



Securing today
and tomorrow

Social Security Administration

Human Capital Operating Plan

Fiscal Years 2024–2026



Table of Contents

Message from the Commissioner	3
Message from the Chief Human Capital Officer	4
Executive Summary	5
Introduction	7
Our Organization	8
Our Vision, Mission, and Programs	9
Our Structure	10
Our Workforce.....	11
Strengths, Weaknesses, Opportunities, and Threats.....	13
Our Human Capital Strategy	15
The Future of Work.....	16
Goal 1: Transform SSA into an Employer of Choice	17
Goal 2: Improve Workplace Conditions to Drive Engagement	25
Goal 3: Invest in Learning and Development.....	32
Our Implementation and Accountability	39
Performance Measures and Targets	40
FY 2023 Accomplishments	51
Implementation Considerations	52
Appendices	54
Appendix A: Strategic Alignment	55
Appendix B: Human Capital Evaluation System	57
Appendix C: A New Workforce Planning Approach	60
Appendix D: Workforce Data	61
Appendix E: Leadership and Core Competency Model	70
Appendix F: HCOP Governance Structure and Key Officials	71
Appendix G: Key Stakeholders.....	73
Appendix H: Long-Term Human Capital Management Improvement Plan.....	75

Message from the Commissioner



As Commissioner of the Social Security Administration (SSA), I am pleased to present our Human Capital Operating Plan (HCOP) for fiscal years (FY) 2024-2026, to support our most valuable asset—our workforce.

My top priority is to improve customer service by harnessing the talents, ideas, and compassion of our employees. Millions of people depend on our timely, quality service. We are serving more beneficiaries than ever before with the lowest levels of staffing since the last century.

As a result, we face customer service challenges: 1) Long wait times on our National 800 Number; 2) a growing backlog for disability determinations; and 3) overpayment and underpayment inequities. These challenges are cross-cutting and require data-driven decision-

making to improve our performance. However, staffing shortages brought on by years of underfunding have contributed to long waits for vital services.

Adequate and sustained funding for year-round hiring is key to rebuild staffing levels in our field offices, teleservice centers, processing centers, hearings offices, and other parts of the agency. Retaining and recruiting motivated employees will also help us meet current and future service delivery needs. Our retention strategies include improving training programs, expanding career and professional development opportunities, and addressing any systemic barriers to advancement.

This HCOP details our priorities and goals for the next three fiscal years and our FY 2023 accomplishments. We have dedicated public servants, and by investing in our current and future workforce, we can reduce customer wait times, clear backlogs, and effectively serve the American public.

I affirm that the performance data in this report is complete, reliable, and accurate.

Respectfully,

Martin O'Malley
Commissioner



Securing today
and tomorrow



Message from the Chief Human Capital Officer

Our Fiscal Years (FY) 2024-2026 Human Capital Operating Plan (HCOP) renews our commitment to focus on human capital by developing a holistic approach that addresses our most valuable resource – our employees.

Now more than ever, the HCOP is important to the health and sustainability of our agency. Like many Federal agencies, we face unprecedented human capital challenges as our attrition rates have increased over the past year. This plan represents our commitment to ensure that all SSA employees have the tools, resources, and skills they need to complete their work successfully. A trained, inclusive, engaged, and empowered workforce, with the proper tools to do their jobs, is critical to our success in providing quality service to the public. The HCOP incorporates valuable input from various stakeholders, including employees, managers, human resources directors, labor unions, management associations, and advisory councils. I thank all the contributors who took the time to provide us feedback.

Our HCOP specifically supports SSA’s FYs 2022-2026 Agency Strategic Plan (ASP) goal to “Build an Inclusive, Engaged, and Empowered Workforce.” To accomplish this goal, we assembled a Workforce Planning Governance Board (WPGB) and a Workforce Planning Integration Team (WPIT) to represent every business unit throughout the agency. The WPGB and WPIT identify and prioritize human capital challenges and develop creative strategies and solutions. With their collaboration, we developed three foundational human capital focus areas: (1) Recruitment and Hiring, (2) Employee Engagement, and (3) Employee Development. Success requires commitment from every level of our workforce, including executives, managers, and employees. We outline clear roles and responsibilities within the implementation section of this plan to achieve measurable results and ultimate success. I firmly believe that if we take care of our employees as outlined in this plan, they will continue their unwavering care of the public we proudly serve.

Darlynda K. Bogle
Deputy Commissioner for Human Resources

Executive Summary

The public's need for our programs is growing, putting a greater demand on our workforce of over 61,000 employees as of the end of FY 2023. Over the years, our employees have faced significant increases in workloads. In FY 2022, we reached a historic low number of permanent staff, after decreasing approximately seven percent over the last five years in our total onboard strength. We have seen a corresponding decline in our employee satisfaction and engagement over the past few years.

To address the needs of our workforce now and in the future, we need a proactive approach to human capital management. Our FY 2024-2026 HCOP establishes three goals that align with the [President's Management Agenda](#), our [ASP](#), and [Annual Performance Report \(APR\)](#). Our goals are:

1. Transform the Agency into an Employer of Choice

Beginning in FY 2019, voluntary/non-retirement separations (e.g., transfer, resignation) exceeded the number of retirement separations and comprised a greater percentage of the total number of separations, leading to our lowest staffing level in more than 25 years by FY 2022.

Attracting and retaining new hires has been a challenge. Our direct service structure hampers our ability to compete with the workplace flexibilities of other similar agencies (e.g., Internal Revenue Service, Veterans Affairs) and the pay and benefit flexibilities of the private sector. Competition for entry-level talent since the COVID-19 pandemic has been particularly difficult since the private sector is raising wages to adjust for market demands and high inflation.

To address these challenges, we are transforming into an Employer of Choice through restructuring and modernizing our approach to hiring and recruitment. We will leverage new recruitment tools, resources, and relationships to reinvigorate the SSA brand and increase outreach to a diverse population of new recruits. We will enhance our competitive advantage for acquiring new recruits. We will expand our workforce data analytics program to include hiring, development, retention, and engagement analysis.

2. Improve Workplace Conditions to Drive Engagement

Although our FY 2023 employee engagement Federal Employee Viewpoint Survey (FEVS) score is at 65 percent, our score has trended lower than our government peers for the last four years. Our employees report burnout and managing workloads as major concerns. The lack of staff and increasing workloads has caused low morale, with our employees feeling overworked and overwhelmed.

Our employees also report that they are not satisfied with the recognition they receive for their performance. Our employees also report dissatisfaction with the information they receive from management.

To address our employees' concerns, we are focused on improving workplace conditions to drive engagement. We will prioritize employee well-being by developing and marketing new and existing work-life resources. We will address employee burnout and stress by providing guidance, tools, and training, and we will support work-life balance. We will encourage greater employee recognition by emphasizing the importance of both formal and informal awards from supervisors and peers. We will also provide training and support to help managers foster greater employee engagement agency wide. We will promote a culture of inclusivity by encouraging managers to engage employees in decision-making, where feasible.

3. Invest in Learning and Development

Increasing staff attrition has resulted in a loss of institutional knowledge across our agency. To address this challenge, we will implement several initiatives to invest in ongoing learning and development opportunities for our employees to ensure employee collaboration, knowledge sharing, and knowledge transfer.

We will utilize data-based assessments to identify competency gaps and develop comprehensive gap mitigation strategies. We will promote and market innovative training and development opportunities to ensure we are meeting employee training needs. We will invest in current and future leaders through modernized leadership development programs. Each of these initiatives will help us to leverage the skills and abilities of our workforce.

Conclusion

We must adapt to the dynamics of our changing workforce and prepare for the future. To do this, we must develop innovative ways to recruit talent, develop competencies, share knowledge and expertise, and create a work environment that supports employees' diverse interests in professional development, upward mobility, and work-life balance.

This HCOP provides a roadmap to address our current and future human capital challenges and identifies specific, actionable initiatives to mitigate barriers to long-term workforce sustainability.

This plan illustrates our commitment of resources to support our most valuable asset – our employees. Most importantly, this plan reflects the combined human capital interests of the various stakeholders across the agency. The continued commitment, collaboration, and input of those stakeholders are essential to the success of this plan.

