	<b>18</b>

The following sections detail the \$6,305,000 increase requested by the OPM OIG.

### **Adjustment to Base**

An increase of \$2.674 million (42 percent of the requested total increase) will provide for pay adjustments, inflation, and other adjustments to base necessary to maintain the OPM OIG’s current oversight portfolio. Base Adjustments include:

1. An increase of \$2.0 million to provide for pay increases for non-congressionally confirmed OPM OIG personnel. This includes an assumed federal adjustment effective January 2025 of 2.0 percent and annualizing the January 2024 adjustment of 5.2 percent.
  - a. \$0.169 million Salary and Expenses.
  - b. \$1.831 million Trust Fund Annual.
  
2. An increase of \$0.674 million to account for required inflationary adjustments to employee health benefit contributions.
  - a. \$0.067 million Salaries and Expenses.
  - b. \$0.607 million Trust Fund Annual.

### **Program Changes**

An increase of \$3.631 million (58 percent of the requested total increase) is for program increases, including:

1. An increase of \$2.612 million for 13 Full Time Equivalent (FTE) is needed by the OPM OIG to ensure the oversight of the development, implementation, and administration of the Postal Service Health Benefits Program within OPM’s Federal Employees Health Benefits Program.
  - a. \$0.759 million for 4 Auditor positions to conduct continuous oversight and periodic audits during the development and implementation of the PSHBP.
  - b. \$1.372 million for 6 Investigative positions to examine potential procurement fraud, prohibited personnel practices, ineligible member enrollment, or other



financial violations such as health care fraud that can occur once the PSHBP begins disbursing benefits.

- c. \$0.190 million for 1 Evaluations Program Analyst to evaluate OPM's execution of establishing the OPM PSHBP program.
  - d. \$0.291 million for 2 Information Technology Specialists to provide routine technical support to include assisting in the management of the audit workpaper and investigative case management software used to support PSHBP oversight work.
2. An increase of \$0.522 million, including 1 FTE and contract support, is needed by the OPM OIG to fully establish a mature data analytics program separate and distinct from any other shared service analytics programs in government.
    - a. \$0.146 million for 1 Data Scientist.
    - b. \$0.376 million for Artificial intelligence and Machine Learning system support.
  3. An increase of \$0.356 million for 2 FTEs is needed by the OPM OIG to ensure independence from the OPM OIG parent agency in the areas of Human Resources (HR) and Legal Services.
    - a. \$0.191 million for 1 HR Specialist.
    - b. \$0.165 million for 1 Attorney.
  4. An increase of \$0.141 million for 2 FTEs is needed to increase paid internship opportunities in the OPM OIG. These positions will expand the organization's current outreach to underserved segments of society by providing opportunities for its participants to build the competencies needed to successfully compete in today's workforce.

## ***Additional Reporting Requirements***

### ***FY 2025 Budget Request by Object Class***

#### **Salaries and Expenses by Object Class**

Object Class	FY 2024 Annualized CR	FY 2025 CBJ	Increase/Decrease
Personnel compensation	\$3,251,000	\$3,420,000	\$169,000
Personnel benefits	\$1,015,000	\$1,082,000	\$67,000
Travel and transportation of persons	\$22,000	\$22,000	\$0
Transportation of things	\$0	\$0	\$0
Communications, utilities, and rent	\$1,773,000	\$1,773,000	\$0
Printing and reproduction	\$0	\$0	\$0
Other services	\$847,000	\$847,000	\$0
Supplies and materials	\$0	\$0	\$0
Equipment	\$0	\$0	\$0
Land and structures	\$0	\$0	\$0
<b>Total Object Class</b>	<b>\$6,908,000</b>	<b>\$7,144,000</b>	<b>\$236,000</b>
<b>FTE</b>	<b>22.0</b>	<b>22.0</b>	<b>0.0</b>

#### **Trust Fund Limitations – Budget by Object Class**

Object Class	FY 2024 Annualized CR	FY 2025 CBJ	Increase/Decrease
Personnel compensation	\$17,226,000	\$21,694,000	\$4,448,000
Personnel benefits	\$5,777,000	\$7,001,000	\$1,244,000
Travel and transportation of persons	\$515,000	\$515,000	\$0
Transportation of things	\$10,000	\$10,000	\$0
Communications, utilities, and rent	\$2,543,000	\$2,543,000	\$0
Printing and reproduction	\$20,000	\$20,000	\$0
Other services	\$2,823,000	\$3,200,000	\$377,000

Supplies and materials	\$76,000	\$76,000	\$0
Equipment	\$497,000	\$497,000	\$0
Land and structures	\$0	\$0	\$0
<b>Total Object Class</b>	<b>\$29,487,000</b>	<b>\$35,556,000</b>	<b>\$6,069,000</b>
<b>FTE</b>	<b>143.0</b>	<b>161.0</b>	<b>18.0</b>

### OPM OIG Revolving Fund Oversight

Budgetary Resources	FY 2023 Enacted		FY 2024 Annualized CR		FY 2025 CBJ		Increase/Decrease	
	\$	FTE	\$	FTE	\$	FTE	\$	FTE
Revolving Fund (Estimated)	\$1,545,000	7.0	\$1,600,000	7.0	\$1,662,000	7.0	\$62,000	0.0
<b>OIG Total (dollars)</b>	<b>\$1,545,000</b>	<b>7.0</b>	<b>\$1,600,000</b>	<b>7.0</b>	<b>\$1,662,000</b>	<b>7.0</b>	<b>\$62,000</b>	<b>0.0</b>

#### Revolving Fund

For FY 2025, the OPM OIG estimates that \$1,662,000 for 7 FTEs will be required for OPM Revolving Fund (RF) oversight activities. Currently, the OPM RF consists of the following programs: Human Resources Solutions (HRS), Enterprise Human Resources Integration, Human Resources Line of Business, HRS Information Technology Program Management Office, Suitability Executive Agent, Credit Monitoring and Identity Protection Services, and Federal Executive Boards.

The following information is provided to adhere to the requirements of the Inspector General Reform Act of 2008 (P.L. 110–498):

**Participation in CIGIE Resource Summary – includes all resources (dollars)**

Budget Source	FY 2024 Annualized CR		FY 2025 CBJ		Increase/Decrease	
	\$	FTE	\$	FTE	\$	FTE
OIG Salaries and Expenses	\$24,869	0.0	\$28,576	0.0	\$3,707	0.0
OIG Trust Funds	\$106,153	0.0	\$142,224	0.0	\$36,071	0.0
<b>OIG Total (dollars)</b>	<b>\$131,022</b>	<b>0.0</b>	<b>\$170,800</b>	<b>0.0</b>	<b>\$39,778</b>	<b>0.0</b>

**Training Resource Summary – includes all resources (dollars)**

Budget Source	FY 2024 Annualized CR		FY 2025 CBJ		Increase/Decrease	
	\$	FTE	\$	FTE	\$	FTE
OIG Salaries and Expenses	\$14,973	0.0	\$14,973	0.0	\$0	0.0
OIG Trust Funds	\$218,048	0.0	\$272,048	0.0	\$54,000	0.0
Revolving Fund (Estimated)	\$6,276	0.0	\$6,276	0.0	\$0	0.0
<b>OIG Total (dollars)</b>	<b>\$239,297</b>	<b>0.0</b>	<b>\$293,297</b>	<b>0.0</b>	<b>\$54,000</b>	<b>0.0</b>

## OPM OIG Performance Metrics and Other Statistical Information

### Performance Metrics

The following performance metrics demonstrate how the OPM OIG measures improvements in organizational effectiveness in the accomplishment of its mission and goals.

	FY 2022 Result	FY 2023 Result	FY 2024 Goal	FY 2025 Goal
Percentage of Items Completed on Audit Agenda, in accordance with Yellow Book Standards	100%	94%	90%	90%
Percentage of Audit Reports issued that meet OIG timeliness and quality guidelines	90%	95%	90%	90%
Percentage of investigative cases closed during a fiscal year which resulted in a successful outcome (i.e., criminal action, civil action, or administrative action)	97%	91%	90%	90%
Percentage of quality improvement recommendations (revisions to contracts, policies, carrier letters, etc.) accepted by OIG senior staff and referred to stakeholders to mitigate fraud, waste, and abuse	93%	91%	90%	90%
Percentage of Suspension and Debarment referrals that are issued within OIG timeliness and regulatory standards <sup>A</sup>	NA	99%	90%	90%

<sup>A</sup> New Measure

## Other Statistical Information

The following statistical information demonstrates to the public the impact of the collective efforts of the OPM OIG, OPM, and its contractors in reducing fraud, waste, and abuse. The statistical information reported by the OPM OIG, while indicative of the effectiveness of its oversight, is not solely under the control of or based on the OPM OIG's efforts.

		FY 2021	FY 2022	FY 2023
		Result	Result	Result
Positive Financial Impact Using Questioned Costs		\$72,561,951	\$69,522,235	\$54,709,279
ROI Using Questioned Costs		\$2.40	\$2.28	\$1.73
Positive Financial Impact Using Management Commitment to Recover Funds		\$48,756,232	\$52,404,850	\$41,958,326
ROI Using Management Commitment to Recover Funds		\$1.60	\$1.72	\$1.34
Positive Financial Impact Using Funds Recovered <sup>A</sup>		\$39,104,805	\$47,929,282	\$26,336,828
ROI Using Funds Recovered <sup>A</sup>		\$1.48	\$1.61	\$1.26
FEHBP Audit Cycles (in years) <sup>B</sup>	<u>Target</u>			
Experience-Rated Carrier Audits	7	15	15	12
Community-Rated Carrier Audits	5	17.2	15.1	18.8
Carrier IT Security Audits	6	8.2	7.6	13.6
Audit Recovery Rate <sup>C</sup>		43%	50%	48%
Number of debarments and suspensions		710	850	935
Number of Debarment and Suspension Inquiries		4,479	3,609	2,683

<sup>A</sup>New Statistic

<sup>B</sup>An audit cycle measures the frequency of completed audits of carriers or other auditees in an audit universe. For FEHBP carriers, regulations require that they maintain documentation supporting rates and costs for 6 years. The target audit cycle for these carriers is based on this and the realization that the older the information is that the OPM OIG is trying to audit, the less efficient the audit will be.

<sup>C</sup> The audit recovery rate represents the percentage of questioned costs from audit reports that are ultimately recovered and returned to the FEHBP Trust Fund (a small percentage of questioned costs may relate to other programs). The recovery rate presented is a 5-year average, but because it is not unusual for the audit resolution process of the agency to take multiple years, the reported rate is based on incomplete information.

## **Overview of the OPM OIG**

The OPM OIG was established as a statutory entity on April 16, 1989. It operates under the authority of the Inspector General Act of 1978 (Public Law 95–452), as amended.

The OPM OIG offices provide comprehensive and cohesive oversight of OPM programs. Ongoing key initiatives include identifying and recommending recovery of improper payments related to the FEHBP and retirement annuities, ensuring OPM and its contractors implement critical cybersecurity controls, and using proactive data analytics methods to combat the effects of the COVID-19 pandemic and opioid epidemic on the FEHBP and its enrollees.

The OPM OIG is comprised of the following organizational components:

### **The Office of Audits**

The Office of Audits conducts comprehensive, independent, and risk-based audits of OPM programs, operations, and contractors. One of the office’s core responsibilities is auditing OPM contractors that underwrite and provide health and life insurance benefits to Federal employees, annuitants, and their eligible dependents and survivors through the FEHBP and the Federal Employees’ Group Life Insurance program. There are approximately 200 insurance carriers participating in the FEHBP with annual premium payments that exceed \$50 billion. In addition, we conduct audits of OPM’s Retirement Program, which has over \$1 trillion in net assets available for benefits and makes monthly payments to almost 3 million annuitants and survivors which exceed \$80 billion annually. Audits issued by the office annually lead to the recovery of tens of millions of dollars of improper payments from the OPM trust funds.

### **The Office of Investigations**

The Office of Investigations conducts criminal, civil, and administrative investigations of fraud, waste, and abuse related to OPM programs and operations and investigates OPM employee and contractor misconduct or violations of criminal law. The office actively coordinates with the U.S. Department of Justice and other Federal, State, and local law enforcement authorities on investigations that lead to criminal prosecutions, criminal and civil monetary recoveries,

administrative corrective actions, and exclusions from participation in Federal health care programs and contracts.

### **The Office of Evaluations**

The Office of Evaluations conducts broad, issue-based studies of OPM programs that focus on program effectiveness and rely on in-depth analysis using multiple sources of data. The office combines the scoping and planning of traditional audits with a more reactive nature similar to investigations to quickly respond to high priority issues requiring immediate attention.

### **The Office of Management**

The Office of Management is responsible for managing OPM OIG functions related to information technology (IT), data management, human capital, budget, procurement, and facilities. The OPM OIG independently maintains its own internal IT infrastructure within the broader OPM technical environment, and the office is currently developing an advanced data analytics program to support the OIG's oversight work.

### **The Office of Legal and Legislative Affairs**

The Office of Legal and Legislative Affairs provides legal advice and representation to the IG and OPM OIG employees nationwide. The office also renders opinions on OPM programs and operations; provides legal support for the OPM OIG's internal operations, including personnel and administration; and serves as the liaison to Congress and the media. The Debarring Official also resides within the office and is responsible for suspending and debarring from participation in the FEHBP health care providers who have committed various criminal and professional violations.





# Other Requirements

## Major Management Priorities and Challenges

OPM's major management priorities and challenges are reflected in Goal 2 to transform OPM's organizational capacity and capability to better serve as the leader in Federal human capital management.

- Objective 2.1: Build the skills of the OPM workforce and attract skilled talent. By FY 2026, increase the percentage of OPM employees who agree that their work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals by 3 percentage points.
- Objective 2.2: Improve OPM's relationships and standing as the human capital management thought leader. FY 2026, increase the percent of CHCOs who strongly agree that OPM treats them as a strategic partner by 23 percentage points.
- Objective 2.3: Improve OPM's program efficacy through comprehensive risk management and contract monitoring across the agency. By FY 2026, achieve the OMB-set target for the percentage of spending under category management.
- Objective 2.4: Establish a sustainable funding and staffing model for OPM that better allows the agency to meet its mission. By FY 2026, increase the percentage of OPM managers who indicate that they have sufficient resources to get their jobs done by 4 percentage points.
- Objective 2.5: Modernize OPM IT by establishing an enterprise-wide approach, eliminating fragmentation, and aligning IT investments with core mission requirements. By FY 2026, increase the percentage of software projects implementing adequate incremental development to 95 percent.
- Objective 2.6: Promote a positive organizational culture where leadership drives an enterprise mindset, lives the OPM values, and supports employee engagement and professional growth. By FY 2026, increase OPM's Leaders Lead Score by 3 points.

Please refer to the "Performance Budget by Strategic Goal" section of this document for the planned actions, performance measures and targets, and responsible agency officials for each management priority and challenge.

## Data Validation and Verification

An assessment by the Director of OPM of the reliability and completeness of performance data is included in the agency's Annual Performance Report, released concurrently with this Budget. The report also includes a "Data Validation and Verification" section that includes the steps OPM has taken to promote the accuracy and reliability of the data used to measure progress towards its performance goals, including an identification of the means used to verify and validate measured values, the sources of the data, and any limitations to the data.