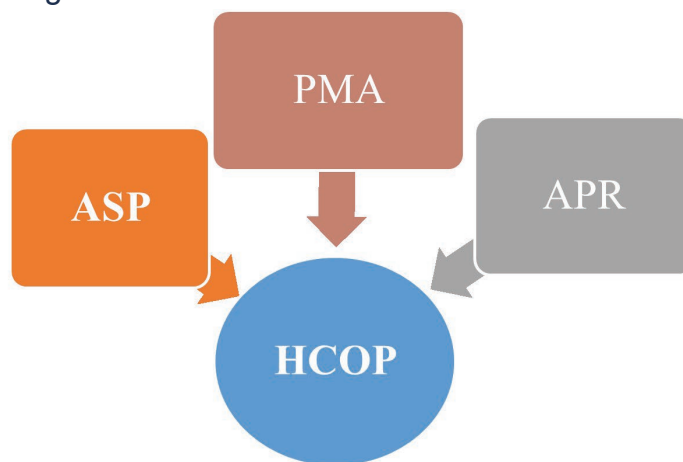
Introduction

The HCOP presents our multi-year strategy to address the needs of our current and future workforce. This plan serves as the foundation for an agency-wide community of practice around strategic thinking, workforce planning, and human resources (HR) project and program management to ensure the workplace experiences of our current and prospective employees foster a quality customer experience that the public desires and deserves.

Our HCOP focuses on building and sustaining a diverse, empowered, and engaged workforce in direct support of the [President's Management Agenda](#) (PMA). The plan is one platform for the Chief Human Capital Officer (CHCO) to communicate with senior leaders and other stakeholders about the agency's current and anticipated workforce challenges and planned strategic solutions to mitigate them. It also helps to prioritize the efforts of managers and HR personnel on key priorities that support the strategic direction.

Our HCOP complies with government-wide guidance and frameworks. It aligns with the strategic and performance planning timelines of the government Performance and Results Modernization Act and with the government-wide priorities presented in the [Federal Workforce Priorities Report](#) (FWPR), [Government-Wide Strategic Plan to Advance DEIA in the Federal Workforce](#), and the Office of Personnel Management's (OPM) [Human Capital Framework](#) (HCF). It also operationalizes the human capital elements stated within the [ASP](#) and the combined Annual Performance Plan and Report, also referred to as the [APR](#). See Figure 1 to illustrate how the HCOP supports and aligns with the PMA, ASP, and APR.

Figure 1: HCOP Strategic Alignment



Our framework includes actionable goals and objectives, key initiatives, milestones, and outcome-based performance measures and targets. We leverage data to establish baseline performance, monitor progress, and implement course corrections to our workforce strategy. This structure supports ongoing evaluation and continuous improvement of our strategy. We analyze and incorporate results in subsequent FY planning.

Our Organization

Our Vision, Mission, and Programs

Vision

Provide income security for the diverse population we serve.

Mission

Ensure equity and accessibility in delivering Social Security services by improving the customer experience and addressing systemic barriers to participation in our programs.

Programs

We administer three programs under the Social Security Act:

- **Old Age and Survivors Insurance (OASI):** Established in 1935, the OASI program provides monthly retirement and survivors benefits to qualified workers and their family members. In FY 2023, we paid OASI benefits to an average of 58 million beneficiaries each month and we paid almost \$1.2 trillion to OASI beneficiaries through the fiscal year.
- **Disability Insurance (DI):** Established in 1956, the DI program provides monthly benefits for workers who become disabled and to their families. In FY 2023, we paid DI benefits to an average of 9 million beneficiaries each month and we paid \$149.4 billion to DI beneficiaries through the fiscal year.
- **Supplemental Security Income (SSI):** Established in 1972, the SSI program provides monthly financial support to aged, blind, and disabled adults and children who have limited income and resources. In FY 2023, we paid SSI payments to a monthly average of 7.5 million recipients (approximately 2.5 million of whom concurrently receive OASI or DI benefits) and we paid over \$63 billion in SSI Federal benefits and State supplementary payment through the fiscal year.

Our Structure

As of the end of FY 2023, over 61,000 Federal employees and 15,000 State employees served the public from a network of more than 1,500 offices across the country and around the world. We administer our programs and services online, by phone, and in person in our offices. Our customers can access online services such as applying for retirement, disability, and Medicare benefits, checking the status of an application or appeal, or requesting a replacement Social Security card.

A diverse, engaged, and well-trained workforce is critical to meeting our service delivery goals. Our employees either directly serve the public or provide support to employees who do. We support our employees throughout their chosen career paths with employee engagement, training, and development.

Disability determination services (DDS) in the States, District of Columbia, and Puerto Rico, make disability determinations for initial claims, reconsiderations, continuing disability reviews (CDR), and CDR appeals. Challenges with hiring and retaining staff have limited the DDSs' capacity to improve disability workload performance.

Administrative Law Judges (ALJ) in our hearing offices and administrative appeals judges in our Appeals Council decide appealed cases. By the end of FY 2024, we plan to achieve our goal of eliminating the ALJ disability hearings backlog.

Our processing centers (PC) handle the most complex benefit payment decisions, in addition to issuing benefit payments after appeals decisions, determining and collecting debt, correcting records, and performing program integrity work.

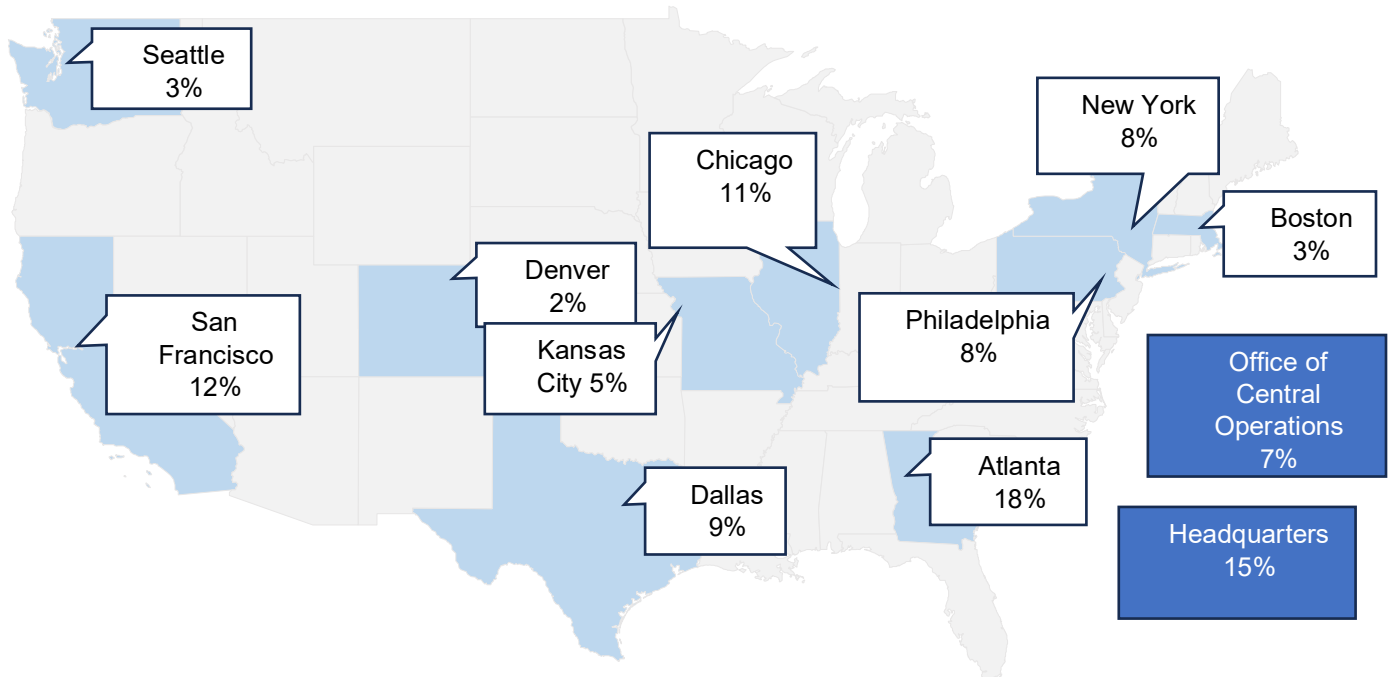
Our teleservice centers answer a broad range of Social Security and Medicare questions, schedule appointments for our field offices, provide status updates on current claims or appeals, and ensure the accuracy of our records.

For more information about our organization and its functions, visit our [organizational structure](#).