The following information is provided in compliance with The Good Accounting Obligation in Government Act (GAO-IG Act), Pub. L. No. 115-414, 132 Stat. 5430 (2019). It describes the agency's implementation status of each of GAO's recommendations to it that has been designated as "open" or "closed, unimplemented.

## Appendix: GAO-IG Act Reporting for Budget Fiscal Year 2025

The Good Accounting Obligation in Government Act (GAO-IG Act, Pub. L. No. 115-414, 132 Stat. 5430 (2019)) requires each agency to include, in its annual budget justification, a report that identifies each public recommendation issued by the Government Accountability Office (GAO) and the agency's inspectors general (IGs) which has remained unimplemented for one year or more from the annual budget justification submission date. In addition, the Act requires a reconciliation between the agency records and the IGs' Semiannual Report to Congress (SAR). In compliance with the GAO-IG Act, OPM provides reports listing each public recommendation from GAO and OPM's Office of the Inspector General (OIG).

## GAO Open Recommendations Report

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
9/17/2012	GAO-12-878	1	Federal Training Investments: Office of Personnel Management and Agencies Can Do More to Ensure Cost-Effective Decisions	To improve federal training investment decision-making processes, the Director of OPM should include in existing or new OPM guidance or technical assistance additional information in the following areas: (1) Steps agencies should take and factors they should consider when prioritizing federal training investments agency-wide, including developing a process to rank training using criteria, such as expected demand for the investment from internal sources, availability of resources to support the effort, potential for increased revenue, and risk of unfavorable consequences if investments are not made. (2) Steps agencies should take and factors they should consider for comparing the merits of different delivery mechanisms and determining the mix of mechanisms to use, in order to ensure efficient and cost-effective delivery of federal training. Such guidance could include requesting that agencies consistently utilize Standard Form-182 to document and report training costs associated with the different delivery mechanisms employed.	OPM has developed training prioritization criteria for agencies that also includes examples of how agencies could rank their training investments. In addition, OPM formed a working group to gain a better understanding of how agencies document, track, and report training information. The group consisted of members from USDA, EEOC, FMC, HUD, PTO, DOD, Energy, USAID, FTC, Treasury, and State. The working group recommended and OPM made changes to the SF 182 designed to help improve federal training investment decision-making. According to OPM, these changes include updating its training sub-type codes to better align with the information being collected and adding additional boxes to assist agencies with tracking group training and receiving complete information on vendors. GAO has asked OPM for documentation on when and how its training prioritization criteria has been disseminated to agencies and also for documentation of instances where OPM has shared good practices in this area with agencies and/or provided agencies a forum for discussing prioritization practices.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
9/17/2012	GAO-12-878	2	FEDERAL TRAINING INVESTMENTS: Office of Personnel Management and Agencies Can Do More to Ensure Cost-Effective Decisions	<p>In line with statutory and regulatory provisions on maintenance and reporting of training information, work with the CHCO Council to improve the reliability of agency training investment information by:</p> <ul style="list-style-type: none"> <li>ensuring that agencies are familiar with and follow guidance outlined in OPM's Guide for the Collection and Management of Training Information regarding which training events should be documented as training and reported to OPM;</li> <li>developing policies to strengthen the utilization of Standard Form-182 to document and report training costs;</li> <li>encouraging agencies through guidance and technical assistance, to develop policies that require consistent reporting of training data to their learning management systems; and</li> <li>encouraging each agency to assess its existing training information system(s) and identify whether it is providing complete and reliable data and, if not, to develop approaches to improve the system(s), in order to do so.</li> </ul>	<p>OPM provided a refresher to the Chief Learning Officers Council on OPM's guidance on Reporting of Training Data. This included reviewing OPM's and agencies' responsibilities for the collection and reporting of data and reviewing the process of how agency data is transmitted to EHRI. Further, OPM highlighted the Guide to Human Resources Reporting as the source for the required format for reporting training data to EHRI and provided the Guide for Collection and Management of Training Information. Both guides are also located on OPM's website. OPM's training data report summaries encourage agencies to review their data, to check for submission errors and consistencies in reporting, and to validate that all training events are included. GAO asked OPM to provide documentation of OPM encouraging agencies, through guidance and/or technical assistance, to assess their reporting systems and to develop policies and procedures to help ensure accurate reporting of training data.</p>

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
11/6/2013	GAO-14-65	1	Review of Agencies' Implementation of OMB's PortfolioStat Process	To improve the agency's implementation of PortfolioStat, the Director of the Office of Personnel Management should direct the CIO to report on the agency's progress in consolidating the help desk consolidation and IT asset inventory to shared services as part of the OMB integrated data collection quarterly reporting until completed.	Fully meeting the software application inventory practice to regularly update the inventory with quality controls to ensure reliability is dependent upon completion of in-progress technology and process changes within OPM. Recent OPM technology changes require that OPM's software registry (SWR) use new end-point management applications, Microsoft Defender for Endpoint (MDE) and Intune, for automated software application discovery. Intune is being deployed currently with full implementation expected by April 2024. Considering the automated software inventory data to be available, the SWR Team will be working with software lifecycle management process owners to incorporate use of the SWR in their processes and to include specific inventory quality controls. Relevant process owners are identified in OPM's previously provided Software Asset Management Policy.
5/22/2014	GAO-14-413	6	Government-wide Policies and Practices for Managing Software Licenses	Provide software license management training to appropriate agency personnel addressing contract terms and conditions, negotiations, laws and regulations, acquisition, security planning, and configuration management.	Corrective actions are in progress. There are technology process changes occurring which are delaying completion. Once these are completed OPM can finalize the training processes and documentation.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
9/2/2014	GAO-14-677	1	Federal Employee Classification System	Director of OPM, working through the Chief Human Capital Officer Council, and in conjunction with key stakeholders such as the Office of Management and Budget, unions, and others, should use prior studies and lessons learned from demonstration projects and alternative systems to examine ways to make the GS system's design and implementation more consistent with the attributes of a modern, effective classification system. To the extent warranted, develop a legislative proposal for congressional consideration.	In February 2023, OPM reported that it continues to provide Federal agencies with technical assistance on classification, as well as updating and establishing classification policy. Additionally, OPM reported on the development of a new classification policy for artificial intelligence work. To fully implement the recommendation, OPM still needs to work through the CHCO Council and in conjunction with key stakeholders, such as OMB and unions, to complete its review of studies and lessons learned; and, if warranted, develop a legislative proposal to make the GS system's design and implementation more consistent with the attributes of a modern, effective classification system. Doing so could help OPM better position itself to help ensure that the federal classification system is keeping pace with the government's evolving requirements.



Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
10/19/2014	GAO-15-79	1	Federal Paid Administrative Leave: Additional Guidance Needed to Improve OPM Data (GAO 15-79)	Develop guidance for agencies on which activities to enter, or not to enter, as paid administrative leave in agency time and attendance systems.	In July 2019, OPM officials told us that they have not finalized the remaining regulations due to legal and practical concerns related to employees serving overseas. For example, the proposed rules could conflict with overseas personnel observing local holidays for security, diplomatic, and practical reasons. OPM also announced that it is reconvening its interagency working group for dismissal and closure procedures to update its "DC Dismissal and Closure Procedures" guidance to reflect the new "weather and safety leave" procedures. In addition, in response to our recommendation, in May 2015, OPM issued a fact sheet on administrative leave, which discusses the appropriate use of an agency's administrative leave authority, including a definition of administrative leave as well as applicable government-wide, individual agency, and emergency policies on the use of administrative leave. However, this fact sheet will need to be revised to reflect the newly issued regulations for "weather and safety leave" in addition to the regulations for the other categories of paid leave when they are in effect. Once all regulations are finalized, the proposed rules, along with updated fact sheet guidance, should help agencies and federal employees appropriately use, record, and report administrative leave. As of January 2024, OPM had not issued final regulations. OPM's Unified Agenda includes an April 2024 publication target.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
10/19/2014	GAO-15-79	2	Federal Paid Administrative Leave: Additional Guidance Needed to Improve OPM Data (GAO 15-79)	Provide updated and specific guidance to payroll service providers on which activities to report, or not to report, to the paid administrative leave data element in EHRI.	In July 2017, OPM proposed new rules to regulate paid administrative leave, but has not finalized all these rules. In April 2018, OPM issued final regulations for "weather and safety leave" and announced that it would issue separate final regulations for "administrative leave," "investigative leave," and "notice leave" at a later date. To accompany the final regulations for "weather and safety leave," OPM issued two new data standards for agencies to report Paid Holiday Time Off and Weather and Safety Leave Hours Used that became effective in May 2018. Also, in November 2018, OPM released an update to its "DC Dismissal and Closure Procedures" guidance to reflect the new "weather and safety leave" procedures. Once all regulations are finalized, the proposed rules, along with updated guidance to payroll providers for reporting paid administrative leave and the new leave categories, should help agencies report comparable and reliable data to EHRI. As of January 2024, OPM had not issued final regulations. OPM's Unified Agenda includes an April 2024 publication target.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
9/1/2016	GAO-16-521	2	Federal Hiring: OPM Needs to Improve Management and Oversight of Hiring Authorities	To help strengthen the government's ability to compete in the labor market for top talent, and to improve the federal hiring process, the Director of OPM, in conjunction with the CHCO Council, should use this information to determine whether opportunities exist to refine, consolidate, eliminate, or expand agency-specific authorities to other agencies and implement changes where OPM is authorized, including seeking presidential authorization (as necessary) in order to do so. In cases where legislation would be necessary to implement changes, OPM should work with the CHCO Council to develop legislative proposals.	OPM agreed with this recommendation. In February 2023, OPM reported that, since 2021, it has been working to identify opportunities to consolidate and streamline Federal Hiring regulations. Additionally, OPM reported that it has authorized a variety of hiring flexibilities to assist agencies to address hiring surges resulting from the Infrastructure Investment and Jobs Act, the American Rescue Plan Act, the Inflation Reduction Act, and the Creating Helpful Incentives to Produce Semiconductors (CHIPS) and Science Act, among others. To fully implement this recommendation, OPM needs to prioritize and follow through on its planned actions to streamline hiring authorities and, as appropriate, develop legislative proposals in consultation with the CHCO Council. By doing so, OPM could improve the federal hiring process and strengthen the government's ability to compete in the labor market for top talent.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
9/29/2016	GAO-16-511	1	Federal Agencies' Use of Application Rationalization	To improve federal agencies' efforts to rationalize their portfolio of applications, the heads of the Departments of Agriculture, Commerce, Education, Energy, Health and Human Services, Housing and Urban Development, the Interior, Labor, State, Transportation, the Treasury, and Veterans Affairs; and heads of the Environmental Protection Agency; National Aeronautics and Space Administration; National Science Foundation; Nuclear Regulatory Commission; Office of Personnel Management; Small Business Administration; Social Security Administration; and U.S. Agency for International Development should direct their Chief Information Officers (CIOs) and other responsible officials to improve their inventories by taking steps to fully address the practices we identified as being partially met or not met.	Fully meeting the software application inventory practice to regularly update the inventory with quality controls to ensure reliability is dependent upon completion of in-progress technology and process changes within OPM. Recent OPM technology changes require that OPM's software registry (SWR) use new end-point management applications, Microsoft Defender for Endpoint (MDE) and Intune, for automated software application discovery. Intune is being deployed currently with full implementation expected by April 2024. Considering the automated software inventory data to be available, the SWR Team will be working with software lifecycle management process owners to incorporate use of the SWR in their processes and to include specific inventory quality controls. Relevant process owners are identified in OPM's previously provided Software Asset Management Policy.
10/7/2016	GAO-17-127	1	Reliability of the Enterprise Human Resources Integration System's Payroll Data	To support its strategic and open data goals, the Director of OPM should improve the availability of the EHRI payroll data--for example, by preparing the data for analytics, making them available through online tools such as FedScope, and including them among the EHRI data sources on the OPM website and Data.gov.	Priority Rec. In December 2023 OPM finalized a two-year improvement plan for EHRI payroll data with a target end date of Fiscal Year 2025.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
10/7/2016	GAO-17-127	4	Reliability of the Enterprise Human Resources Integration System's Payroll Data	To integrate the payroll data into the larger suite of EHRI databases, the Director of OPM should develop a schedule for executing these plans.	Priority Rec. As of March 2023, OPM has not functionally integrated payroll with other EHRI databases and has not developed a schedule for implementing plans to do so.
10/7/2016	GAO-17-127	5	Reliability of the Enterprise Human Resources Integration System's Payroll Data	To integrate the payroll data into the larger suite of EHRI databases, the Director of OPM should evaluate existing internal control activities and develop new control activities for EHRI payroll data, such as implementing transactional edit checks that leverage the information in the other EHRI datasets.	Priority Rec. OPM has not updated control activities for payroll data to include transactional edit checks that draw from other EHRI databases. However, OPM has begun to implement new control activities, including nearly 250 new validation edits for EHRI payroll data and provided supporting documentation for the new validation edits. OPM has also edit development to be part of their overall improvement plan.
3/20/2017	GAO-17-247	2	FEDERAL TELEWORK: Additional Controls Could Strengthen Telework Program Compliance and Data Reporting	Strengthen controls for reviewing, validating, and reporting telework data in annual Status of Telework in the Federal Government reports. Specifically, OPM should follow up with agency officials on data outliers, including significant changes in year-to-year data.	In December 2020 and again in September 2021, OPM officials told GAO the agency continues to not concur with the recommendation, saying its processes provide agencies with opportunities to correct their own data. GAO agrees that OPM should not independently validate agency data, but OPM should take the steps necessary to identify and explain data outliers and limitations that agencies otherwise do not identify. Because OPM is the agency responsible for reporting telework data, OPM should ensure its annual reports to Congress include a clear discussion of data reliability limitations. Following up on data outliers and large year-to-year changes can help OPM identify data errors that could be corrected by agencies and provide OPM with the opportunity to discuss data limitations with agencies. Including such information clearly in the annual telework reports to Congress can make them more useful to Congress and to others.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
9/6/2017	GAO-17-448	1	Review of Data Center Optimization Progress	The Secretaries of Agriculture, Commerce, Defense, Homeland Security, Energy, HHS, Interior, Labor, State, Transportation, Treasury, and VA; the Attorney General of the United States; the Administrators of EPA, GSA, and SBA; the Director of OPM; and the Chairman of NRC should take action to, within existing OMB reporting mechanisms, complete plans describing how the agency will achieve OMB's requirement to implement automated monitoring tools at all agency-owned data centers by the end of fiscal year 2018.	OPM has two agency-owned data centers. One was on target to implement monitoring solutions, with a target completion date of CY 2022. We were 75% complete with doing the implementation of the product to provide the monitoring. In 2022, the company that owned the solution that was being implemented deprecated the support for the product and as such that project was not able to be completed. There are currently point solutions in place, but the integrated product is no longer in existence because the support was deprecated. Therefore, the implementation team began looking for a replacement product when OPM determined that all the systems located in that data center would be migrated to the cloud and no additional investment in on-prem capability was to occur. This location is now targeted for closure in late 2026/early 2027. The second data center closure that was to occur in 2023 has been delayed. However, this data center will be closed, and no additional investment and monitoring tools will occur.
9/25/2017	GAO-17-675	1	Offices of Small and Disadvantaged Business Utilization (OSDBU) Reforms	To address demonstrated noncompliance with section 15(k) of the Small Business Act, as amended, the Director of the Office of Personnel Management should comply with sections 15(k)(2), (k)(8), and (k)(17) or report to Congress on why the agency has not complied, including seeking any statutory flexibilities or exceptions believed appropriate.	In September 2023, OPM posted the SES Vacancy announcement for the Director of the Office of Small and Disadvantaged Business Utilization on USAJOBS. The announcement closed on 9/21/2023. This addresses the 1st part of the recommendation. OPM has identified and is considering several possible solutions to address the 2nd part of the recommendation, but a final decision has not been made at this time. Supporting documents for the 3rd part of the recommendation was sent on 5/24/2022.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
11/7/2017	GAO-18-148	1	Agencies' Efforts in Implementing Provisions of FITARA Related to Incremental Development	The Director of OPM should ensure that the CIO of OPM updates the agency's policy and process for the CIO's certification of major IT investments' adequate use of incremental development, in accordance with OMB's guidance on the implementation of FITARA, and confirm that it includes a description of the CIO's role in the certification process and a description of how CIO certification will be documented.	OPM decided to not move forward with the separate incremental development policy and is including incremental development in our IT Portfolio Management policy which we expect to be finalized by Q4 FY24. In addition, OPM is drafting an IT Portfolio Management Guide which will provide more detailed information regarding processes and is expected by Q1 FY25.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
12/14/2017	GAO-18-91	2	Federal Special Pay Authorities	The Director of OPM, together with the CHCO Council, should provide guidance on assessing effectiveness and tools—such as best practices or frequently asked questions—for the range of Title 5 special payment authorities.	After GAO's report was issued in December 2017, OPM also posted new templates on its website to help agencies provide required information and facilitate the request and approval process for waivers of the normal payment limitations on recruitment, relocation, and retention incentives. GAO asked OPM to provide examples of related guidance or tools it provides to agencies to help them assess the effectiveness of the special pay authorities. We requested additional documentation in September 2019 and further coordinated with OPM in June 2020. In April 2021, GAO clarified the additional information needed and contacted OPM for an update. In May 2021, OPM provided documentation, but it did not clearly address efforts to work with the CHCO Council to provide guidance on assessing effectiveness. GAO requested an update from OPM in September 2021 and again in October 2022. As of November 2022, OPM informed GAO that it is still developing guidance on assessing effectiveness. GAO asked OPM for status updates in December 2022 and June 2023--including a request for a timeline and plan for implementing the recommendation--and will update the status when we complete review of any additional documents OPM provides. OPM will continue to develop guidance for agencies on assessing the effectiveness of special pay authorities (e.g., special rates, 3Rs, and other pay flexibilities) in addressing their recruitment and retention difficulties.