Our Workforce

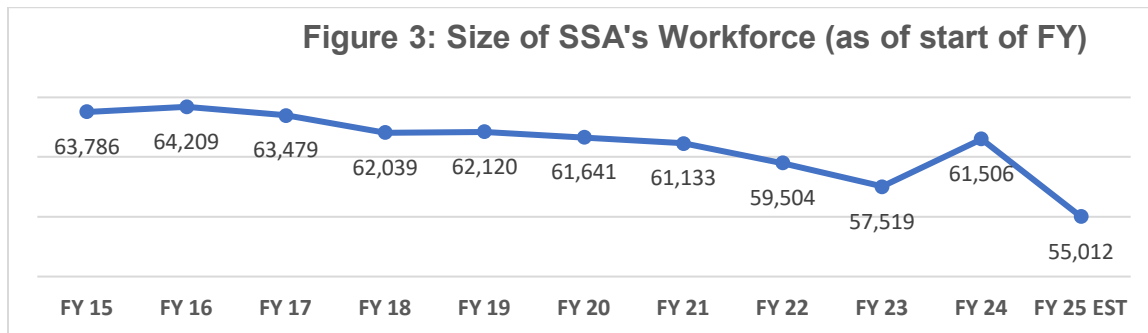
As of the end of FY 2023, our workforce included over 61,000 permanent employees, with an average age of 47 and an average of 15 years of Federal service. Eighty-six percent of our workforce is organized in local field and hearings offices across the country. See Figure 2 for how our employees are distributed among our Regions, in our headquarters, and in our Office of Central Operations.

Figure 2: Employee Workforce Distribution



Note: Due to rounding, the sum of regional percentages may not add up to 100% when reflected as whole percentages without decimals.

In FY 2022, our workforce reached a historic low number of permanent employees after decreasing seven percent over the last five years due to attrition and hiring freezes. With the increase in funding we received, we began restoring our staffing levels in FY 2023, and our staffing increased to over 61,000 employees at the end of FY 2023. However, due to the austere budget, we implemented a hiring freeze in the first half of FY 2024, which has reversed the progress we made in FY 2023. See Figure 3 to illustrate how SSA's workforce has decreased in size.



Workforce Highlights

- Due to a hiring surge, FY 2023 hires outpaced losses for the first time since FY 2018, increasing the on-board strength by 5 percent over the end of FY 2022. The overall separation rate declined to 8 percent in FY 2023, after reaching a peak of 10 percent in FY 2022. However, at approximately 61,000, the end of FY 2023 onboard strength remains below the FY 2018 workforce.
- Due to a hiring freeze in the first half of FY 2024, separations have outpaced hires in FY 2024, which has caused us to lose the gains we acquired during the hiring surge in FY 2023.
- The resignation rate has increased 14 percentage points since FY 2020 and was the primary reason for separations in FY 2023. In FY 2023, resignations were responsible for 41 percent of all separations, compared to 27 percent attributed to retirement.
- Retention of our new hires decreased drastically in recent years, with just 61 percent of those hired in FY 2021 retained for two years or more (compared to an average of 81 percent throughout the 2010 decade).
- Retirement eligibility trends remain steady. As of the end of FY 2023, approximately 13 percent of our workforce is eligible to retire.
- Employee feedback across various surveys reflects ongoing concerns with heavy workloads, personal health, pay, job fit, and family responsibilities among new hires, current employees, and those who separated from the agency.
- The diversity of our workforce is one of our greatest strengths, with racial and ethnic minorities representing over 50 percent of employees. Our workforce exemplifies a stable representation of veterans and individuals with disabilities. Our staff comprises five generations, the largest of which is Generation X (born between 1965-1980) at 50 percent. However, our representation of veterans is lower than the government-wide benchmark (15 percent compared to 32 percent). See [Appendix D](#) for additional details about our workforce.

Strengths, Weaknesses, Opportunities, and Threats

We conducted an environmental scan to inform our HCOP. A key element of our scan was a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis, which is a tool for evaluating the current state of an organization for strategy formulation and planning purposes. We developed our human capital goals and objectives based on the results of the SWOT analysis. The chart below summarizes the results of our SWOT analysis.

<p>Strengths</p>	<ul style="list-style-type: none"> • Commitment to public service, program integrity, public trust, and the SSA mission. • Multi-cultural and multi-generational workforce. • Commitment to principles of DEIA. • Digital services to optimize the customer experience. • Investment in modernizing Information Technology (IT). • Use of data analytics and predictive modeling to drive decision-making. • Senior leader communications for engagement and transparency. • Use of hiring authorities to fill certain mission-critical positions. • Emphasis on employee well-being by developing and marketing work-life resources to address mental health and wellness.
<p>Weaknesses</p>	<ul style="list-style-type: none"> • Not enough time to develop or train staff. • High workloads leading to employee burnout. • High staff attrition and loss of technical and institutional knowledge. • Low levels of employee satisfaction and morale. • Non-competitive salaries compared to other public agencies and private sector. • Lengthy onboarding process. • Limited workplace flexibilities. • Mismatch between employee skills and job requirements. • Limited employee involvement in decision-making. • Inconsistent acknowledgment and recognition of employee performance. • Distrust in performance management systems for addressing poor performers.
<p>Opportunities</p>	<ul style="list-style-type: none"> • Technological advancements and use of automation. • High quality and expanded talent pools. • Strategic partnerships with external organizations (for recruitment and outreach). • Availability of a variety of Federal hiring authorities to fill positions. • Social media platforms as recruitment tools.

Threats

- Labor shortages.
- Increased competition for talent.
- Competitors offering greater workplace flexibility, career growth, and higher salaries.
- Budget constraints.
- Federal pay system and qualification requirements.

Our Human Capital Strategy

The Future of Work

Goals

Strategic Objectives

Strategic Initiatives

Key Milestones

The Future of Work

We must prepare our future workforce to meet our mission and goals as expressed in our ASP. This HCOP illustrates how we are addressing demographics shifts, expectations of new recruits, and advances in technology to effectively manage human capital.

Workforce Make-Up

The future workforce will be the most multi-generational in history, boasting at least four generations – each functioning from different backgrounds, experiences, and societal influences. Millennials (those born between 1981-1996) and Generation Z (those born between 1997-2012) are “digital natives” who grew up with the presence of digital technology or in the information age. These two generations value career growth and experience over job security. Millennials and Generation Z will make up most of the workforce by 2030.

Baby Boomers (born between 1946-1964) and Generation X (born between 1965-1980) are extending their careers, remaining engaged, and making valuable contributions to the organization. As a result, the future workforce will boast at least four generations – each functioning from different backgrounds, experiences, and societal influences. The agency will need to understand what differentiates the generations (e.g., sources of motivation, working style preferences, and career expectations), as well as what unites them (e.g., clear purpose and alignment to the mission and a flexible work environment) to effectively manage the future workforce.

To be highly effective, our employees will need to be proactive, forward-thinking, and unrestrained by siloed information and infrastructure. While some skills and job knowledge will remain component specific (e.g., programmatic knowledge), we can use employees’ transferrable knowledge and skills for projects and initiatives, making the workforce more agile. Teams can collaborate across geographical boundaries. Expertise will be more easily accessible across the agency. As a result, the management of people will transcend traditional direct-line supervision to a broader, shared leadership framework.

Anticipated Workplace Changes

Technology will transform the way we work. Organizations (and workers) will need to plan for shifts in occupations and increased job growth among high-skill jobs. The adoption of digital technologies, including automation and artificial intelligence, has changed the way organizations use technology and may continue to transform how the workforce is organized. The hybrid workplace will be a reality for most organizations, including SSA. The competencies necessary for success will change, including an emphasis on the “knowledge worker,” where changes in service delivery and automation will create a need for higher-order expertise.

To prepare for the future workforce, we will address three focus areas in our human capital strategy: Recruitment and Hiring, Employee Engagement, and Employee Development.

Goal 1: Transform SSA into an Employer of Choice

Our Challenge: Pandemic-related challenges, including staffing losses due to the unprecedented Great Resignation and agency reentry to workplaces, have had a cumulative effect on our agency. In FY 2022, we experienced our lowest staffing levels in more than 25 years (see Figure 3). Beginning in FY 2019, voluntary/non-retirement separations (e.g., transfer, resignation) exceeded the number of retirement separations, and they comprised a greater percentage of the total number of separations. Our separations are concentrated in lower-graded, entry-level, direct service positions, particularly among new hires. Our exit survey respondents leaving the agency for other private sector or government jobs have most frequently cited securing positions with higher pay as their reason for separating. Following pay, the most referenced reason for leaving is feeling overworked.

Our Two-Year New Hire Retention rate has fallen steadily over time from 84 percent in FY 2014 to just 61 percent in FY 2023. We are consistently unable to compete with the workplace flexibilities of other similar agencies (e.g., Internal Revenue Service, Veterans Affairs) effectively due to our direct service structure and the pay and flexibilities of the private sector. Competition for entry-level talent since the COVID-19 pandemic has been particularly difficult since the private sector is adjusting to market demands and high inflation by raising wages. Because our services require in-person support, we must compete in local job markets to have staff onsite in our field offices. In major metropolitan areas, it can be extremely difficult for us to compete, particularly for entry-level hires when the job market is tight.

Due to hiring limitations and increased attrition over the past several years, we face potential generational gaps, which will affect our ability to maintain a generationally diverse workforce. Despite our best efforts to hire aggressively and make gains in our staffing levels, we often find that those gains are short-lived. It is difficult to retain the latest generation in our workforce because they often have multiple employment options in today's job market. In addition, with fluctuating annual budgets, we often go from a hiring surge into a hiring freeze where normal attrition eats away at our staffing gains to a point where staff workloads become overwhelming, and pressure builds on our workforce. We need sufficient, sustained funding over a multi-year cycle for our hiring gains to be effective and rebuild a sustainable workforce.

We recognize that our current workforce size and separation trends are not sustainable, challenging our ability to meet current or future service delivery needs. To address these challenges, we are focused on transforming our agency into an Employer of Choice by restructuring and modernizing our approach to hiring and recruitment.

Strategic Objective 1.1: Strengthen SSA’s Recruitment and Hiring Infrastructure

Strategic Initiative 1.1.1: Increase HR Capacity

Focus: *We will expand our HR staff structure to maintain average hiring workloads and leverage temporary staffing options to allow flexibility in addressing hiring surges.*

If we receive our FY 2025 President’s Budget request, we plan to restore staffing to FY 2023 levels to meet our current and future service delivery needs. This will require HR staffing support to handle the increased workloads. We are reimagining the HR organization by uniting the best features of the agency’s 13 different HR offices, including all 10 regions, the Office of Central Operations, the Office of Hearings Operations, and Headquarters. Centralizing our HR offices will enable us to take an agile approach to hiring by quickly identifying and maximizing our resources and shifting capacity to support agency priorities. Centralization will also enhance oversight and governance, gain efficiencies and increase standardization, balance distribution of workloads, and reduce redundancies and organizational layers in accordance with the [FWPR](#) (See [Appendix A](#)).

Our Office of Human Resources will leverage contractor support, establish new interagency agreements, and leverage rehired annuitants and detailees to support increased hiring and related activities. In FY 2022 we obtained OPM’s approval for Direct Hire Authority (DHA) through spring of FY 2025 to aid in our hiring efforts for mission-critical positions. This authority has helped accelerate the hiring process and expand our outreach to diverse populations. We have instituted a Talent Team to focus on increasing our use of candidate assessment options, which will serve to strengthen and improve our qualified candidate pools.

We plan to achieve the below milestones to increase our HR capacity:

Key Milestones	Due Date
Leverage contractor support, as appropriate (<i>Budget Dependent</i>).	FY 2023, Q2 through FY 2025, Q2
Establish new interagency agreements.	FY 2023, Q2 through FY 2026, Q4
Leverage rehired annuitants and detailees (<i>Budget Dependent</i>).	FY 2024, Q1 through FY 2026, Q4

Strategic Initiative 1.1.2: Modernize the Agency's Recruitment Program

Focus: We will leverage new recruitment tools, resources, and relationships to reinvigorate the SSA brand and outreach to a diverse population of new recruits.

We plan to promote our organization as an employer of choice and modernize our recruitment tools to attract new recruits and build a pipeline for early career talent. In FY 2023, we updated our external [Careers web page](#) to provide potential applicants more information about available positions and authorities when seeking employment. We also contracted with a private vendor, whose online platform reaches over 90 percent of U.S. colleges and universities, to expand our marketing towards students and improve our outreach towards a broader range of institutions. In addition, we developed a Veteran New Hires Intranet site, which provides information and resources to support the orientation and onboarding of veterans.

We will promote our agency as an employer that makes a difference in people's lives, while also providing competitive employee benefits and flexibilities that support work-life balance. We plan to use OPM special hiring authorities (e.g., Schedule A, Pathways, Military Spouse) and maximize use of OPM's FY 2023 DHA approval to fill certain mission-critical positions. We are planning for our options after our temporary DHA ends in March 2025. We will leverage partnerships with universities and institutions that specifically work with underserved communities in our recruitment efforts.

While in place, DHA has allowed us to diversify our recruitment, including enhanced outreach to Historically Black Colleges and Universities (HBCU) and Tribal Colleges and Universities. With DHA, we identified local candidates interested in positions that are difficult to fill due to highly specialized programmatic knowledge requirements. Additionally, obtaining DHA for many of our critical positions allows managers to recruit people who understand our work and are interested in our public service careers. In accordance with the [PMA](#), and in support of [Executive Order 14035: DEIA in the Federal Workforce](#), we currently utilize candidate assessment tools to screen and target HBCUs, Tribal Colleges and Universities, and Institutions Serving Students of Color (ISSC).

In support of the [PMA](#), and in accordance with [Executive Order 13473: Advancing Economic Security for Military and Veteran Spouses, Military Caregivers, and Survivors](#), we participate in the White House's Joining Forces Interagency Policy Committee and developed an agency workgroup in support of these efforts. Our workgroup will spearhead development of a comprehensive agency-wide plan for hiring military and veteran spouses, caregivers, and survivors. We will leverage the special hiring authorities for non-competitive appointments of military spouses and participate in the Department of Defense's Spouse Education and Career Opportunities Program. We will also use the Military Spouse Employment Partnership portal for recruitment. Within the next few years, we will increase our workforce representation of military spouses through improved communication and targeted recruitment efforts. We are exploring ways to increase outreach to the military community and drive greater awareness of the military spouses hiring authority among our managers. We will encourage our field offices to collaborate with local military installations in support of our outreach efforts. We will also partner with our Veterans and Military Affairs Advisory

Council to conduct voluntary listening sessions with our current military spouses to gain greater insight into how we can provide greater support to their community.

We will implement strategies, policies, and practices to maintain a representative workforce that reflects the diversity of our customers, and continue to promote diversity, equity, inclusion, and accessibility in hiring and advancement. We will address potential barriers in the hiring and recruitment pipeline by reviewing applicant flow data.

Key Milestones	Due Date
Modernize external recruitment website.	FY 2025, Q1
Expand recruitment partnerships with HBCUs and ISSCs.	FY 2024, Q1 through FY 2026, Q4
Conduct military spouse listening sessions.	FY 2024, Q1 through FY 2026, Q4
Expand internship opportunities.	FY 2024, Q1 through FY 2026, Q4

Strategic Initiative 1.1.3: Restructure Hiring and Onboarding Processes

Focus: *We will adjust our budget, hiring, and onboarding approach to meet “just-in-time” staffing needs and reduce time to hire timeframes.*

Customarily, our budget allocations for new hires are released in the second half of the FY. Delaying funding for new hires results in a surplus of vacant positions, overworked staff, lower levels of engagement, and reduced service levels. We will request the funding level necessary to support hiring throughout the year, especially for direct service positions, to avoid overloading our present staff.

Additionally, our onboarding process is disjointed, and lacks focus on the mission, vision, and culture of the organization. We developed a mission-based orientation process for the first year of employment to create a connection to the organizational culture with an emphasis on engagement, morale, and inclusiveness. To ensure we further support employees at onboarding, we will continue to provide relevant training and mentoring for new hires, as appropriate. In addition, we are looking to improve the employee training experience by obtaining survey input from new hires concerning how to best leverage hybrid technology tools while balancing the right mix of peer-to-peer interaction to support entry-level training. This aligns with the [FWPR](#) (See [Appendix A](#)).

We propose the following milestones to adjust our budget, hiring, and onboarding approach.