12/14/2017	GAO-18-91	3	Federal Special Pay Authorities	The Director of OPM should establish documented procedures to assess special payment authority requests requiring OPM approval and periodically review approval procedures to consider ways to streamline them.	<p>In January 2023, OPM provided updated procedure documents which demonstrated progress in implementing the recommendation, as they included questions to ask and steps to assess the sufficiency of information agencies submit with the requests. For example, the procedures for special pay rate requests included a question to guide an assessment of how various measures of pay rates for comparable jobs in non-federal salary data compare to the proposed special rate. Furthermore, the guidance on assessing agency requests to waive the normal payment limitations on recruitment and relocation incentives provided guidance to assess the success of recent efforts to recruit candidates using indicators such as offer acceptance rates, proportion of positions filled, and the length of time required to fill similar positions. The procedure documents also demonstrated progress in implementing the recommendation by referring to OPM plans, beginning in January 2024, to conduct annual reviews of the procedures to identify possible improvements, including consideration of ways to streamline the procedures. However, the format of the documents and lack of specifics on the annual reviews made the procedures appear to be in a draft or interim status. In June 2023, we requested that OPM provide documentation that the procedures are working management directives that have been appropriately internally communicated, including consideration of the audience, nature and purpose of the information, and accessibility of the information when needed to guide decision-making for assessments of agency special payment authority requests, as well as responsibilities and controls in place to prompt and conduct annual reviews of the procedures to potentially streamline them.</p> <p>As of January 2024, in response to OMB's response that the notification, documentation, and training to PLW that has been completed to date is insufficient to close this recommendation, the PLW Deputy</p>
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Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
					Associate Director will notify staff via memorandum of the Standard Operating Procedures (guidelines, controls, processing considerations) that must be followed in assessing special pay requests and that they will be included in PLW work plans and reviewed and reissued annually.
5/31/2018	GAO-18-377	1	Improper Payments: Actions and Guidance Could Help Address Issues and Inconsistencies in Estimation Processes	The Director of OPM should assess the processes to estimate Retirement improper payments to determine whether they effectively address key risks of improper payments - including eligibility and whether older claims face different risks of improper payments than new claims - and take steps to update the processes to incorporate key risks that are not currently addressed.	On January 30, 2024, OPM met with the GAO representatives regarding feedback and clarification on previous submitted documentation. OPM is currently working to address the feedback and will provide additional documentation for closure.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
8/2/2018	GAO-18-93	1	Federal Chief Information Officer Authorities	The Director of the Office of Personnel Management should ensure that the agency's IT management policies address the role of the CIO for key responsibilities in the five areas we identified. (Recommendation 24)	OPM submitted a request for closure on January 19, 2024, and is awaiting GAO's response.
8/15/2018	GAO-18-48	3	Federal Employee Misconduct: Actions Needed to Ensure Agencies Have Tools to Effectively Address Misconduct	The Director of OPM, after consultation with the CHCO Council, should provide guidance to agencies to enhance the training received by managers/supervisors and human capital staff to ensure that they have the guidance and technical assistance they need to effectively address misconduct and maximize the productivity of their workforces.	As of January 2024, OPM is close to finishing working with the developer on an updated online training course which can be made available for agencies to use for supervisory training on misconduct matters. Once completed, OPM will need to determine where this course can be hosted and identify funding to cover ongoing costs for making this course available online. Vacancies in the responsible program office and a focus on other government-wide priorities have impacted the progress OPM has made. However, this team is beginning to work on a plan to develop updated agency guidance on training supervisors and human resources staff on addressing federal employee misconduct and make this information available to supervisors and human capital practitioners. Doing so will enhance the guidance and technical assistance needed to effectively address misconduct and maximize the productivity of the workforce. Finally, OPM developed and released guidance to agencies on Maximizing Effective Use of Probationary Periods on December 13, 2023. Making effective use of probationary periods is a critical element of supervisors effectively addressing misconduct and maximizing the productivity of their workforces. <a href="http://www.chcoc.gov/content/maximizing-effective-use-of-probationary-periods">www.chcoc.gov/content/maximizing-effective-use-of-probationary-periods</a>

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
11/20/2018	GAO-19-35	2	Non-SES Agency Performance Management Systems	The Director of OPM, in consultation with the CHCO Council, should develop and implement a mechanism for agencies to routinely and independently share promising practices and lessons learned, such as through allowing agencies to post such information on OPM's Performance Management portal. (Recommendation 2)	In September 2023, OPM reported that the Max.gov repository will be sunseting, and that they are working to identify and implement a new platform to host relevant information. OPM stated that in the interim, they will re-engage agency partners to obtain new and updated promising practices and lessons learned. To fully address this recommendation, OPM needs to continue identifying and implementing mechanisms that encourage agencies to share lessons learned. As of January 2024, there has been no status change.
11/20/2018	GAO-19-35	3	Non-SES Agency Performance Management Systems	The Director of OPM, in consultation with the CHCO Council, should develop a strategic approach for identifying and sharing emerging research and innovations in performance management. (Recommendation 3)	In September 2023, OPM reported that they intend to make progress on this recommendation, but changing priorities combined with resource bandwidth, team member research experience, as well as budgetary constraints to support the need for fee-based research presents a challenge. To fully address this recommendation, OPM needs to finalize and issue its strategy to share emerging research and innovations in performance management. As of January 2024, there has been no status change.
6/14/2019	GAO-19-217	1	Federal Retirement: OPM Actions Needed to Improve Application Processing Times	The Associate Director of OPM's Retirement Services, working in coordination with the Chief Information Officer, should develop, document, and implement a Retirement Services IT modernization plan for initial project phases that is consistent with key aspects of IT project management, such as determining objectives, costs, and time frames for each initial phase.	RS and CIO have developed an RS IT road map that sets a plan to automate. It includes estimated costs and estimated timeframes. Work has begun on three key initiatives, but consistent progress will require sustained funding.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
6/14/2019	GAO-19-217	2	Federal Retirement: OPM Actions Needed to Improve Application Processing Times	The Associate Director of OPM's Retirement Services should adopt management practices to enhance the use of performance information on processing timeliness to inform how OPM manages operations, identifies problem areas, and allocates resources. For example, OPM could enhance use of performance measures at the operational level or establish a timeliness performance goal for reviewing disability retirement eligibility.	Retirement Services has provided the developed disability operational reports and is responding to GAO questions on how they are used.
6/14/2019	GAO-19-217	4	Federal Retirement: OPM Actions Needed to Improve Application Processing Times	The Associate Director of OPM's Retirement Services should develop and implement policies and procedures for assessing strategies intended to improve processing times, including collecting and improving data needed to support those strategies, such as collecting better productivity data or staffing data and linking them to processing outcomes.	RS provided GAO the developed production review summary report which consolidates the RS Operations Inventory and Production reports into one report. The report is used to assist management in making operational decisions. Trend analysis of the current fiscal year's inventory and production is a vital component of this report to assist management. This report is a primary resource to identify and mitigate potential issues.
6/14/2019	GAO-19-217	5	Federal Retirement: OPM Actions Needed to Improve Application Processing Times	The Associate Director of OPM's Retirement Services should examine its process for assessing its assistance to agencies on retirement applications. For example, OPM could incorporate into its assessment process more agency feedback or documentation of assessment results, which could improve its partnership with agencies to strengthen the assistance provided.	RS continues to train and assist agencies to strengthen the application process. We intend to gather vital feedback through the Benefit Officer Survey.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
6/14/2019	GAO-19-217	6	Federal Retirement: OPM Actions Needed to Improve Application Processing Times	The Associate Director of OPM's Retirement Services should work with agencies to determine if there are cost-effective ways to make the retirement application error report that it sends to agencies more user-friendly. For example, explore whether there are cost-effective ways to provide the error report in a format that could be manipulated (e.g., Excel spreadsheet), or to include additional information, such as incorporating disability retirement applications or providing clearer descriptions of errors or trend data, some of which OPM already collects.	Retirement Services has recently forged a working group, established a framework of proposed changes to the agency audit report. Meetings with HR and Payroll partners are being scheduled to discuss the proposed changes.
7/25/2019	GAO-19-384	2	Cybersecurity Risk Management	The Director of OPM should establish a process for conducting an organization-wide cybersecurity risk assessment. (Recommendation 54)	The Organizational Risk Assessment Plan (ORA) that addresses cybersecurity has been drafted. OPM is reviewing the Risk Management Framework (RMF) processes for existing risk assessment procedures and will update the draft Organizational Risk Assessment Plan accordingly. Once completed, OPM will finalize the ORA plan through the appropriate review processes and provide GAO with the documentation when completed.
7/25/2019	GAO-19-384	1	Cybersecurity Risk Management	The Director of the Office of Personnel Management (OPM) should update the agency's policies to require (1) an organization-wide cybersecurity risk assessment and (2) the use of risk assessments to inform control tailoring. (Recommendation 53)	OPM is in process of finalizing the cybersecurity policies to remediate this recommendation and will provide GAO with the documentation when completed.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
10/30/2019	GAO-20-129	15	Information Technology: Agencies Need to Fully Implement Key Workforce Planning Activities	The Director of the Office of Personnel Management should ensure that the agency fully implements each of the eight key IT workforce planning activities it did not fully implement.  GAO Comments: When we confirm what actions the agency has taken in response to this recommendation, we will provide updated information.	OPM is continuing progress to address GAO's recommendation. OPM has a corrective action plan (CAP) in place and expects remediation to be completed by end of Q4 FY24.
3/30/2020	GAO-20-59	3	Electronic Records Management	The Director of the Office of Personnel Management should establish a time frame to develop a plan to manage permanent electronic records. (Recommendation 32 in the report)	Priority Rec. OPM began taking steps to manage all of its permanent records in an electronic format. Specifically, OPM was in process of procuring a contract that will, among other things, help OPM maintain all permanent records electronically by December 2022.
3/30/2020	GAO-20-59	2	Electronic Records Management	The Director of the Office of Personnel Management should establish a time frame to develop an inventory of electronic information systems used to store agency records that includes all of the required elements. (Recommendation 31 in the report)	Implementation of this recommendation is expected by the end of FY 2024
3/30/2020	GAO-20-59	4	Electronic Records Management	The Director of the Office of Personnel Management should establish a time frame to update its policies and procedures to include all of the required electronic information system functionalities for recordkeeping systems. (Recommendation 33 in the report)	Implementation of this recommendation is expected by the end of FY 2024

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
3/30/2020	GAO-20-59	5	Electronic Records Management	The Director of the Office of Personnel Management should establish a time frame to update the agency's policies and procedures on retention and management for email to include retaining electronic calendars and draft documents. (Recommendation 34 in the report)	Implementation of this recommendation is expected by the end of FY 2024
9/16/2020	GAO-20-559	1	SES Reassignments	The Acting Director of the Office of Personnel Management should use OPM's oversight authority to monitor career SES reassignments to ensure that federal agencies meet requirements contained in statute or regulation, and follow OPM's related guidance. In situations where OPM finds that an agency has taken a career SES reassignment action contrary to these requirements, it should use its authority to require the agency to take corrective action, as appropriate.	In June 2023, OPM reiterated that it did not concur with the recommendation for these same reasons. However, as discussed in the report, GAO maintains that OPM should use its oversight authority to ensure agencies' reassignments of SES staff are consistent with requirements. As of January 2024, there has been no status change.
10/25/2021	GAO-22-104297	1	Federal Hiring: OPM Should Collect and Share COVID-19 Lessons Learned to Inform Hiring During Future Emergencies	The Director of OPM, in conjunction with the Chief Human Capital Officers Council, should develop and implement a process for collecting and sharing comprehensive government-wide information on the lessons learned associated with agencies' use of different hiring authorities in response to the COVID-19 pandemic.	OPM had administered surveys and completed its data review in an effort to collect and share government-wide information on the lessons learned associated with agencies' use of different hiring authorities in response to the COVID-19 pandemic. OPM had drafted a report of its survey and data findings that is currently going through OPM's internal clearance process.



Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
1/27/2022	GAO-22-104414	2	Intergovernmental Personnel Act (IPA) mobility program	The Director of OPM should establish a process and update its guidance to obtain complete and accurate data about the number of non-federal mobility program participants on detail to federal agencies.	OPM disagreed with this recommendation, in part because they said it would create a reporting burden for agencies. However, this data could be used to determine where there are opportunities for agencies to more fully leverage the mobility program to address critical skills and occupation gaps, which has been a government-wide high-risk area since 2001. Therefore, GAO continues to believe that establishing a process and updating its guidance to collect these data are essential for informing the customer service and assistance OPM provides to federal agencies and encourage OPM to explore reasonable steps to do so. As of January 2024, there has been no status change.
2/23/2022	GAO-22-104206	1	Office of Personnel Management Federal Financial System Modernization	The Director of OPM should direct the CFO to ensure that the FFS-R project conducts a comprehensive M3 risk assessment and defines and meets exit criteria for the Migration phase Release 1 and Release 2 tollgates before proceeding to the next phase of the modernization.	OPM provided GAO a response and related documentation to address the recommendation, in June 2023.
2/23/2022	GAO-22-104206	2	Office of Personnel Management Federal Financial System Modernization	The Director of OPM should direct the CFO to ensure that the TFM program develops cost estimates using best practices described in GAO's Cost Estimating and Assessment Guide.	In June 2023, OPM provided GAO documentation to address the recommendation. GAO provided follow-up questions to which OPM will provide responses and related documentation for closure.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
2/23/2022	GAO-22-104206	3	Office of Personnel Management Federal Financial System Modernization	The Director of OPM should direct the CFO to ensure that the TFM program updates the TFM schedule using best practices described in GAO's Schedule Assessment Guide, in particular, by addressing those schedule characteristics that were not substantially or fully met.	OPM provided GAO a response and related documentation to address the recommendation, in June 2023.
2/23/2022	GAO-22-104206	4	Office of Personnel Management Federal Financial System Modernization	The Director of OPM should direct the CFO to ensure that interagency agreements, including service level agreements, identify how security requirements will be conducted and the level of services, including cybersecurity, that will be provided.	OPM provided GAO a response and related documentation to address the recommendation, in June 2023.
2/23/2022	GAO-22-104206	5	Office of Personnel Management Federal Financial System Modernization	The Director of OPM should direct the CFO to ensure that the OCIO and TFM Program Management Office have identified and acquired sufficient systems and cybersecurity experts to adequately staff the TFM program, including the FFS-R project.	OPM provided GAO a response and related documentation to address the recommendation, in June 2023.
9/22/2022	GAO-22-105065	1	Federal Agency Privacy Programs	The Director of OPM should establish a time frame for updating the agency's policy for creating, reviewing, and publishing system of records notices, and make these updates. (Recommendation 52)	We plan to review the current SORN process and policy documentation by the end of Q2 of FY 24, as our operational priorities and resources permit.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
9/22/2022	GAO-22-105065	2	Federal Agency Privacy Programs	The Director of OPM should define and document procedures for coordination between privacy and information security functions. (Recommendation 53)	<p>Since our previous response, OPM has continued to hold a weekly executive meeting with the Senior Agency Official for Privacy (SAOP) and the Chief Information Security Officer (CISO) and their respective deputies to ensure coordination on projects and issues of mutual interest. Additionally, in FY 24 OPM continues to work on implementing the privacy and security controls in NIST 800-53 rev. 5, and any policies and procedures related to that implementation will reflect the necessary coordination.</p> <p>A draft agency-level Cybersecurity and Privacy policy is currently proceeding through OPM's internal review and clearance process, which is planned to clear in FY 24.</p>
9/22/2022	GAO-22-105065	3	Federal Agency Privacy Programs	The Director of OPM should fully define and document a policy and process for ensuring that the senior agency official for privacy or other designated privacy official is involved in assessing and addressing the hiring, training, and professional development needs of the agency with respect to privacy. (Recommendation 54)	<p>OESPIM's Executive Director, who serves as OPM's SAOP, as the head of OPM's privacy program and in accordance with OMB Circular A-130, has and exercises the authority to recruit and fill Privacy positions, subject to staffing and budgetary guardrails.</p> <p>During FY 24, OESPIM is planning to hire for a supervisory GS-15 Privacy specialist position, a GS-14 Privacy specialist position, and a GS-11 Privacy employee position. Additional positions may be posted and filled in FY 24 and FY 25 subject to staffing and funding requirements.</p> <p>As noted in our previous response, OESPIM will consider formally documenting the SAOP's role in hiring, training, and professional development by the end of FY 24 as priorities and resources allow.</p>

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
9/22/2022	GAO-22-105065	4	Federal Agency Privacy Programs	The Director of OPM should incorporate privacy into an organization-wide risk management strategy that includes a determination of risk tolerance. (Recommendation 55)	In FY 24 and FY 25 we plan to continue examining our approach to privacy risk management and will look to expand activities consistent with this recommendation, including continuing to work on implementing the privacy and security controls in NIST 800-53 rev. 5.
9/22/2022	GAO-22-105065	5	Federal Agency Privacy Programs	The Director of OPM should establish a time frame for fully defining the role of the senior agency official for privacy or other designated privacy official in reviewing and approving system categorizations, overseeing privacy control assessments, and reviewing authorization packages, and document these roles. (Recommendation 56)	In FY 24 and FY 25, we will continue to look for opportunities to document the role of the SAOP more fully in these activities; this should be satisfied by the draft agency-level Cybersecurity and Privacy policy that is currently proceeding through OPM's internal review and clearance process, which is planned to clear in FY 24. In addition, we are currently assessing the ATO process and FIPS 199 reviews.
9/22/2022	GAO-22-105065	6	Federal Agency Privacy Programs	The Director of OPM should fully develop and document a privacy continuous monitoring strategy. (Recommendation 57)	As the privacy and security programs work collaboratively to implement the NIST 800-53, rev. 5, we plan to further evaluate our approach to continuous monitoring and documentation by Q4 of FY 24 or Q1 of FY 25.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
9/29/2022	GAO-22-105187	1	CyberCorps® Scholarship for Service (SFS) Program	The Director of the Office of Personnel Management, in coordination with the Director of the National Science Foundation, should establish a time frame for implementing a process to ensure that all CyberCorps® Scholarship for Service Program scholarship recipients provide their institutions of higher education and the Office of Personnel Management (in coordination with the National Science Foundation) with annual verifiable documentation of post-award employment and up-to-date contact information for a period of at least through the end of their work service obligation.	In September 2023, OPM provided documents to address the recommendation. As of January 2024, GAO is still reviewing the documents.
9/29/2022	GAO-22-105187	2	CyberCorps® Scholarship for Service (SFS) Program	The Director of the Office of Personnel Management, in coordination with the Director of the National Science Foundation, should ensure the collection of complete and consistent data that relate to the fulfillment of all post-award obligations or requirements pursuant to the CyberCorps® Scholarship for Service Program.	In September 2023, OPM provided documents to address the recommendation. As of January 2024, GAO is still reviewing the documents.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
12/20/2022	GAO-23-105562	1	CASES Act Implementation	The Director of the Office of Personnel Management should establish a reasonable time frame for when the agency will be able to accept remote identity proofing with authentication, digitally accept access and consent forms from individuals who were properly identity proofed and authenticated, and post access and consent forms on the agency's privacy program website. (Recommendation 11)	OPM plans to use a platform that relies on the General Services Administration's (GSA) Login.gov for remote identity proofing and authentication to digitally accept access and consent forms. OPM's timeline is dependent on Login.gov's ability to provide the requisite identity assurance level necessary for Privacy Act requests. In the meantime, OPM will proceed to develop and obtain clearance of its access and consent forms and anticipates posting them at opm.gov/privacy by the end of second quarter of FY 2024.
1/9/2023	GAO-23-105222	1	Eligibility Verification in the Federal Employee Health Benefit Program (FEHB)	The Director of OPM should implement a monitoring mechanism to ensure employing offices and carriers are verifying family member eligibility as required by OPM's 2021 guidance.	We released Benefits Administration Letter (BAL) on August 21, 2023, requiring agencies/retirement systems to provide annual notification to employees/annuitants about which family members they may cover under their FEHB enrollments. This is designed to educate enrollees and discourage the addition of ineligible family members to their coverage. It also encourages them to verify that all current family members are eligible. Agencies must perform this notification by October 31 each year, and must provide OPM with evidence that the task has been done.
1/9/2023	GAO-23-105222	2	Eligibility Verification in the Federal Employee Health Benefit Program (FEHB)	The Director of OPM should implement a monitoring mechanism to identify and remove ineligible family members from the FEHB program.	We are currently drafting a Benefits Administration Letter (BAL) that will require agencies and retirement systems to verify a random sample (percentage of Self Plus One and Self & Family elections) each Open Season in the effort to identify ineligible family members and prohibit their enrollment. This process was introduced in a previous BAL, but has never before been required for Open Season elections. We hope to release this BAL in late June 2024.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
1/9/2023	GAO-23-105222	3	Eligibility Verification in the Federal Employee Health Benefit Program (FEHB)	The Director of OPM should assess the likelihood and impact of the fraud risk related to ineligible FEHB members.	OPM has assessed the likelihood and impact of the fraud risk related to ineligible FEHB members and documented this in the fraud risk profile. With the controls in place, it is low risk. The risk profile is going through internal review and approval.
1/9/2023	GAO-23-105222	4	Eligibility Verification in the Federal Employee Health Benefit Program (FEHB)	The Director of OPM should document its assessment of the fraud risk related to ineligible members in its fraud risk profile for the FEHB program.	OPM has assessed the likelihood and impact of the fraud risk related to ineligible FEHB members and documented this in the fraud risk profile. With the controls in place, it is low risk. The risk profile is going through internal review and approval.

Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
2/27/2023	GAO-23-105528	1	Skills Gaps in the Federal Workforce	The Director of OPM should establish an action plan to address OPM's skills gaps identified in the workforce assessment, either as an update to its HCOP or a separate effort.	OPM agreed with the recommendation. OPM's 2022 - 2026 Human Capital Operating Plan (HCOP) outlines the agency's action plan and milestones to address skills gaps, under Priority One: Build the Skills of the Workforce and Attract Skilled Talent. The agency has been strategic in its approach to address and close skills gaps through various talent management and workforce development efforts led by OPM's Workforce and Talent Strategies and Workforce Development Divisions. In an effort to address agency skill gaps, the Workforce and Talent Strategies Division is targeting early career talent through an internship program, which was first launched in May 2023; working closely with hiring officials to target candidates with the desired skills; and encouraging hiring officials to use the Agency Talent Portal to identify candidates with the skills needed to fill job vacancies. In May 2023, the agency's new Chief Learning Officer was onboarded to establish the Workforce Development Division and address skill and competency gaps through targeted talent development and training strategies. This division is developing and executing a plan and strategies to assess and address agency skill and competency gaps; integrating a third-party e-learning content library within OPM's learning management systems to provide employees with on-demand access to training that will support the closure of gaps; managing professional development programs to support employees and leaders; and automating career development processes and resources, such as the Individual Development Plan.



Final Report Date	Audit Number	Recommendation Number	Title	Recommendation Detail	Status
2/27/2023	GAO-23-105528	2	Skills Gaps in the Federal Workforce	The Director of OPM should document, select risk responses for, and monitor progress addressing the risks OPM's skills gaps pose to achieving its strategic objectives, either as part of the process for monitoring strategic plan implementation or through other risk management processes.	OPM agreed with the recommendation. OPM's 2022 – 2026 Agency Strategic Plan highlights its plan to identify and address workforce skill and competency gaps under Goal 2.1: Build the skills of the OPM workforce and attract skilled talent. OPM senior executives and goal owners meet bi-monthly to document, update risk responses, and monitor progress addressing the risks OPM's skills gaps pose to achieving its strategic objectives. OPM's milestones related to addressing skills gaps are currently in progress and on target.