Key Milestones	Due Date
Develop streamlined onboarding process and communications across all involved components (Budget Dependent)	FY 2023, Q3 through FY 2026, Q4
Identify onboarding gaps by reviewing survey results and conducting new surveys with new joiners	FY 2025, Q2
Establish an Employee Experience workgroup to evaluate and improve the onboarding experience, including communications and processes	FY 2025, Q2

Strategic Objective 1.2: Leverage Available and New Flexibilities and Incentives

Strategic Initiative 1.2.1: Expand and Leverage Hiring and Compensation Flexibilities

Focus: *We will enhance our competitive advantage for acquiring new recruits by streamlining hiring and pursuing pay equity with public and private competitors.*

Our recent analysis of survey responses revealed that many of our employees are leaving the agency for higher pay rates. We plan to enhance our competitive advantage by pursuing additional hiring and pay flexibilities. In FY 2023, we explored the feasibility of using certain employee monetary incentives, such as special salary rates; but ultimately, we determined that it is not feasible to adopt such incentives due to budget constraints. Despite our limitations, we will continue to explore hiring flexibilities that will help us identify prospective hires faster in a competitive talent market.

Key Milestones	Due Date
Request and obtain approval to utilize DHA for hard-to-fill positions.	FY 2023 Q1 through Q4 (<i>Completed</i>)
Utilize DHA for hard-to-fill positions (<i>Budget Dependent</i>).	FY 2023 through FY 2025 Q2
Continue to pursue additional hiring flexibilities to attract diverse talent across the country.	FY 2023 Q1 through FY 2026 Q4

Strategic Initiative 1.2.2: Explore and Market Employee Retention Incentives

Focus: *We will address employee interest in benefit programs through research, marketing, and policy guidance.*

In FY 2023, we explored the feasibility of using group incentives, such as special salary rates, to attract and retain staff for our hard to fill positions. Unfortunately, due to budgetary constraints, we determined that it is not feasible to pursue special salary rates or move forward with a more robust internship program at this time. We considered critical positions that require unique qualifications or highly specialized skills. In addition, we researched and benchmarked the applicability of offering student loan debt forgiveness. We are well positioned to market this incentive when a national policy is implemented for Federal agencies.

We prioritize our service to the public, which means we need to make difficult decisions about how we use our resources. However, we remain equally committed to researching and benchmarking less cost-restrictive incentives to support our retention efforts.

We will also continue to market the benefits of Federal total compensation including benefits, awards, leave, retirement, the Public Service Student Loan Forgiveness program, and other incentives employees may receive as part of a rewarding work environment to prospective applicants, as appropriate.

Key Milestones	Due Date
Market the benefits of Federal total compensation to prospective applicants.	FY 2024, Q1 through FY 2026, Q4
Explore additional workplace flexibilities (e.g., remote work) to attract talent from across the country.	FY 2024, Q1 through FY 2026, Q4

Strategic Objective 1.3: Implement a Strategic Hiring Strategy

Strategic Initiative 1.3.1: Mature Workforce Analysis and Planning Products

Focus: *We will expand our workforce data analysis program to include comprehensive and diverse workforce analyses, including descriptive, exploratory, predictive, and prescriptive strategies.*

We will use our workforce data analytics to drive change and make recommendations to build a workforce that can execute on our mission and strategic goals successfully. We plan to implement a business intelligence system that will allow automated reporting of data from a variety of sources so our staff can focus on analysis and visualization, rather than data collection.

Key Milestones	Due Date
Conduct analyses covering the full employee lifecycle (e.g., hiring, attrition, retention, representation, engagement, labor market).	FY 2024, Q4 through FY 2026, Q4
Develop a new, modern attrition projection methodology.	FY 2023, Q4 (<i>Completed</i>)

Strategic Initiative 1.3.2: Leverage Workforce and Labor Market Data to Inform Hiring and Retention

Focus: *We will utilize environmental and organizational assessments to inform hiring plans, including positions, locations, and targets.*

We are committed to improving our job postings with clearer job descriptions, and work experience and degree requirements. We will leverage geographic locations where positions and salary are competitive to help mitigate challenges in the labor market. Budget allocations and anticipated attrition will influence our priority hiring areas.

We will utilize our new Workforce Projection Model (WPM) to inform hiring decisions and adjust for anticipated changes to the workforce based on projected attrition. This tool will help increase efficiencies and standardize workforce planning.

The WPM is based on the demographic method of cohort component projection, which is commonly used in the fields of demography and actuarial science to predict future population sizes, compositions, and distributions. The model uses a static or period life table and applies

age-specific retention ratios, hire, separation, and migration (i.e., internal moves) rates to a benchmark data population to project future cohorts of employees.

The WPM generates projections at single-year intervals for hires, separations, internal movements, and workforce totals separately. Agency executives can use results from the model to answer workforce questions like, “How many employees can I expect to have left if I don’t hire any new people over the next two years?” and “How many people do I need to hire next year to prevent a net loss to my component?” to modify hiring and retention strategies.

HRStat is a strategic human capital performance evaluation process that identifies, measures, and analyzes human capital data to inform the impact of our human capital management on organizational results with the intent to improve human capital outcomes. We have elevated our HRStat program to a higher-level oversight and increased meeting frequency by the Office of the Commissioner (OC). Through bi-weekly, Commissioner-led SecurityStat meetings, we have increased the frequency of data-driven executive discussions about workforce-related issues to measure performance and identify and implement solutions. This approach has allowed us to garner real-time concurrence and direction based on the data and identify leading actions to achieve our strategic goals. The data-driven decisions from the agency executives are key to our strategic planning and evaluation process.

Key Milestones	Due Date
Enhance HRStat to drive data-driven decisions and outcomes (actual and projected).	FY 2024, Q1 through FY 2026, Q4
Authorize targeted hiring for specific positions with high attrition (actual and projected) (Budget Dependent).	FY 2024, Q1 through FY 2026, Q4
Identify hiring targets based on budgeted allocations and anticipated attrition.	FY 2024, Q1 through FY 2026, Q4

Strategic Initiative 1.3.3: Provide Support to Hiring Managers

Focus: We will increase hiring manager knowledge of hiring processes, tools, flexibilities, and incentives through “just-in-time” agency-wide training, guidance, and resources.

Hiring managers are actively supporting the sustainability of their workforce throughout the year, including opportunities to hire externally as well as internal movement such as lateral assignments and promotional opportunities. In all cases, they need to be well versed on all facets of the hiring process, including job analyses, posting vacancies, and interviewing. We will improve our competitive hiring process by engaging our hiring managers early in our recruitment process. We will empower our hiring managers to work with our HR professionals while developing hiring policies and practices that will help us meet our current and future talent needs. We will help our hiring managers shift from self-rated questionnaires to skills-based assessments. We will coach hiring

managers on how to integrate values-based questions into their interview and assessment processes. We will host listening sessions to facilitate communication between our talent teams and hiring managers. We will offer workshops on subjects such as structured interviewing techniques and unconscious bias.

Key Milestones	Due Date
Conduct recruitment and hiring refresher training for component hiring officials.	FY 2024, Q2 through FY 2026, Q4
Provide hiring and recruitment guidance to hiring officials.	FY 2024, Q1 through FY 2026, Q4

Goal 2: Improve Workplace Conditions to Drive Engagement

Our Challenge: Our employee engagement FEVS scores have stagnated and trended lower than our government peers for the last four consecutive years. Our employees report burnout and inability to manage increased workloads as major concerns. Our employees feel overworked, overwhelmed, and exhausted. In FYs 2017–2021, we averaged roughly 4,400 yearly separations, with an average separation or attrition rate of seven percent. In FY 2023, separations accounted for 8 percent of our workforce, with nearly 4,700 employees leaving. In FY 2023, our Exit Survey respondents leaving the agency for private sector or government jobs most frequently cited feeling overworked as one of their top reasons for leaving the agency. See [Appendix D](#) for more separations data.

Creating a healthy workplace culture is a crucial driver of employee engagement and retention. Employees will continue to question the impact of their work on their overall well-being, and this will impact performance, morale, and attrition. Increasing the promotion of our Work-Life Services will ensure that employees have access to health and wellness resource topics such as stress management, health, and nutrition.

Our employees also report that they feel the recognition they receive is not meaningful and does not highlight differences in performance. Our employees continue to express dissatisfaction with their lack of involvement in decisions that directly affect their work. Employees feel devalued and less committed to the outcome when they are excluded from the decision-making process.

Lastly, our employees report that they are not satisfied with the information they receive from management about their organization. Employees would like to receive more information about agency priorities and advanced notification when those priorities change. They also would like to be involved in decisions that affect their work, where possible. Minimal and ineffective communications lead to gossip, disengagement, and a negative view of the organization. We are focused on improving workplace conditions to drive engagement to address our employees’ perceptions.

Strategic Objective 2.1: Prioritize Employees' Health and Well-Being

Strategic Initiative 2.1.1: Deploy Health and Wellness Campaign

Focus: *We will prioritize employee well-being by developing and marketing new and existing work-life resources to address mental health and wellness.*

We will prioritize employee well-being by developing and marketing new and existing work-life resources to address mental health and wellness. Promoting employee health and well-being resources through a broad marketing campaign encourages our employees to utilize our programs and new support resources, such as our mental health workshops, free fitness center memberships to all employees with access to our onsite fitness centers, and virtual fitness services. This initiative aligns with the [PMA](#) regarding identifying practices that support employee mental health and well-being. This also aligns with the [FWPR](#) and supports the [HCF](#), which promotes sustainable work-life balance practices.

Key Milestones	Due Date
Increase marketing of existing work-life resources.	FY 2024, Q1 through FY 2026, Q4
Conduct mental health and wellness workshops.	FY 2024, Q1 through FY 2026, Q4
Develop health and well-being tutorials.	FY 2024, Q1 through FY 2026, Q4

Strategic Initiative 2.1.2: Expand Workload and Stress Mitigation Strategies

Focus: We will address employee burn-out and stress by providing guidance, tools, and training to better manage workloads, leverage technology to reduce manual processes, and encourage employees to achieve a work-life balance.

Our 2023 FEVS results revealed that only 44 percent of respondents agree that their workloads are reasonable, compared to the government-wide response of 62 percent. Heavy workloads and tight deadlines contribute to employee stress and anxiety in the workplace. A stressed workforce has detrimental effects on the organization. Many employees lose their motivation and have a difficult time completing work tasks.

Creating a healthy workplace culture is a crucial driver of employee engagement and retention. Absent such a culture, employees will continue to question the impact of their work on their overall well-being, and this will continue to drive resignations. A healthy workplace culture improves productivity and reduces burnout. On a personal level, highlighting the importance of wellness shows our employees that we are committed to supporting them. This comes in many forms, such as providing resources on work-life integration, providing strategies and resources to manage stress and support mental health, and leveraging existing and new technologies to reduce manual tasks. These activities align with the [FWPR](#) (See [Appendix A](#)).

Key Milestones	Due Date
Develop employee engagement marketing plan.	FY 2024, Q1 through FY 2025, Q4
Issue new employee retention and workload resources.	FY 2023, Q3 through FY 2026, Q4
Leverage technology to improve workforce efficiency.	FY 2023, Q1 through FY 2026, Q4

Strategic Objective 2.2: Promote a Culture that Recognizes and Rewards Employee Contributions

Strategic Initiative 2.2.1: Improve Employee Recognition Program

Focus: *We will encourage greater employee recognition through emphasizing the importance of both formal and informal awards from both supervisors and peers.*

We know that our employees are our greatest asset. According to our 2023 FEVS results, 47 percent of respondents agree that they are satisfied with the recognition they receive for doing a good job, compared to the government-wide response of 56 percent. The simple act of acknowledging exemplary duty performance can increase employee morale. When employees are recognized, it connects them to the agency and its mission, elevates performance, and increases the likelihood they will stay.

Recognition is an ongoing, natural part of day-to-day experience. There are many ways to acknowledge employee contributions and good performance, from providing a sincere “Thank You!” for a specific job well done to more formal cash incentive and recognition awards programs.

We will build a culture of employee praise and recognition across the components by providing employee recognition resources and best practices for our managers and supervisors while encouraging more frequent, timely, and informal recognition and acknowledgment of employee and group contributions, such as peer-to-peer awards. These activities align with the [FWPR](#) (See [Appendix A](#)).

Key Milestones	Due Date
Develop and release an Employee Recognition Toolkit.	FY 2024, Q1 through FY 2025, Q4 (Completed)
Promote informal and formal recognition strategies.	FY 2023, Q1 through FY 2026, Q4

Strategic Initiative 2.2.2: Increase Manager Support and Accountability

Focus: *We will provide training and support to managers to foster greater employee engagement agency wide.*

Improving employee engagement is featured prominently in the [PMA](#) success metrics. Research reflects that the direct supervisor-employee relationship has a substantial effect on employee engagement and satisfaction. To this end, in FY 2023, we added the following expectation to the Performance Assessment and Communication System performance plans for all managers and supervisors:

“Promotes a highly engaged workforce through employee development, two-way communication, and informal and formal recognition of contributions. Involves employees in the identification and resolution of workplace challenges, and actively supports leadership efforts to create a culture of engagement.”

Investing in our employees and building an inclusive, engaged, and empowered workforce is a mission-critical priority; a better employee experience positions our staff to deliver a better customer experience to our customers – the public. Our agency’s Improving Workforce Morale (IWM) plan serves as a roadmap for agency-wide change and improvement in the areas of employee morale, recruitment, and retention. This plan provides a high-level framework for our components to develop more tailored plans. Deputy Commissioner (DC)-level components also developed component specific IWM plans addressing employee engagement, morale, and communication challenges and provided our Office of Human Resources with bi-annual status reports. We implemented the Agency-wide IWM plan for FYs 2024 – 2025 and each DC-level component implemented component-specific plans for FYs 2024-2025 based on data and employee feedback.

Our Executive Champion Program affords our Senior Executive Service members opportunities to serve as ambassadors for Advisory Councils, employee resource/affinity groups, to give visibility and voice to council objectives, promote diversity awareness, and champion inclusion.

Finally, to promote an inclusive and engaged workforce, and support employees from all backgrounds to participate to their fullest in support of our mission, it is imperative that our supervisors and managers are properly trained and supported. We will provide our supervisors and managers with the tools and resources they need to enhance their skills and competencies, optimize organizational performance, address current and future workforce needs, accommodate qualified applicants and employees with disabilities, and attract the talent we need to achieve our business goals.

Key Milestones	Due Date
Incorporate employee engagement expectations into manager performance plans.	FY 2023, Q1 <i>(Completed)</i>
Establish an executive-level Employee Engagement Community of Practice.	FY 2023, Q1 <i>(Completed)</i>
Increase soft skills training for supervisors and managers.	FY 2024, Q1 <i>(Completed)</i>
Provide Reasonable Accommodation training and resources.	FY 2024, Q1 through FY 2026, Q4
Implement policy enhancements to improve the Reasonable Accommodation decision-making process	FY 2024, Q4
Implement and maintain IWM plans.	FY 2024, Q1 through FY 2026, Q4

Strategic Objective 2.3:

Improve Workplace Communications and Employee Involvement

Strategic Initiative 2.3.1: Increase and Improve Agency-Wide Communications

Focus: *We will enhance communication from senior leaders at all levels throughout the agency to keep employees informed and foster their inclusion in the decision-making process.*

Effective communication in the workplace ensures everyone understands their duties and responsibilities, helps build quality relationships, and keeps employees engaged and productive. According to our 2023 FEVS results, just 48 percent of SSA respondents agreed they were satisfied with the information they receive from management on what is going on in the organization, compared to the government-wide response of 55 percent. Employees appreciate transparency and honesty in the workplace. Minimal or ineffective communication leads to disengagement and a negative view of the organization.

As a large agency, more than 75 percent of our employees perform varied front-line responsibilities to serve the public directly through a network of more than 1,200 community-based field offices nationwide. Our structure can create challenges with timely and consistent dissemination of information, which can erode trust between management and employees.

We are reexamining our communication practices to best serve the dynamics of our organization. Feedback from employees indicates a particular need for enhanced communications from senior leadership. To address this issue, we have established a new and recurring digital news program that shares human-interest stories, employee testimonials, and expert insights, in addition to agency news and updates. We also established a new audio series for employees and the public to hear directly from SSA senior leaders about our top priorities and how they impact service. Finally, we plan to broaden communication through townhall meetings with senior executives, supervisors, managers, and all employees to solicit thoughts and recommendations on new ideas to foster and improve engagement across the agency. These activities align with the [PMA](#) and [ASP](#).