## IG Open Recommendations Report

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
11/14/2008	4A-CF-00-08-025	Audit of the Office of Personnel Management's Fiscal Year 2008 Consolidated Financial Statements	1	The OCIO should continue to update and implement entity-wide security policies and procedures and provide more direction and oversight to Program Offices for completing certification and accreditation requirements. In addition, documentation on application access permissions should be enhanced and linked with functional duties and procedures for granting logical access need to be refined to ensure access is granted only to authorized individuals.	Actions to address the recommendation are in progress.
11/10/2010	4A-CF-00-10-015	Audit of the Office of Personnel Management's Fiscal Year 2010 Consolidated Financial Statements	2	KPMG recommends that the CIO identify common controls, control responsibilities, boundaries and interconnections for information systems in its system inventory.	Actions to address the recommendation are in progress.
9/14/2011	1K-RS-00-11-068	Stopping Improper Payments to Deceased Annuitants	1	Capitalizing on Retirement Systems Modernization Technology:  We recommend that OPM actively begin discussions with their contractor, Hewitt Associates, regarding the edit capabilities of their solution to flag records and produce management reports for anomalies or suspect activity. We also recommend that OPM and the RSM contractor finalize the development of processes for the death match and surveys and begin to put processes in place to perform these operations.	Closure documentation has been submitted for consideration.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
11/14/2011	4A-CF-00-11-050	Audit of the Office of Personnel Management's Fiscal Year 2011 Consolidated Financial Statements	1	KPMG recommends that the OPM Director in coordination with the CIO and system owners, including the Chief Financial Officer and system owners in Program offices, ensure that resources are prioritized and assigned to address the information system control environment weaknesses.	Actions to address the recommendation are in progress.
11/10/2014	4A-CF-00-14-039	Audit of the Office of Personnel Management's Fiscal Year 2014 Consolidated Financial Statements	1	KPMG recommends that the OPM Director in coordination with the CIO and system owners, including the Chief Financial Officer and system owners in Program offices, ensure that resources are prioritized and assigned to implement the current authoritative guidance regarding two-factor authentication.	Actions to address the recommendation are in progress.
11/10/2014	4A-CF-00-14-039	Audit of the Office of Personnel Management's Fiscal Year 2014 Consolidated Financial Statements	2	KPMG recommends that the OPM Director in coordination with the CIO and system owners, including the Chief Financial Officer and system owners in Program offices, ensure that resources are prioritized and assigned to document and map access rights in OPM systems to personnel roles and functions, following the principle of "least privilege."	Actions to address the recommendation are in progress.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
11/10/2014	4A-CF-00-14-039	Audit of the Office of Personnel Management's Fiscal Year 2014 Consolidated Financial Statements	3	<p>KPMG recommends that the OPM Director in coordination with the CIO and system owners, including the Chief Financial Officer and system owners in Program offices, ensure that resources are prioritized and assigned to enhance OPM's information security control monitoring program to detect information security control weakness by:</p> <ul style="list-style-type: none"> <li>• Implementing and monitoring procedures to ensure system access is appropriately granted to new users, consistent with the OPM access approval process.</li> <li>• Monitoring the process for the identification and removal of separated users to ensure that user access is removed timely upon separation; implementing procedures to ensure that user access, including user accounts and associated roles, are reviewed on a periodic basis consistent with the nature and risk of the system, and modifying any necessary accounts when identified.</li> </ul>	Actions to address the recommendation are in progress.
7/8/2016	4A-CA-00-15-041	Office of Personnel Management's Contract Management Operations	5	We recommend that OPO provide documentation to verify that the closeout process has been administered on the open obligations for the 46 contracts questioned.	In August 2023, OPM provided additional documentation to OIG. As of January 2024, OIG provided some feedback and requests for additional information. Corrective action is in progress.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
7/8/2016	4A-CA-00-15-041	Office of Personnel Management's Contract Management Operations	6	We recommend that OPO deobligate the \$108,880,417 in open obligations, for the 46 contracts questioned, if support cannot be provided to show that the contract should remain open, and the funds are still being utilized.	In August 2023, OPM provided additional documentation to OIG. As of January 2024, OIG provided some feedback and requests for additional information. Corrective action is in progress.
11/14/2016	4A-CF-00-16-030	Audit of the Office of Personnel Management's Fiscal Year 2016 Closing Package Financial Statements	11	Document access rights to systems to include roles, role descriptions, and privileges/activities associated with each role and role or activity assignments that may cause a segregation of duties conflict.	Actions to address the recommendation are in progress.
11/14/2016	4A-CF-00-16-030	Audit of the Office of Personnel Management's Fiscal Year 2016 Closing Package Financial Statements	14	Review audit logs on a pre-defined periodic basis for violations or suspicious activity and identify individuals responsible for follow up or elevation of issues to the Security Operations Team for review. The review of audit logs should be documented for record retention purposes.	Actions to address the recommendation are in progress.
11/14/2016	4A-CF-00-16-030	Audit of the Office of Personnel Management's Fiscal Year 2016 Closing Package Financial Statements	16	Establish a methodology to systematically track all configuration items that are migrated to production and be able to produce a complete and accurate listing of all configuration items for both internal and external audit purposes, which will in turn support closer monitoring and management of the configuration management process.	Actions to address the recommendation are in progress.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
11/14/2016	4A-CF-00-16-030	Audit of the Office of Personnel Management's Fiscal Year 2016 Closing Package Financial Statements	17	Enforce existing policy requiring mandatory security configuration settings, developed by OPM or developed by vendors or federal agencies, are implemented and settings are validated on a periodic basis to ensure appropriateness.	Actions to address the recommendation are in progress.
11/14/2016	4A-CF-00-16-030	Audit of the Office of Personnel Management's Fiscal Year 2016 Closing Package Financial Statements	2	Create and/or update system documentation as follows: 1. System Security Plans - Update the plans and perform periodic reviews in accordance with the organization defined frequencies. 2. Risk Assessments - Conduct a risk assessment for financially relevant applications and systems and document comprehensive results of the testing performed. 3. Authority to Operate - Perform security assessment and authorization reviews in a timely manner and create up-to-date authority to operate packages for systems. 4. Information System Continuous Monitoring - Document results of continuous monitoring testing performed for systems.	Actions to address the recommendation are in progress.
11/14/2016	4A-CF-00-16-030	Audit of the Office of Personnel Management's Fiscal Year 2016 Closing Package Financial Statements	5	Establish a means of documenting a list of users with significant information system responsibility to ensure the listing is complete and accurate and the appropriate training is completed.	Actions to address the recommendation are in progress.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
11/14/2016	4A-CF-00-16-030	Audit of the Office of Personnel Management's Fiscal Year 2016 Closing Package Financial Statements	8	Perform a comprehensive review of the appropriateness of personnel with access to systems at the Agency's defined frequencies.	Actions to address the recommendation are in progress.
6/20/2017	4A-CI-00-17-014	Audit of the U.S. Office of Personnel Management's Security Assessment and Authorization (SAA) Methodology	2	We recommend that the OCIO perform a thorough security controls assessment on the LAN/WAN. This assessment should address the deficiencies listed in the section above, and should be completed after a current and thorough SSP is in place (see Recommendation 1).	Corrective actions are in progress to address the recommendation.
9/29/2017	4A-CI-00-17-030	Audit of the Information Technology Security Controls of the U.S. Office of Personnel Management's SharePoint Implementation	3	We recommend that OPM require employees with administrative or managerial responsibilities over SharePoint to take specialized training related to the software.	Corrective actions are in progress to address the recommendation.
9/29/2017	4A-CI-00-17-030	Audit of the Information Technology Security Controls of the U.S. Office of Personnel Management's SharePoint Implementation	5	We recommend that OPM implement a formal process to routinely audit SharePoint user accounts for appropriateness. This audit should include verifying individuals are still active employees or contractors and their level of access is appropriate.	Corrective actions are in progress to address the recommendation.
9/29/2017	4A-CI-00-17-030	Audit of the Information Technology Security Controls of the U.S. Office of Personnel Management's SharePoint Implementation	6	We recommend that OPM document approved security configuration settings for its SharePoint application.	Corrective actions are in progress to address the recommendation.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
9/29/2017	4A-CI-00-17-030	Audit of the Information Technology Security Controls of the U.S. Office of Personnel Management's SharePoint Implementation	7	We recommend that OPM implement a process to routinely audit the configuration settings of SharePoint to ensure they are in compliance with the approved security configuration standards. Note – this recommendation cannot be implemented until the controls from Recommendation 6 are in place.	Corrective actions are in progress to address the recommendation.
9/29/2017	4A-CI-00-17-030	Audit of the Information Technology Security Controls of the U.S. Office of Personnel Management's SharePoint Implementation	8	We recommend that OPM implement a process to test patches on its SharePoint servers.  Once this process has been implemented, we recommend OPM implement controls to ensure all critical patches are installed on SharePoint servers and databases in a timely manner as defined by OPM policies.	Corrective actions are in progress to address the recommendation.
1/16/2018	4A-CF-00-15-049	U.S. Office of Personnel Management's Travel Card Program	1	We recommend that Travel Operations ensure that all travel card policies and procedures, governing OPM's travel card program, are accurate and consistent with one another and contain all areas/requirements outlined by laws and regulations pertaining to OPM's government travel card program.	The OPM travel charge card management plan (CCMP) has been updated to contain all areas/requirements outlined by laws and regulations pertaining to OPM's government travel card program.



Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
1/16/2018	4A-CF-00-15-049	U.S. Office of Personnel Management's Travel Card Program	10	We recommend that Travel Operations develop written procedures for their Compliance Review and Voucher Review processes. At a minimum, procedures should include verifying and validating travel authorizations, receipts, and vouchers.	The OPM travel charge card management plan (CCMP) has been updated to include procedures related to verifying and validating travel authorizations, receipts, and vouchers. Evidence and supporting documents were submitted for closure.
1/16/2018	4A-CF-00-15-049	U.S. Office of Personnel Management's Travel Card Program	11	We recommend that Travel Operations ensure organizational program coordinators review and certify monthly ATM Reports to help identify cardholder cash advances taken in excess of their ATM limit.	OCFO has revamped the process by which program offices review ATM reports. Guidance on this process is outlined in the OPM travel charge card management plan (CCMP).
1/16/2018	4A-CF-00-15-049	U.S. Office of Personnel Management's Travel Card Program	12	We recommend that Travel Operations follow up with organizational program coordinators to ensure that appropriate actions are taken against employees who have used their travel card for unauthorized transactions during each billing cycle.	Reinforcement of the organizational program coordinators' roles is contained within the OPM travel charge card management plan (CCMP).
1/16/2018	4A-CF-00-15-049	U.S. Office of Personnel Management's Travel Card Program	15	We recommend that Travel Operations ensure that an analysis is routinely performed to certify that travel cards are not used after the separation date.	The employee travel card account is closed upon notification of an employee separation. This process is outlined in the OPM travel charge card management (CCMP). Evidence and supporting documents will be submitted for closure.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
1/16/2018	4A-CF-00-15-049	U.S. Office of Personnel Management's Travel Card Program	18	We recommend that Travel Operations enforce policies and procedures to conduct periodic reviews of travel card accounts to ensure cards are needed by the employees to which they are issued.	Reviews of all travel card accounts are conducted monthly. This procedure is outlined in the OPM travel charge card management (CCMP) - Section 4.5. Evidence and supporting documents were submitted for closure.
1/16/2018	4A-CF-00-15-049	U.S. Office of Personnel Management's Travel Card Program	19	We recommend that Travel Operations establish and implement controls to properly document and retain support for the periodic reviews of inactivity.	Reviews of all travel card accounts are conducted monthly. This procedure is outlined in the OPM travel charge card management (CCMP) - Section 4.5. Evidence and supporting documents will be submitted for closure.
1/16/2018	4A-CF-00-15-049	U.S. Office of Personnel Management's Travel Card Program	6	We recommend that Travel Operations formally appoint approving officials and program coordinators through appointment letters, which outline their basic responsibilities and duties related to the travel card operations for their respective program office.	OCFO will issue appointment letters to approving officials and program coordinators, which outline their basic responsibilities and duties related to the travel card operations for their respective program offices. This process will be executed in FY24 - Q3 (April).

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
1/16/2018	4A-CF-00-15-049	U.S. Office of Personnel Management's Travel Card Program	7	We recommend that Travel Operations coordinate and partner with OPM program approving officials, program coordinators, and any appropriate program offices to implement controls to ensure card users and oversight personnel receive the required training on the appropriate use, controls and consequences of abuse before they are given a card, and/or appointment to the position. Documentation should be maintained to support the completion of initial and refresher training.	OCFO requires annual training of OPM program approving officials, program coordinators, and employees. This requirement is outlined in the OPM travel charge card management (CCMP) - Section 3. OCFO maintains documentation to support the completion of initial and refresher training. Evidence and supporting documents are being gathered for closure.
1/16/2018	4A-CF-00-15-049	U.S. Office of Personnel Management's Travel Card Program	8	We recommend that Travel Operations strengthen its oversight and monitoring of travel card transactions, to include but not be limited to, ensuring travel cards are being used and approved in accordance with regulations and guidance.	Reviews of all travel card accounts are conducted monthly. This procedure is outlined in the OPM travel charge card management (CCMP) - Section 4.5. Evidence and supporting documents will be submitted for closure.
1/16/2018	4A-CF-00-15-049	U.S. Office of Personnel Management's Travel Card Program	9	We recommend that Travel Operations provide frequent reminders to the approving officials on their responsibilities when reviewing travel authorizations and vouchers. Reminders should include such things as GSA's best practices for travel charge cards to ensure travel cardholders submit receipts for expenses over \$75 when submitting their vouchers, and that travel authorizations are approved prior to travel.	Reviews of all travel card accounts are conducted monthly. This procedure is outlined in the OPM travel charge card management (CCMP) - Section 4.5. OCFO also conducts quarterly travel management briefings with the approving officials. Evidence and supporting documents will be submitted for closure.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
2/5/2018	L-2018-1	Management Advisory OPM's Non-Public Decision to Re-Apportion Annuity Supplements	1	We recommend that OPM cease implementing the RIL 2016-12 and OS Clearinghouse 359 memoranda to apply the state court-ordered marital share to Annuity Supplements unless those court orders expressly and unequivocally identify the Annuity Supplement to be apportioned.	These recommendations are related to active litigation. OPM is following the advice and guidance of OGC on these cases.
2/5/2018	L-2018-1	Management Advisory OPM's Non-Public Decision to Re-Apportion Annuity Supplements	2	We recommend that OPM take all appropriate steps to make whole those retired LEOs and any other annuitants affected by this re-interpretation. This would include reversing any annuities that were decreased either prospectively or retroactively that involved a state court order that did not expressly address the Annuity Supplement.	These recommendations are related to active litigation. OPM is following the advice and guidance of OGC on these cases.
2/5/2018	L-2018-1	Management Advisory OPM's Non-Public Decision to Re-Apportion Annuity Supplements	3	We recommend that OPM determine whether it has a legal requirement to make its updated guidance, including Retirement and Insurance Letters, publicly available.	These recommendations are related to active litigation. OPM is following the advice and guidance of OGC on these cases.
3/29/2018	4A-CF-00-16-055	OPM's Common Services	1	We recommend that the OCFO implement a process to correct identified errors in the same fiscal year.	OPM has implemented this recommendation. As part of the final fiscal year billing, an error check process has been included in the process. Evidence and supporting documents will be submitted for closure.
3/29/2018	4A-CF-00-16-055	OPM's Common Services	5	We recommend that the OCFO reformat their budget levels to ensure all costs are appropriately itemized and/or contain full disclosure of all costs, to ensure transparency.	OPM does not concur with this recommendation. No further corrective actions planned.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
5/10/2018	4A-HR-00-18-013	Audit of the Information Technology Security Controls of USA Staffing - FY 2018	3	We recommend that OPM apply the approved security configuration settings for the USA Staffing System.	Corrective actions are in progress to address the recommendation.
5/10/2018	4A-HR-00-18-013	Audit of the Information Technology Security Controls of USA Staffing - FY 2018	4	We recommend that OPM apply system patches in a timely manner and in accordance with policy.	Corrective actions are in progress to address the recommendation.
11/15/2018	4A-CF-00-18-024	Office of Personnel Management's Fiscal Year 2018 Consolidated Financial Statements	1	We recommend that the Office of the Chief Information Officer (OCIO), in coordination with system owners, enforce and monitor the implementation of corrective actions to:  Security Management - Review and update system documentation (System Security Plans and Authority to Operate Packages) and appropriately document results of Risk Assessments and Information System Continuous Monitoring) in accordance with agency policies and procedures.	Actions to address the recommendation are in progress.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
11/15/2018	4A-CF-00-18-024	Office of Personnel Management's Fiscal Year 2018 Consolidated Financial Statements	23	We recommend that the Office of the Chief Information Officer (OCIO), in coordination with system owners, enforce and monitor the implementation of corrective actions to:  Interface / Data Transmission Controls - Develop interface / data transmission design documentation that specifies data fields being transmitted, controls to ensure the completeness and accuracy of data transmitted, and definition of responsibilities.	Actions to address the recommendation are in progress.
12/21/2018	4K-CI-00-18-009	Evaluation of OPM's Preservation of Electronic Records	3	We recommend that OCIO implement guidance on the official use of smartphones to include restrictions on usage and details on maintenance and preservation of records.	OPM is currently updating the IT Security policy published by the OCIO-Cybersecurity Division to reflect personal use of GFE.
3/5/2019	1C-LE-00-18-034	Audit of the Information Systems General Controls at Priority Health Plan	2	We recommend that Spectrum Health/Priority Health segregate its internal network in order to separate sensitive resources from user-controlled systems.	OPM deemed this recommendation Resolved on 8/30/2019. Corrective actions are planned and in progress but not yet fully complete.
4/25/2019	4A-CI-00-18-037	IT Audit of OPM's Compliance with FITARA U.S. OPM FY 2018	1	We recommend that the Office of the Director ensure that the CIO has adequate involvement and approval in all phases of annual and multi-year planning, programming, budgeting, and execution decisions in line with FITARA and OMB Circular A-130 requirements.	Corrective actions are in progress to address the recommendation.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
4/25/2019	4A-CI-00-18-037	IT Audit of OPM's Compliance with FITARA U.S. OPM FY 2018	4	We recommend that the OCIO update its procedures to only allow the CIO's direct reports to review and approve the IT checklists for non-major procurements as defined in FITARA and by OMB.	Corrective actions are in progress to address the recommendation.
10/23/2019	4A-CI-00-19-008	Audit of OPM'S Compliance with the Federal Information Technology Acquisition Reform Act - DCOI, GSS - FY 2019	2	Recommendation 2: We recommend that OPM perform a gap analysis to identify the monitoring, inventory, and management tools that it needs to implement automated infrastructure management as required by the DCOI and OMB.	Corrective actions are in progress to address the recommendation.
10/23/2019	4A-CI-00-19-008	Audit of OPM'S Compliance with the Federal Information Technology Acquisition Reform Act - DCOI, GSS - FY 2019	3	Recommendation 3: We recommend that OPM install automated power metering in all of its data centers in accordance with the requirements in the DCOI.	Corrective actions are in progress to address the recommendation.
10/23/2019	4A-CI-00-19-008	Audit of OPM'S Compliance with the Federal Information Technology Acquisition Reform Act - DCOI, GSS - FY 2019	4	Recommendation 4: We recommend that OPM assess the current state of its infrastructure to accurately report data center metrics, including the correct number of data centers (including non-tiered spaces), the correct operational status of data centers, and accurate energy usage.	Corrective actions are in progress to address the recommendation.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
10/23/2019	4A-CI-00-19-008	Audit of OPM'S Compliance with the Federal Information Technology Acquisition Reform Act – DCOI, GSS – FY 2019	11	Recommendation 11: We recommend that OPM complete and approve a PTA and PIA (if required by the PTA) for the LAN/WAN GSS in accordance with the requirements of the E-Government Act of 2002 and OPM policy.	Since the issuance of this recommendation, the OCIO separated the former LAN/WAN FISMA system into five distinct systems that best align with the aspect of OPM's mission they support. Those systems are Infrastructure & Network Tools (I&N), Endpoint Service (ES), Application Development Tools (ADT), Collaboration Tools (CT), and Cyber General Support System (GSS). Each of these five systems completed a PTA and PIA (if required) in FY2023 as per OPM requirements. Supporting documentation for closure were provided to OIG.
11/18/2019	4A-CF-00-19-022	Office of Personnel Management's Fiscal Year 2019 Consolidated Financial Statements	11	We recommend that the Office of the Chief Information Officer (OCIO), in coordination with system owners, enforce and monitor the implementation of corrective actions to: Establish a means of documenting all users who have access to systems, and all users who had their systems access revoked.	Actions to address the recommendation are in progress.



Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
11/18/2019	4A-CF-00-19-022	Office of Personnel Management's Fiscal Year 2019 Consolidated Financial Statements	10	We recommend that the Office of the Chief Information Officer (OCIO), in coordination with system owners, enforce and monitor the implementation of corrective actions to: Prepare audit logging and monitoring procedures for databases within application boundaries. Review audit logs on a pre-defined periodic basis for violations or suspicious activity and identify individuals responsible for follow up or elevation of issues to the appropriate team members for review. The review of audit logs should be documented for record retention purposes.	Actions to address the recommendation are in progress.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
1/17/2020	4K-ES-00-19-032	Evaluation of the Presidential Rank Awards Program	4	<p>Recommendation 4: We recommend that the Senior Executive Resources Services manager update and finalize its standard operating procedures to include instructions for processing interagency agreement obligation forms for on-site evaluation. The standard operating procedures should include:</p> <ul style="list-style-type: none"> <li>• Instructions for initiating interagency agreement with nominating agencies, processing procedures, collecting payments, and de-obligating funds to ensure:</li> <li>• No work will commence and no costs will be incurred until the agreement is fully executed;</li> <li>• Agreed upon milestones are set each year to ensure agencies are promptly notified when final costs are known; and</li> <li>• Notify agencies promptly to close out agreements before the end of the calendar year.</li> <li>• Ongoing monitoring and quality control measures for the interagency agreements process.</li> </ul>	Supporting documentation has been submitted for closure consideration for the remaining recommendations.
2/27/2020	1H-01-00-18-039	Management Advisory Report related to Prescription Drug Costs in the Federal Employees Health Benefits Program	1	We recommend that OPM conduct a new, comprehensive study by seeking independent expert consultation on ways to lower prescription drug costs in the FEHBP, including but not limited to the possible cost saving options discussed in this report.	Corrective actions are planned and in progress but not yet fully complete.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
2/27/2020	1H-01-00-18-039	Management Advisory Report related to Prescription Drug Costs in the Federal Employees Health Benefits Program	2	We recommend that OPM evaluate any study conducted pursuant to Recommendation 1 and, with due diligence, formulate recommendations and a plan for agency action based on the best interests of the government, the FEHBP, and its enrollees.	Corrective actions are planned and in progress but not yet fully complete.
4/2/2020	4A-RS-00-18-035	OPM's Federal Employees Health Benefits Program and Retirement Services Improper Payments Rate Methodologies	1	We recommend that OPM's Healthcare and Insurance office update its improper payments rate calculation, including a plan to do so with target dates, and documentation of any analysis conducted and conclusions reached in developing the updated methodology. This methodology, at a minimum, should include estimations for the population of FEHBP carriers that have not been audited each year and statistically valid sampling to provide a more accurate representation of improper payments for reporting.	Corrective actions are planned and in progress but not yet fully complete.
4/2/2020	4A-RS-00-18-035	OPM's Federal Employees Health Benefits Program and Retirement Services Improper Payments Rate Methodologies	2	We recommend that Healthcare and Insurance evaluate the data in the FWA Report to determine if the data can be simplified and validated, as necessary, to be used as a tool for its improper payments rate reporting.	Corrective actions are planned and in progress but not yet fully complete.
4/2/2020	4A-RS-00-18-035	OPM's Federal Employees Health Benefits Program and Retirement Services Improper Payments Rate Methodologies	3	We recommend that Healthcare and Insurance work with the FEHBP carriers to develop a process for reporting more uniform data in the FWA Report.	Corrective actions are planned and in progress but not yet fully complete.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
4/2/2020	4A-RS-00-18-035	OPM's Federal Employees Health Benefits Program and Retirement Services Improper Payments Rate Methodologies	10	We recommend that Retirement Services conduct an analysis to determine if other types of data mining reviews can be performed, using the annuity roll data, to identify improper payments.	RS has submitted evidence for closure.
4/2/2020	4A-RS-00-18-035	OPM's Federal Employees Health Benefits Program and Retirement Services Improper Payments Rate Methodologies	11	We recommend that Retirement Services develop a plan of action to utilize the data mining reviews identified in response to Recommendation 10 and report the results of those reviews in its improper payment calculation, including documenting any issues identified.	RS has submitted evidence for closure.
4/2/2020	4A-RS-00-18-035	OPM's Federal Employees Health Benefits Program and Retirement Services Improper Payments Rate Methodologies	4	We recommend that Retirement Services continue to periodically meet with the DNP representatives to discuss new capabilities of the DNP Portal and determine whether it can be a beneficial addition in identifying improper payments for the most susceptible annuity payment cycle(s), i.e., pre-payment and post-payment.	RS has submitted evidence for closure.
4/2/2020	4A-RS-00-18-035	OPM's Federal Employees Health Benefits Program and Retirement Services Improper Payments Rate Methodologies	6	We recommend that Retirement Services analyze the results from previous Over Age 90 projects to determine if the results can be projected to years where the Over Age 90 projects are not conducted and included in RS's improper payments reporting.	OPM experienced technical delays on the current Over Age 90 Project. However, we plan to analyze the results from our next Project.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
4/2/2020	4A-RS-00-18-035	OPM's Federal Employees Health Benefits Program and Retirement Services Improper Payments Rate Methodologies	7	We recommend that all payments made to deceased annuitants be classified as improper in the year in which they are identified.	OPM is working to document the process to capture all improper payments timely.
4/2/2020	4A-RS-00-18-035	OPM's Federal Employees Health Benefits Program and Retirement Services Improper Payments Rate Methodologies	8	We recommend that Retirement Services provide support to show the final results of the 9,169 cases in which reclamation was initiated and the 43 cases referred to the Survivor Processing Section from its review of returned 2016 tax year Form 1099-Rs.	OPM still does not support using resources to review 1099R's from 2016.
4/2/2020	4A-RS-00-18-035	OPM's Federal Employees Health Benefits Program and Retirement Services Improper Payments Rate Methodologies	9	We recommend that Retirement Services maintain support for future reviews of returned Form 1099-Rs, including an accounting of overpayments made to annuitants dropped from the annuity rolls, identified as deceased, or referred for further research and/or drop action, and include the total of such payments in the annual calculation of improper payments.	OPM is continuing to explore methods to document and account for improper payments identified in the review of returned 1099-Rs.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
8/5/2020	4A-DO-00-20-041	Delegation of Authority to Operate and Maintain the Theodore Roosevelt Building and the Federal Executive Institute	1	We recommend that OPM work with GSA to formally request and complete the documentation necessary to effectuate the return of the delegation to operate and maintain the TRB to OPM.	FSEM concurred with this recommendation. GSA informed OPM in July 2019 of their decision to rescind the Delegation of Authority (DOA) effective Oct 2020. Since July 2020, the rescission date was extended three times (July 2020, June 2021, and March 2025). GSA's latest extension was contingent on their further understanding OPM's space needs within the TRB. In extending this date, GSA requested daily occupancy usage data gathered through OPM's Physical Access Control System (PACS) for the months of June 2022 through November 2022. In addition, GSA requested OPM's future space requirements within the TRB to include required storage space and planned personnel actions. OPM intends to provide January 2024 occupancy data to GSA next month. Closure evidence was sent to OIG for review.
8/5/2020	4A-DO-00-20-041	Delegation of Authority to Operate and Maintain the Theodore Roosevelt Building and the Federal Executive Institute	2	We recommend that OPM delay any feasibility study related to its space needs until after completion of the NAPA study and any resulting decision by Congress.	OPM received the final version of the NAPA study on August 11, 2021. Supporting documentation has been submitted for closure consideration.
9/18/2020	4A-CI-00-20-009	Audit of the Agency System Assessment and Authorization Process FY 2020	8	We recommend that OPM develop and implement a process that ensures SOs of contractor- operated systems work with internal process owners, leadership and business managers to create an OPM BIA.	Corrective actions are in progress to address the recommendation and expected to be completed by FY24 Q3.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
10/30/2020	4A-HI-00-19-007	Audit of the Federal Employee Insurance Operations (FEIO) as Administered by OPM's Healthcare and Insurance Program Office	11	We recommend that OPM establish PBM transparency standards for all new, renewed, or amended contracts that are specific to community-rated HMOs.	OPM is gathering evidence to provide to the OIG to support closure of the recommendation.
10/30/2020	4A-HI-00-19-007	Audit of the Federal Employee Insurance Operations (FEIO) as Administered by OPM's Healthcare and Insurance Program Office	12	We recommend that OPM implement the following rate instruction changes: (1) Include transparency standards requiring the carriers to provide support for all claims, encounters, and capitated rates, including those from their provider-owned networks or related entities used in the MLR, rate proposal, and rate reconciliation calculations; and (2) Improve MLR criteria to provide complete, clear, and concise instructions of the FEHBP MLR process, including specific instructions concerning provider-sponsored health plans and capitated arrangements in its cost reporting.	OPM does not concur with this recommendation and will explore further options for closure.
10/30/2020	4A-HI-00-19-007	Audit of the Federal Employee Insurance Operations (FEIO) as Administered by OPM's Healthcare and Insurance Program Office	13	We recommend that OPM develop formal policies to ensure that site visits are conducted every three years for FEHBP carriers in accordance with its control to meet OMB Circular A-123 requirements. If the time and costs to perform the site visits outweigh the benefits, OPM should modify its controls and report new procedures to mitigate risks for the FEHBP payment process.	OPM is gathering evidence to provide to the OIG to support closure of the recommendation.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
10/30/2020	4A-HI-00-19-007	Audit of the Federal Employee Insurance Operations (FEIO) as Administered by OPM's Healthcare and Insurance Program Office	16	We recommend that OPM eliminate the self-certification process for FEDVIP and implement an enrollment verification process that requires documentation to prove family member relationships at the time of enrollment. In the meantime, BENEFEDS, as the sole enrollment portal for FEDVIP, should have the authority to request eligibility documentation that includes marriage and birth certificates.	OPM does not concur with this recommendation and will explore further options for closure.
10/30/2020	4A-HI-00-19-007	Audit of the Federal Employee Insurance Operations (FEIO) as Administered by OPM's Healthcare and Insurance Program Office	22	We recommend that OPM develop standard performance metrics with penalties to be included in all new or renewed contracts with FEDVIP carriers.	OPM is gathering evidence to provide to the OIG to support closure of the recommendation.
10/30/2020	4A-HI-00-19-007	Audit of the Federal Employee Insurance Operations (FEIO) as Administered by OPM's Healthcare and Insurance Program Office	9	We recommend that OPM work with the OCFO to establish internal procedures for properly reviewing and verifying the accuracy and completeness of the working capital schedules reported in the AAS by FFS and ER HMO carriers.	OPM deemed this recommendation Resolved on 9/21/2021. Corrective actions are planned and in progress but not yet fully complete.



Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
10/30/2020	4A-RS-00-19-038	U.S. Office of Personnel Management's Retirement Services' Disability Reconsideration Appeals Process	1	We recommend that RS implement internal controls to ensure that all staff responsible for processing disability cases, including but not limited to Medical Specialists, Paralegals, and Legal Administrative Specialists, take the required training to perform their job functions and that supporting documentation for completed training is maintained.	Corrective actions have been implemented. All personnel responsible for processing disability cases have taken the required training and supporting documentation is completed and maintained.
10/30/2020	4A-RS-00-19-038	U.S. Office of Personnel Management's Retirement Services' Disability Reconsideration Appeals Process	2	We recommend that RS establish a plan to complete the Medical Call-ups that are past the annual review period and stop any payments for which annuitants are no longer eligible.	Corrective actions to address this recommendation are in progress. We have requested additional funding and staffing to address the Medical Call Up workload.
10/30/2020	4A-RS-00-19-038	U.S. Office of Personnel Management's Retirement Services' Disability Reconsideration Appeals Process	3	We recommend that RS ensure that Medical Call-ups are conducted timely and that supporting documentation is maintained.	Corrective actions to address this recommendation are in progress. We have requested additional funding and staffing to address the Medical Call Up workload.
10/30/2020	4A-RS-00-19-038	U.S. Office of Personnel Management's Retirement Services' Disability Reconsideration Appeals Process	4	We recommend that RS investigate the cases due for Medical Call-ups in FY 2019 to determine if improper payments were made and immediately initiate any funds recovery, if applicable.	Corrective actions to address this recommendation are in progress. We have requested additional funding and staffing to address the Medical Call Up workload.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
10/30/2020	4A-RS-00-19-038	U.S. Office of Personnel Management's Retirement Services' Disability Reconsideration Appeals Process	8	We recommend that Retirement Services continue to work with OPM's Office of the Chief Information Officer to establish a modernized Information Technology system that has capabilities to ensure the proper tracking of cases throughout the disability process.	RS and OPM CIO have built an IT modernization plan and have begun development of key applications. However, wide scale implementation will require sustained funding.
3/9/2021	1C-GG-00-20-026	Audit of the Information Systems General Controls at Geisinger Health Plan	1	We recommend that GHP segregate its internal network in order to separate sensitive resources from user-controlled systems.	OPM deemed this recommendation Resolved on 6/30/2021. Corrective actions are planned and in progress but not yet fully complete.
4/1/2021	4A-HI-00-18-026	Management Advisory Report – FEHB Program Integrity Risks Due to Contractual Vulnerabilities	1	We recommend that OPM modify FEHBP contract language for all applicable records retention clauses to require the retention and accessibility of claims for 10 years plus the current year in a manner of OPM/HI's choosing.	Corrective actions for this recommendation are being considered.
4/1/2021	4A-HI-00-18-026	Management Advisory Report – FEHB Program Integrity Risks Due to Contractual Vulnerabilities	10	We recommend that OPM modify FEHBP contracts to clarify the Agency's authority to recoup projected improper payments identified by statistical sampling.	OPM does not concur with this recommendation and will explore further options for closure.
4/1/2021	4A-HI-00-18-026	Management Advisory Report – FEHB Program Integrity Risks Due to Contractual Vulnerabilities	11	We recommend modifying Section 2.6(g), in the amendment to the Coordination of Benefits section of the FFS contract, to allow for the recovery of low dollar claims that result from claims system errors.	Corrective actions to address the recommendation are being considered.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
4/1/2021	4A-HI-00-18-026	Management Advisory Report – FEHB Program Integrity Risks Due to Contractual Vulnerabilities	2	We recommend OPM modify or add language in Section 1.9 of all FEHBP contracts to include all relevant sections and attachments of CL 2017-13, or modify all FEHBP contracts to add relevant language stating that all CLs are an addendum to the contract language and enforceable as a contract requirement.	OPM does not concur with this recommendation and will explore further options for closure.
4/1/2021	4A-HI-00-18-026	Management Advisory Report – FEHB Program Integrity Risks Due to Contractual Vulnerabilities	3	We recommend OPM modify or add language to the appropriate Section of the FFS and ER HMO FEHBP contracts to state that all FWA-related recoveries must be deposited into the working capital or investment account within 30 days and returned to or accounted for in the FEHBP contingency reserve fund account within 60 days after receipt by the carrier.	Corrective actions to address the recommendations are being considered.
4/1/2021	4A-HI-00-18-026	Management Advisory Report – FEHB Program Integrity Risks Due to Contractual Vulnerabilities	4	We recommend that OPM add language to all FEHBP contracts requiring carriers to notify the OIG’s Office of Investigations regarding their intention to share FEHBP fraudulent activity with outside parties, and obtain approval from OIG’s Office of Investigations before sharing this information.	Corrective actions to address the recommendation are being considered.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
4/1/2021	4A-HI-00-18-026	Management Advisory Report – FEHB Program Integrity Risks Due to Contractual Vulnerabilities	5	We recommend that OPM modify or add language to all FFS and ER-HMO FEHBP contracts requiring PBMs or providers under a Large Provider Agreement, who provide services or supplies related to benefit administration, to have an FWA program that meets the OPM contract and CL 2017-13 requirements.	Corrective actions to address this recommendation have been partially completed, while corrective action for the remainder of this recommendation is being considered.
4/1/2021	4A-HI-00-18-026	Management Advisory Report – FEHB Program Integrity Risks Due to Contractual Vulnerabilities	6	We recommend that OPM modify the ER-HMO and FFS contracts to require that vendors under Large Provider Agreements return all FWA-related recoveries to the carrier within 30 days, whereby carriers must deposit these recoveries into their working capital or investment account within 30 days. Once deposited into one of these accounts, the carrier must return the recoveries to the contingency reserve fund.	Corrective actions to address the recommendation are being considered.
4/1/2021	4A-HI-00-18-026	Management Advisory Report – FEHB Program Integrity Risks Due to Contractual Vulnerabilities	7	We recommend that OPM modify Section 2.3(g) and 2.3(g)(ii) to provide expectations for how carriers are to proactively identify overpayments and to define what it means by egregious errors.	Corrective actions to address the recommendation are being considered.
4/1/2021	4A-HI-00-18-026	Management Advisory Report – FEHB Program Integrity Risks Due to Contractual Vulnerabilities	8	We recommend that OPM modify Section 2.3(g) requiring carriers to report on their collection efforts, including how promptly the carrier initiated collection once the erroneous payment was identified and the causes of the claim payment errors.	Corrective actions to address the recommendation are being considered.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
4/1/2021	4A-HI-00-18-026	Management Advisory Report – FEHB Program Integrity Risks Due to Contractual Vulnerabilities	9	We recommend that OPM review the current recovery process in Section 2.3(g)(1) through (5) and consider whether the use of benefit offsets, after the first written notification is sent, would be more cost efficient.	Corrective actions to address the recommendation are being considered.
6/28/2021	1C-8W-00-20-017	Audit of the Federal Employees Health Benefit Operations at UPMC Health Plan, Inc.	1	We recommend that the Plan return \$12,174,183 to the FEHBP for defective pricing in contract years 2014 through 2016.	Corrective actions to address the recommendation are being considered.
6/28/2021	1C-8W-00-20-017	Audit of the Federal Employees Health Benefit Operations at UPMC Health Plan, Inc.	2	We recommend that the Plan remove all HIF loadings from the FEHBP premium rate developments and MLR filing denominators (as applicable) that have been submitted to OPM under Contract CS 2856.	Corrective actions to address the recommendation are being considered.
6/28/2021	1C-8W-00-20-017	Audit of the Federal Employees Health Benefit Operations at UPMC Health Plan, Inc.	10	We recommend that the Plan return \$1,612,812 to the FEHBP for Lost Investment Income (LII), calculated through May 31, 2021. We also recommend that the Plan return LII on amounts due for the period beginning June 1, 2021, until all defective pricing finding amounts have been returned to the FEHBP.	Corrective actions to address the recommendation are being considered.
6/28/2021	1C-8W-00-20-017	Audit of the Federal Employees Health Benefit Operations at UPMC Health Plan, Inc.	11	We recommend that the Contracting Officer adjust the Plan's MLR credit for contract years 2014 through 2016 once the defective pricing findings discussed in this report are resolved.	Corrective actions to address the recommendation are being considered.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
7/29/2021	1H-99-00-20-016	Reasonableness of Selected FEHBP Carriers' Pharmacy Benefit Contracts	1	We recommend that the Contracting Officer direct its carriers to consider pooling their resources into a common PBM agreement, which could potentially not only lower costs to the program but also to its Federal members.	OPM does not concur with this recommendation and will explore further options for closure.
7/29/2021	1H-99-00-20-016	Reasonableness of Selected FEHBP Carriers' Pharmacy Benefit Contracts	2	We recommend that the Contracting Officer complete a data analysis of the claims pricing for all FEHBP carriers who contract with the PBM to determine if the transparency standards are being implemented as intended.	Corrective actions to address the recommendations are being considered.
7/29/2021	1H-99-00-20-016	Reasonableness of Selected FEHBP Carriers' Pharmacy Benefit Contracts	3	We recommend that the Contracting Officer require the carrier contracts to include a true-up to ensure that each carrier receives the full value of all discounts, rebates, credits, or any other financial guarantees or adjustments included within the PBM's contracts with pharmacies. The true-ups should ensure that only the final costs paid to the pharmacies and/or drug suppliers (including any post-POS reconciliations or true-ups) are passed on to the FEHBP.	Corrective actions to address the recommendations are being considered.
10/27/2021	4A-CI-00-21-012	FY 2021 FISMA	17	We recommend that the OCIO implement a process to apply critical operating system and third-party vendor patches in a 30-day window according to OPM policy.	Corrective actions are in progress to address the recommendation.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
11/22/2021	4A-CI-00-20-034	OPM's Office of the Chief Information Officer's Revolving Fund Programs - eOPF	2	We recommend that the OCIO and the HCDMM strengthen internal controls to ensure that all inputs used in the HRS IT PMO and the eOPF office's pricing methodologies are properly reviewed, approved, documented, and properly maintained. Documentation should include but not be limited to detailed reports, calculations, and methodology, to ensure the data is valid, complete, and transparent.	In August 2023, OPM provided documentation to OIG . OIG provided some feedback and requests for additional information. Corrective action is in progress.
2/14/2022	4A-CF-00-20-029	OPM's Utilization of the Improper Payments Do Not Pay Initiative	7	We recommend that OPM continue to work with the DNP Business Center to determine if OPM's program offices are targeting the best processes and data sources to meet their individual program needs of identifying improper payments.	In September 2023, OPM provided documents to address the recommendation. OIG sent some feedback, which OPM has responded. OIG is currently reviewing the documents.
2/23/2022	1A-10-17-21-018	Audit of Claims Processing and Payment Operations at Health Care Service Corporation for Contract Years 2018 through 2020	13	We recommend that the contracting officer direct the Association to update its debarment procedures to include the Guidelines for Implementation of FEHBP Debarment and Suspension Orders (Guidelines) proactive notification requirements.	Corrective actions are planned and in progress but not yet fully complete
2/23/2022	1A-10-17-21-018	Audit of Claims Processing and Payment Operations at Health Care Service Corporation for Contract Years 2018 through 2020	14	We recommend that the contracting officer direct the Association to include all required enrollee notifications as stated in the Guidelines in the messaging to enrollees for debarred providers.	OPM deemed this recommendation Resolved on 01/25/2024. Corrective actions are planned and in progress but not yet fully complete.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
2/23/2022	1A-10-17-21-018	Audit of Claims Processing and Payment Operations at Health Care Service Corporation for Contract Years 2018 through 2020	15	We recommend that the contracting officer direct the Association to notify the OIG monthly of all claims submitted by debarred providers after the effective date of their debarments	Corrective actions are planned and in progress but not yet fully complete
2/23/2022	1A-10-17-21-018	Audit of Claims Processing and Payment Operations at Health Care Service Corporation for Contract Years 2018 through 2020	16	We recommend that the contracting officer direct the Association to review its reporting practices to ensure that all claims paid to debarred providers are reported to the OIG on its Semi-Annual Report (SAR).	Corrective actions are planned and in progress but not yet fully complete
6/23/2022	2022-IAG-002	OPM's Compliance with the Payment Integrity Information Act of 2019	3	We recommend that Retirement Services provide supporting documentation to substantiate that adjusting their FY 2021 reduction target further would be cost and mission prohibitive.	OPM met with OIG to discuss this recommendation on January 17, 2024. OIG is making a determination to close this recommendation.
8/16/2022	1C-59-00-20-043	Audit of the Federal Employees Health Benefits Program Operations at Kaiser Foundation Health Plan, Inc.	1	We recommend that OPM revise or replace the FEHBP MLR requirements to provide a reliable measure of the premium dollars spent on the FEHBP program, including the impact of carrier corporate structure and the current community-rated product market	Corrective actions to address the recommendations are being considered.



Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
8/25/2022	1A-10-15-21-023	Audit of BlueCross BlueShield of Tennessee, Chattanooga, Tennessee	1	We recommend that the contracting officer require the Plan to return \$607,204 to the FEHBP for the claim overpayments that were written off by the Plan without adequate support and/or justification, whether recovered or not, as diligent efforts to recover were not made.	Corrective actions to address the recommendation are being considered.
8/25/2022	1A-10-15-21-023	Audit of BlueCross BlueShield of Tennessee, Chattanooga, Tennessee	3	We recommend that the contracting officer require the Association to implement corrective actions to ensure that the BCBS plans have followed proper overpayment recovery steps and demonstrated diligent recovery efforts, as required by Section 2.3(g) of Contract CS 1039, before the Association approves the plans' claim overpayment write-offs.	Corrective actions are planned and in progress but not yet fully complete+M115
9/12/2022	1G-LT-00-21-013	Audit of the Federal Long Term Care Insurance Program for Contract Years 2017 through 2019	2	We recommend that OPM instruct the Contractor to immediately notify FLTCIP subscribers of the change in funding level assumptions, and any corrective actions being considered to properly fund the program, so that participants have adequate time to plan for premium increases and/or benefit reductions.	OPM is gathering evidence to provide to the OIG to support closure of the recommendation.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
12/12/2022	2022-ERAG-0011	Audit of Premera BlueCross Mountlake Terrace, Washington	1	We recommend that the contracting officer require the Plan to return \$3,198,939 to the FEHBP for the questioned IHS claim overpayments of \$500 or more that were considered uncollectible by the Plan, whether recovered or not, as prompt and diligent efforts to recover, including provider offsets, were not made timely. However, since we verified that the Plan subsequently returned \$1,410,471 of these questioned claim overpayments to the FEHBP, the contracting officer only needs to ensure that the Plan returns the remaining questioned overpayments of \$1,788,468 to the FEHBP.	Corrective actions are planned and in progress but not yet fully complete.
12/14/2022	2022-ISAG-0020	Audit of the Information Systems General and Application Controls at Blue Cross and Blue Shield of Kansas	2	We recommend that BCBSKS remediate the specific technical weaknesses discovered during this audit as outlined in the vulnerability scan audit inquiry that was provided to them.	OPM deemed this recommendation Resolved on 3/31/2023. Corrective actions are planned and in progress but not yet fully complete.
12/14/2022	2022-ISAG-0020	Audit of the Information Systems General and Application Controls at Blue Cross and Blue Shield of Kansas	5	We recommend that BCBSKS develop, document, implement and maintain approved security configuration settings for all operating system platforms and databases deployed in its technical environment.	OPM deemed this recommendation Resolved on 3/31/2023. Corrective actions are planned and in progress but not yet fully complete.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
12/14/2022	2022-ISAG-0020	Audit of the Information Systems General and Application Controls at Blue Cross and Blue Shield of Kansas	6	We recommend that BCBSKS implement a routine process to audit security configuration settings of its servers to ensure compliance with approved security configuration settings. Note – this recommendation cannot be implemented until the controls from Recommendation 5 about developing configuration settings are in place.	OPM deemed this recommendation Resolved on 3/31/2023. Corrective actions are planned and in progress but not yet fully complete.
2/2/2023	2022-CRAG-004	Audit of the Federal Employees Health Benefits Program Operations at MercyCare Health Plans	1	We recommend that the Plan return \$103,555 to the FEHB Program for defective pricing.	Corrective actions to address the recommendation are being considered.
2/2/2023	2022-CRAG-004	Audit of the Federal Employees Health Benefits Program Operations at MercyCare Health Plans	2	We recommend that the Plan return \$4,547 to the FEHBP for Lost Investment Income (LII), calculated through November 30, 2022. We also recommend that the Plan return LII on amounts due for the period beginning December 1, 2022, until all defective pricing finding amounts have been returned to the FEHBP.	Corrective actions to address the recommendation are being considered.
2/8/2023	2022-CAAG-009	Audit of Claims Processing and Payment Operations at Premera Blue Cross for Contract Years 2018 through 2020	1	We recommend that the contracting officer disallow \$1,944,914 in overcharges to the FEHBP for 2,243 claims that were incorrectly paid due to a system error related to the bundling of ambulatory payment classification claims. The Plan did not attempt to identify FEHBP claim overpayments or make efforts to recover the overpayments.	OPM is gathering evidence to provide to the OIG to support closure of the recommendation.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
2/8/2023	2022-CAAG-009	Audit of Claims Processing and Payment Operations at Premera Blue Cross for Contract Years 2018 through 2020	2	We recommend that the contracting officer disallow \$64,500 in duplicate claim payment overcharges to the FEHBP. To date, \$31,019 has been recovered, leaving a remaining amount of \$33,481 due to the FEHBP.	OPM is gathering evidence to provide to the OIG to support closure of the recommendation.
2/8/2023	2022-CAAG-009	Audit of Claims Processing and Payment Operations at Premera Blue Cross for Contract Years 2018 through 2020	4	We recommend that the contracting officer direct the Association to have the Plan adjust all claims to reflect the appropriate member cost share.	OPM is gathering evidence to provide to the OIG to support closure of the recommendation.
2/8/2023	2022-CAAG-009	Audit of Claims Processing and Payment Operations at Premera Blue Cross for Contract Years 2018 through 2020	5	We recommend that the contracting officer direct the Association to ensure the Plan notifies the members of the amounts they overpaid and direct the providers to reimburse them.	OPM is gathering evidence to provide to the OIG to support closure of the recommendation.
2/8/2023	2022-CAAG-009	Audit of Claims Processing and Payment Operations at Premera Blue Cross for Contract Years 2018 through 2020	6	We recommend that the contracting officer direct the Association to implement FEP-wide policies for local plans to follow to ensure member cost-share overcharges are properly reimbursed to them.	OPM is gathering evidence to provide to the OIG to support closure of the recommendation.
2/15/2023	2022-CRAG-0010	Audit of the Federal Employees Health Benefits Program Termination Process at Health Plan of Nevada, Inc.	16	We recommend that OPM conduct a comprehensive overview of the 2809/834 Companion Guides and 834 layouts to address dependent terminations due to tier reductions and changes to ensure all possible value combinations advise Carriers of the applicability of the 31-day Extension of Coverage (EOC) as required under the Standard Contract terms.	OPM does not concur with this recommendation and will explore further options for closure.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
2/15/2023	2022-CRAG-0010	Audit of the Federal Employees Health Benefits Program Termination Process at Health Plan of Nevada, Inc.	17	We recommend that OPM conduct a comprehensive overview of the paper SF 2809 and the OPM 2809 Form to ensure all necessary information is reported for Carriers to process dependent terminations and determine 31-day EOC applicability as required under the Standard Contract terms.	OPM does not concur with this recommendation and will explore further options for closure.
2/15/2023	2022-CRAG-0010	Audit of the Federal Employees Health Benefits Program Termination Process at Health Plan of Nevada, Inc.	18	We recommend that OPM request that National Finance Center (NFC) revise the Centralized Enrollment Clearinghouse (CLER) system platform to establish an excessive discrepancy code fail count threshold and oversee the system to hold both agency payroll offices and Carriers accountable for making progress to resolve all discrepancy codes within an established period of time.	OPM does not concur with this recommendation and will explore further options for closure.
2/15/2023	2022-CRAG-0010	Audit of the Federal Employees Health Benefits Program Termination Process at Health Plan of Nevada, Inc.	19	We recommend that OPM develop procedures to monitor and enforce progress towards resolution of the CLER for fail counts of 4 or higher for code 160. This includes ensuring payroll offices and Carriers are aware of and resolving the enrollment discrepancies. OPM should also consistently adjust Carrier Plan Performance Assessments for excessive discrepancy code 160 fail counts as a method of enforcing the terms of the Standard Contract.	OPM is gathering evidence to provide to the OIG to support closure of the recommendation.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
2/15/2023	2022-CRAG-0010	Audit of the Federal Employees Health Benefits Program Termination Process at Health Plan of Nevada, Inc.	20	We recommend that OPM review its current and archived FEHB Carrier Letters (CL) on its website, OPM.gov, to ensure that all CLs are posted and available for Carriers and other users.	Corrective actions are planned and in progress but not yet fully complete.
2/16/2023	1H-08-00-21-015	Audit of Group Health Incorporated's Federal Employees Health Benefits Program Pharmacy Operations as Administered by Express Scripts, Inc. for Contract Years 2015 through 2019	1	We recommend that OPM's Contracting Officer require the Carrier to return \$11,251,490 to the FEHBP for pass-through transparent drug pricing that was not received from the PBM for CYs 2015 through 2019.	Corrective actions to address the recommendation are being considered.
2/16/2023	1H-08-00-21-015	Audit of Group Health Incorporated's Federal Employees Health Benefits Program Pharmacy Operations as Administered by Express Scripts, Inc. for Contract Years 2015 through 2019	2	We recommend that OPM's Contracting Officer assess the Carrier \$1,228,855 for Lost Investment Income (LII) on the questioned costs due back to the FEHBP for this finding, calculated through December 31, 2022. The LII should be adjusted to account for the date the questioned costs are returned to the program.	Corrective actions to address the recommendation are being considered.
2/16/2023	1H-08-00-21-015	Audit of Group Health Incorporated's Federal Employees Health Benefits Program Pharmacy Operations as Administered by Express Scripts, Inc. for Contract Years 2015 through 2019	3	We recommend that OPM's Contracting Officer require the Carrier to return \$816,814 to the FEHBP for its portion of the PBM's non-specific drug discounts that were not received due to the Carrier's failure to move its FEHBP experience-rated group to a transparent PBM arrangement with pass-through pricing for CYs 2015 through 2019.	Corrective actions to address the recommendation are being considered.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
2/16/2023	1H-08-00-21-015	Audit of Group Health Incorporated's Federal Employees Health Benefits Program Pharmacy Operations as Administered by Express Scripts, Inc. for Contract Years 2015 through 2019	4	We recommend that OPM's Contracting Officer assess the Carrier \$100,559 for LII on the questioned costs due back to the FEHBP for this finding, calculated through December 31, 2022. The LII should be adjusted to account for the date the questioned costs are returned to the program.	Corrective actions to address the recommendation are being considered.
2/16/2023	1H-08-00-21-015	Audit of Group Health Incorporated's Federal Employees Health Benefits Program Pharmacy Operations as Administered by Express Scripts, Inc. for Contract Years 2015 through 2019	5	We recommend that OPM's Contracting Officer require the Carrier to return \$531,868 to the Letter of Credit Account (LOCA) for drug pricing guarantees that were paid by the PBM to the Carrier for the FEHBP's portion of pharmacy claims from CYs 2015 through 2019.	The Carrier disagrees with this recommendation and OPM is exploring corrective actions to address this recommendation.
2/16/2023	1H-08-00-21-015	Audit of Group Health Incorporated's Federal Employees Health Benefits Program Pharmacy Operations as Administered by Express Scripts, Inc. for Contract Years 2015 through 2019	6	We recommend that OPM's Contracting Officer assess the Carrier \$56,697 for LII on the questioned costs due back to the FEHBP for this finding, calculated through December 31, 2022. The LII should be adjusted to account for the date the questioned costs are returned to the program.	Corrective actions to address the recommendation are being considered.

Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
2/16/2023	1H-08-00-21-015	Audit of Group Health Incorporated's Federal Employees Health Benefits Program Pharmacy Operations as Administered by Express Scripts, Inc. for Contract Years 2015 through 2019	7	We recommend that OPM's Contracting Officer require the Carrier to return \$957,512 to the FEHBP for the underpayment of drug manufacturer rebates and corresponding administrative fees that were withheld by the PBM for CYs 2015 through 2019.	Corrective actions to address the recommendation are being considered.
2/16/2023	1H-08-00-21-015	Audit of Group Health Incorporated's Federal Employees Health Benefits Program Pharmacy Operations as Administered by Express Scripts, Inc. for Contract Years 2015 through 2019	8	We recommend that OPM's Contracting Officer assess the Carrier \$90,895 for LII on the questioned costs due back to the FEHBP for this finding, calculated through December 31, 2022. The LII should be adjusted to account for the date the questioned costs are returned to the program.	Corrective actions to address the recommendation are being considered.
2/16/2023	1H-08-00-21-015	Audit of Group Health Incorporated's Federal Employees Health Benefits Program Pharmacy Operations as Administered by Express Scripts, Inc. for Contract Years 2015 through 2019	9	We recommend that the Carrier return \$45,986 to the FEHBP for the Federal group's portion of the penalties that were paid by the PBM to the Carrier for missed performance guarantees from CYs 2015 through 2019.	Corrective actions to address the recommendation are being considered.



Final Report Date	Audit Number	Title	Recommendation Number	Recommendation Detail	Status
2/16/2023	1H-08-00-21-015	Audit of Group Health Incorporated's Federal Employees Health Benefits Program Pharmacy Operations as Administered by Express Scripts, Inc. for Contract Years 2015 through 2019	10	We recommend that OPM's Contracting Officer assess the Carrier \$5,595 for LII on the questioned costs due back to the FEHBP for this finding, calculated through December 31, 2022. The LII should be adjusted to account for the date the questioned costs are returned to the program.	Corrective actions to address the recommendation are being considered.
2/27/2023	2022-ISAG-0024	Audit of Information Systems General and Application Controls at American Postal Workers Union Health Plan	16	We recommend that APWUHP remove or acquire extended support for all unsupported software in its IT environment.	Corrective actions to address the recommendation are being considered.

## List of Acronyms

ACE	Agency Compliance and Evaluation
AEB	Assessment and Evaluation Board
AI	Artificial Intelligence
APGs	Agency Priority Goals
API	Application Processing Interface
ARC	Administrative Resource Center
ASG	Administrative Sanctions Group
BIE	Bureau of Indian Education
BIL	Bipartisan Infrastructure Law
BPA	Blanket Purchase Agreement
CAF	Control Access Fee
CBJ	Congressional Budget Justification
CDC	Center of Disease Control
CFC	Combined Federal Campaign
CFO	Chief Financial Office
CFR	Code of Federal Regulations
CHCO	Chief Human Capital Officer
CHCOC	Chief Human Capital Officers Council
CIGIE	Council of the Inspector General on Integrity and Efficiency
CIO	Chief Information Office
CLD	Center of Leadership Development
CLIA	Congressional, Legislative and Inter-Governmental Affairs
CM IPS	Credit Monitoring & Identity Protection Services
CMS	Center for Management Services
COLA	Cost of Living Adjustment
COTS	Commercial-off-the-shelf
COVID	Coronavirus
CPM	Compensation Policy Memoranda
CSRDF	Civil Services Retirement and Disability Fund

CSRS	Civil Service Retirement System
DCFSA	Dependent Care Flexible Spending Account
DCSA	Defense Counterintelligence and Security Agency
DEIA	Diversity, Equity, Inclusion, and Accessibility
DFS	Digital File System
DISA	Defense Information Systems Agency
DITCO	Defensive Information Technology Contracting Organization
DLA	Defense Logistics Agency
DOD	Department of Defense
DOJ	U.S. Department of Justice
DOL	Department of Labor
DOT	U.S. Department of Transportation
DSMM	Data Standards Management and Modernization
EAP	Enterprise Acquisition Policy
EEO	Equal Employment Opportunity
EEOC	U.S. Equal Employment Opportunity Commission
EHRI	Enterprise Human Resources Integration
EHRIDW	Enterprise Human Resources Integration Data Warehouse
eOPF	Electronic Official Personnel Folders
EPA	U.S. Environmental Protection Agency
ER	Employee Relations
ES	Employee Services
EX	Executive Schedule
FEB	Federal Executive Boards
FEDRAMP	Federal Risk and Authorization Management Program
FEDVIP	Federal Employees Dental and Vision Insurance Program
FEGLI	Federal Employees' Group Life Insurance
FEHB	Federal Employees Health Benefits Program
FEHBF	Federal Employees Health Benefits Fund
FEHB	Federal Employees Health Benefits
FEI	Federal Executive Institute

FEIO	Federal Employees Insurance Operations
FERCCA	Federal Erroneous Retirement Coverage Correction Act
FERS	Federal Employees Retirement System
FEVS	Federal Employee Viewpoint Survey
FFS	Federal Financial System
FHRI	Federal HR Institute
FITARA	Federal Information Technology Acquisition Reform Act
FLTCIP	Federal Long-Term Care Insurance Program
FOIA	Information Management and Freedom of Information Act
FPRAC	Federal Prevailing Rate Advisory Committee
FRAE	Further Revised Annuity Employees
FSAFEDS	Flexible Spending Accounts for Federal Employees
FSC	Federal Staffing Center
FSEM	Facilities, Security, and Emergency Management
FTE	Full-time Equivalent
FY	Fiscal Year
GAO	Government Accountability Office
GS	General Schedule
GSA	General Services Administration
H.R.	United States House of Representatives
HC	Human Capital
HCaTS	Human Capital and Training Solutions
HCBRM	Human Capital Business Reference Model
HCDMM	Human Capital Data Management and Modernization
HCFA	Health Care Flexible Spending Accounts
HCIS	Human Capital Industry Solutions
HCPPO	Human Capital Policy Performance and Operations
HHS	U.S. Department of Health and Human Services
HI	Healthcare and Insurance
HISP	High Impact Service Provider
HMO	Health Maintenance Organization

HR	Human Resources
HRIT	Human Resources Information Technology
HRLOB	Human Resource Line of Business
HRQSMO	HR Quality Services Management Office
HRS	Human Resource Solutions
HRSES	Human Resources Strategy and Evaluation Solutions
HRSITPMO	Human Resources Solutions Information Technology Program Management Office
HRSTRAT	HR Strategy
HX	Hiring Experience
IAA	Inter-agency Agreement
IHCIA	Indian Health Care Improvement Act
IJA	Infrastructure Investment and Jobs Act
IPS	Identity Protection Services
IT	Information Technology
LDS	Leadership for a Democratic Society
LEX HCFS	Limited Expense Health Care Flexible Spending Account
LGBTQ+	Lesbian, Gay, Bisexual, Transgender, and Queer
LOB	Line of Business
LOC	Letter of Credit
MA/IDIA	Multiple Awards, Indefinite Delivery/Indefinite Quantity
MAESC	Multi-Agency Executive Strategy Council
ML	Machine Learning
MSAC	Merit System Accountability & Compliance
MSPB	Merit Systems Protection Board
MVP	Minimum Viable Product
NAPA	National Academy of Public Administration
NASA	National Aeronautics and Space Administration
NIST	National Institute of Standards and Technology
OA	Office of Audits
OC	Office of Communications

OCFO	Office of the Chief Financial Officer
OCIO	Office of the Chief Information Officer
OCM	Organization Change Management
OD	Office of the Director
ODEIA	Office of Diversity, Equity, Inclusion, and Accessibility
ODNI	Office of the Director of National Intelligence
OE	Office of Evaluations
OES/ExecSec	Office of the Executive Secretariat
OESPIM	Office of the Executive Secretariat, Privacy, and Information Management
OGC	Office of the General Counsel
OGE	Office of Government Ethics
OI	Office of Investigations
OIG	Office of the Inspector General
OLLA	Office of Legal and Legislative Affairs
OM	Office of Management
OMB	Office of Management and Budget
OPIM	Office of Privacy and Information Management
OPM	Office of Personnel Management
OPO	Office of Procurement Operations
OSDBU	Office of Small and Disadvantaged Business Utilization
ORA	Online Retirement Application
P.L.	Public Law
PAC	Performance Accountability Council
PDS	Program Development and Support
PIN	Personal Identification Number
PIV	Personal Identity Verification
PMF	Presidential Management Fellows
PMIG	Performance Management Standards Implementation Guidance
PMO	Program Management Office
PPIP	Performance and Process Improvement Program
PSHB	Postal Service Health Benefits

PSRA	Postal Service Reform Act
PSRHB	Postal Service Retiree Health Benefit Fund
QSMO	Quality Service Management Office
RAE	Revised Annuity Employees
REHB	Retired Employees Health Benefits
RF	Revolving Fund
ROI	Return on Investment
RS	Retirement Services
S&E	Salaries & Expenses
SAM	System Acquisition Management
SCRM	Supply Chain Risk Management
SES	Senior Executive Service
SL	Senior Level
SME-QA	Subject Matter Expert Qualification Assessment
SSA	Social Security Administration
SSC	Security, Suitability, and Credentialing Programs
SSCLOB	Security, Suitability and Credentialing Line of Business
SSP	System Security Plan
ST	Scientific and Professional
SuitEA	Suitability Executive Agent
SUM	Spend Under Management
TAAG	Talent Acquisition Analytics Group
TCU	Tribal Colleges and Universities
TFA	Trust Fund Annual
TFM	Trust Funds Modernization
TMF	Technology Modernization Fund
TRB	Theodore Roosevelt Building
TSA	Transportation Security Administration
U.S.C.	United States Code
USAL	USA Learning
USAP	USA Performance

USDA	U.S. Department of Agriculture
USDS	U.S. Digital Service
USPS	United States Postal Service
VA	Department of Veterans Affairs
VERA	Voluntary Early Retirement Authority
VISP	Voluntary Separation Incentive Payment
WPI	Office of Workforce Policy and Innovation





## U.S. Office of Personnel Management

Office of the Chief Financial Officer  
1900 E Street NW  
Washington, DC 20415

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