Key Milestones	Due Date
Increase the frequency of meaningful senior level communications to employees.	FY 2024, Q1 through FY 2026, Q4
Leverage digital and video news platforms to feature human-interest stories and news on agency initiatives and priorities.	FY 2023, Q2 through FY 2026, Q4

Conduct townhalls with senior executives and all employees.

FY 2024, Q1 through FY 2026, Q4

Strategic Initiative 2.3.2: Promote Collaborative Decision-Making

Focus: *SSA will promote a culture of inclusivity by encouraging managers to engage employees in decision-making where feasible, particularly when there is an impact to employees' workloads.*

Inclusive decision-making is one of the most effective ways to engage employees and encourage high performance and innovation. Involving employees in important decisions will also have a positive effect on their sense of belonging, leading to an increased engagement and retention.

According to our 2023 FEVS results, 40 percent of SSA respondents indicated they were satisfied with their level of involvement in decisions that affect their work, compared to the government-wide response of 53 percent. Employees who do not feel heard are more likely to disengage. Employee feedback surveys are a great way to promote communication and transparency. We will use employee survey feedback to identify new programs and enhance existing ones to meet employee needs.

The agency and component-level IWM plans address employee feedback noted in FEVS results, internal pulse surveys, and other formal and informal channels. We will provide our managers with strategies and resources they can use to increase their employee's level of involvement in the decision-making process. Finally, we will offer a collaborative framework and forum for SSA managers and supervisors to share best practices and provide feedback on agency-level employee engagement activities by establishing a Community of Practice. These activities align with the [ASP's](#) focus on our workforce.

Key Milestones	Due Date
Utilize survey data to inform employee experience initiatives.	FY 2023, Q1 through FY 2026, Q4
Develop and release inclusive decision-making resources for managers.	FY 2023, Q2 (<i>Completed</i>)
Establish an employee engagement Community of Practice for supervisors and managers.	FY 2024, Q3 through FY 2026, Q4

Goal 3: Invest in Learning and Development

Our Challenges: Staff attrition has led to a loss of institutional knowledge across our agency, with significant impact among our mission-critical occupations (MCO). Further, the lack of knowledge transfer processes or practices limits our ability to mitigate the impact of the loss of seasoned employees on available technical expertise. Failure to retain and transfer institutional knowledge may result in increased staff turnover and further loss of knowledge, translating into higher costs and potential degradation of customer service.

Non-retirement separations (e.g., resignation, transfers) exceeded retirements in FY 2022. Increasingly, our employees are pursuing career development and growth opportunities in other Federal agencies or private organizations. It is imperative that we continue to offer opportunities to grow and advance our employees in order to compete with our Federal counterparts and private organizations.

Heavy workloads can discourage employees from training and supervisors from granting permission. Most employees are interested in honing their skills and abilities for improved job performance; however, employees do not believe they have the time to participate in training and keep up with their increased workloads.

Strategic Objective 3.1: Support Enterprise-Wide Training and Knowledge Transfer Initiatives

Enterprise-wide training affords our employees access to learning content and development resources for performance. Communicating information about training products and services promotes continual learning, which engages and empowers our employees to take an active role in their training and development.

Enterprise-wide training aligns with the [PMA](#) priority to strengthen and empower the workforce by providing employees with opportunities to learn and grow. In addition, our training efforts support our [ASP](#) objective to support employees' chosen career path by supporting their efforts to create fulfilling careers and aligns with both the [FWPR](#) and [HCF](#) (See [Appendix A](#)).

Knowledge transfer preserves employee knowledge, which enables us to maintain a repository of job-related information and conserves institutional knowledge. We are developing a process to capture valuable knowledge and insights of current employees and convey them to new and retained employees. Developing a process to share job knowledge endorses a culture of learning that increases employee engagement. Our knowledge transfer efforts align with the [FWPR](#) (See [Appendix A](#)).

Strategic Initiative 3.1.1: Develop and Retain Institutional Knowledge

Focus: *We will commit to and invest in the ongoing training and development of our employees through employee collaboration, knowledge sharing, and knowledge transfer.*

We will develop and retain institutional knowledge by benchmarking and exploring techniques and tools, such as communities of practices, knowledge portals, and platforms to preserve, store, and transmit job knowledge that employees need to perform their job duties. We are using M365 as our primary knowledge transfer platform. We are exploring available features and will train employees throughout the agency on how to use Microsoft Teams for virtual collaboration, ongoing communication, exchange of documentation, and storage of information. Establishing tools and creating opportunities for collaboration will foster a climate of continuous learning and improvement

When we promote a culture of learning, professional recognition, and personal development, we create an engaging environment where employees can develop and grow. We plan to expand competence, experience, and credibility in specific areas of expertise through employee collaboration, knowledge sharing, and knowledge transfer. Training programs effectively transfer knowledge to employees allowing them to acquire new information to enhance their personal and professional development.

We will continue to develop continuing education that supports the mission of the agency in partnership with our key stakeholders and subject matter experts. This includes recurring training that covers updates on policy and procedures for frontline employees in our field offices, teleservice centers, as well as staff who decide disability determinations. The training that we develop will assist in processing claims, making disability determinations, continuing medical education, administrative law judge education, and new systems updates.

Key Milestones	Due Date
Identify and market knowledge transfer tools and techniques.	FY 2024, Q1 through FY 2026, Q4
Launch new training and development opportunities.	FY 2024, Q1
Increase awareness of Microsoft 365 collaboration tools	FY 2024, Q1 through FY 2026, Q4

Strategic Initiative 3.1.2: Assess Competency and Skill Gaps

Focus: *We will utilize competency-based assessments to identify skills gaps and develop comprehensive gap mitigation strategies to improve proficiency, particularly within our MCOs.*

Historically, SSA has struggled with a comprehensive strategy to address competencies and with recruiting and retaining various MCOs (e.g., 105-Social Insurance Specialists, 962-Customer Service/ Teleservice Representatives, 901-Legal Administrative Specialists).

In FY 2023, we partnered with a nonprofit independent organization to conduct an inaugural enterprise-wide assessment for identifying employee skill gaps across core and leadership competencies. In collaboration with our executive workforce planning governance structure, we leveraged the results to identify and prioritize the following most significant competency gaps that warrant immediate intervention:

- **Agency-wide Employees:** Privacy and Personal Information Stewardship & Customer Service and Public Service Motivation;
- **GS-01–GS-11 Employees:** Problem Solving;
- **GS-12–GS-13 Employees:** Developing Others and Political Savvy;
- **GS-14–GS-15 Employees:** Strategic Thinking, Political Savvy, Creativity/Innovation, and Entrepreneurship; and
- **Management/ Pipeline:** Human Capital and Financial Management.

We will use the best practices garnered from the assessment to identify skill gaps, develop competency models, invest in targeted training and other gap mitigation strategies strategically, and create helpful resources. We will implement comprehensive strategies that reduce competency gaps and prepare our employees to achieve the agency’s mission, goals, and future objectives. Our efforts align with the Talent Management focus of the [HCF](#).

Key Milestones	Due Date
Conduct an agency-wide core and leadership competency assessment.	FY 2023, Q3 (<i>Completed</i>)
Implement a training plan to reduce leadership competency gaps.	FY 2025, Q4 through FY 2026, Q4
Validate the agency-wide list of mission-critical occupations (MCOs) to determine MCOs for competency gap mitigation.	FY 2024, Q4 through FY 2026, Q4
Conduct competency assessments on two MCOs (HR Specialist and Contracting Specialist)	FY 2024, Q1 through FY 2025, Q4

Strategic Objective 3.2:

Expand Employee Training and Development Programs and Participation

Expanding training and development opportunities inspires employees' professional growth. As our employees master new skills, they are empowered to seek professional opportunities to leverage their knowledge and skills. We recognize investing in job-related training is important; however, it is equally important to invest in time management, self-care, mental health, and nutrition and fitness. According to the Health Enhancement Research Organization, employee health is linked to higher productivity, better morale, engagement, and corporate success. Research confirms that a well-balanced employee is a healthier, happier, and more productive employee. Furthermore, when our employees know we care about them and their career trajectory, they remain committed to our organization. Increasing employee training and development through formal and informal learning and development activities aligns with the [HCF](#) (See [Appendix A](#)).

Strategic Initiative 3.2.1: Promote Innovative Training and Development Methods

Focus: We will promote and market innovative training and development opportunities to ensure we are meeting employee training needs while balancing changes in the work environment.

The need for leadership development is urgent. In today's uncertain and complex work environment, we need competent, skilled leaders. Leadership development programs are crucial to our long-term success. Over time, our traditional hierarchical structures develop into purposeful networks and communities of employees working together in a psychologically safe environment to achieve a shared purpose. The cumulative impact of these factors demands a new mindset and competencies that enable our leaders to make a positive difference.

In FY 2023, the SSA Mentoring Program (SMP) team created a revolutionary program to make flash mentoring accessible to all agency employees. The Virtual Micro Flash Mentoring Program uses a subject matter expert/mentor to deliver important information on a variety of topics to agency employees in less than 30 minutes. In FY 2023, we served over 5,000 employees via micro flash mentoring events (the final event was held on September 21, 2023). In FY 2022, when we held regular, two-hour flash mentoring sessions, we served approximately 200 agency employees. This is a 713% increase in employees participating in flash mentoring events when comparing FY 2022 and FY 2023 numbers.

Providing mentoring support aligns with the [FWPR](#), Growth Mindset, and the [ASP](#), by offering employees meaningful individualized feedback to guide their development.

We will deliver DEIA training to SSA Adjudicators to increase awareness of implicit and unconscious bias. We work with our Advisory Councils, which bring value by helping to build an inclusive environment and address diversity and inclusion in a holistic way. Advisory Councils provide a forum for members to share common interests, issues, or concerns as well as support personal and professional development in the workplace.

Key Milestones	Due Date
Partner with Advisory Councils to promote training and development activities.	FY 2024, Q1 through FY 2026, Q4
Deliver agency-wide training events focusing on reducing identified competency gaps	FY 2024, Q1 through FY 2026, Q4
Release DEIA Training for SSA Adjudicators	FY 2024, Q1 (<i>Completed</i>)

Strategic Initiative 3.2.2: Invest in Our Current and Future Leaders

Focus: We will invest in current and future leaders through modernized leadership development programs.

The cornerstone of any successful and thriving organization is good leadership. We must prepare our future leaders to adapt to changing demands. While some aspects of leadership, such as setting a vision and executing on strategy, will remain, our future leaders will need other skills to lead effectively. For example, future leaders will need to be open to new ideas, and value diversity in people and perspectives. We will expand the use of coaching services to facilitate employee growth, development, and success by creating a supportive, engaging work environment.

We embed leadership development in our agency at all levels of the organization to cultivate and retain skilled leaders. In FY 2019, we announced a modernized development program that encompassed three tracks of leadership development ranging from aspiring to executive-level development. We will announce another iteration of the National Leadership Development Program (NLDP) in FY 2024. The NLDP encompasses three tracks of leadership development and aligns with the [ASP](#) by expanding and maximizing leadership development opportunities to promote employee retention and strengthen succession planning.

We launched the NLDP Preparatory Series in April 2023. The NLDP Preparatory Series are readiness sessions designed to prepare interested employees for the NLDP application and assessment process. Our readiness sessions promote equitable access to information to all employees.

We will enhance the NLDP application and program structure by leveraging inter-governmental and contractual resources to assist with the program’s application and administration. Leveraging external resources lends industry credibility to our leadership development programs and enhances the programs by introducing new techniques and approaches to maximize program accessibility, inclusion, and equity.

We will emphasize the leadership philosophy, “*Lead by Serving*,” by developing and promoting a servant leadership training strategy. We will conduct servant leadership training to our current and aspiring leaders while encouraging them to be aware of the need for flexibility in their management style, which will accommodate individual employee needs. This approach will enhance our employee experience; and as a result, boost employee morale, engagement, and retention. Offering training to our agency leaders aligns with the [ASP](#) human capital goal to invest in training and support for managers.

Key Milestones	Due Date
Launch NLDP Preparatory Series.	FY 2023, Q3 (<i>Completed</i>)
Implement NLDP program improvements.	FY 2023, Q2 through FY 2024, Q1(<i>Completed</i>)
Launch NLDP	FY 2024, Q2 through FY 2026, Q4
Expand the use of executive coaching services.	FY 2025, Q2
Conduct servant leadership training for Senior Executive Service (SES) and GS-15s.	FY 2024, Q1 through FY 2025, Q4

Strategic Initiative 3.2.3: Increase Employee Development Opportunities

Focus: We will provide employees opportunities to develop additional skills, and experience job enrichment by participating in internal and external detail opportunities.

Career development plays a crucial role in employee satisfaction and engagement. When employees have clear growth pathways and opportunities for advancement, they feel valued and motivated to perform at their best. Through FEVS, pulse surveys, and exit surveys, our employees communicate that they want more career and growth opportunities.

In alignment with the [PMA](#), we will continue to provide employees opportunities to learn, grow, and thrive throughout their career. We will promote internal agency developmental opportunities and increase opportunities for our employees to participate in development programs external to our agency. External Development Programs (EDP) broaden our employees’ exposure to other public service organizations and increase opportunities for professional development. Such experience helps to strengthen individual competency and knowledge, which contributes to the overall growth and experience of our workforce.

We provide employees opportunities to obtain on-the-job work experience in a new area of work using Career Opportunity Training Agreements (COTA). COTA is a career development tool for employees seeking to obtain creditable experience to qualify for a new job series.

We are committed to investing in the development of our employees and ensuring they have options for on-the-job learning while balancing workload demands. We offer optional learning sessions that provide information on topics, such as health and wellness, time management, and personal development. In the past, we have offered these sessions during lunch and participation was voluntary. Moving forward, we will restructure and schedule our traditional “Lunch and Learn” sessions during non-peak work hours so our employees do not have to forfeit their personal time to participate. By restructuring these learning sessions, we will emphasize the importance of work-life balance and acknowledge that we value our employees’ personal time. This aligns with the [FWPR](#) (See [Appendix A](#)). With this change, we expect to increase voluntary participation in these sessions.

Key Milestones	Due Date
Increase utilization of EDPs.	FY 2024, Q1 through FY 2026, Q4
Expand the use of COTA or internal upskilling/reskilling programs	FY 2025, Q4

Our Implementation and Accountability

Performance Measures and Targets

FY 2023 Accomplishments

Implementation Considerations

Performance Measures and Targets

Our accountability framework strives to achieve balance between various forms of measurement. We established performance measures that demonstrate both outputs and outcomes. Outcomes are the identified results that we want to achieve. Outputs are the actions that we complete as part of achieving our outcomes. Where possible, we prioritized measures that are quantitative, easy to define, and allow recurring tracking and reporting.

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
1.1A Increase contractor and/or interagency support for HR workloads (Budget Dependent)	At least 1 new HR business line is supported by contractors or interagency agreement.	Met	At least 1 new HR business line is supported by contractors or interagency agreement.	At least 1 new HR business line is supported by contractors or interagency agreement.	TBD
	FY 2023 Performance				
	Target Met: We met our target in FY 2023 by partnering with a contractor (MITRE) to identify human capital barriers that exist in SSA's current strategic workforce planning capability. We have identified mitigation strategies to address these barriers. In addition, MITRE conducted an enterprise-wide assessment for identifying employee skill gaps across SSA's core and leadership competencies.				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
1.1B Expand use of digital platforms for recruitment (Budget Dependent)	Utilize at least 1 new digital platform.	Met	Utilize at least 2 new digital platforms.	Utilize at least 3 new digital platforms.	TBD
	FY 2023 Performance				
	Target Met: We met our target in FY 2023 by expanding our online and social media presence on popular online recruitment platforms. SSA secured a contract with Handshake, allowing us to connect with students from over 90% of US colleges and universities.				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
1.1C Increase diversity outreach to universities and institutions	Conduct recruitment outreach activities with at least 10 HBCUs or ISSCs.	Met	Conduct outreach activities with at least 15 HBCUs or ISSCs.	Conduct outreach activities with at least 20 HBCUs or ISSCs.	TBD
	FY 2023 Performance				
	Target Met: We met our target in FY 2023 by attending 56 recruitment events with HBCUs or ISSCs.				
1.1D Increase military spouse employees in the workforce (Budget Dependent)	Increase the number of overall military spouse employees in the workforce by 5%.	Met	Increase the number of military spouses in the SSA workforce to 175 (Dependent on ability to hire).	Increase the number of military spouses in the SSA workforce to 185 (Dependent on ability to hire).	TBD
	FY 2023 Performance				
	Target Met: We met our target in FY 2023 by increasing the number of military spouses in the workforce to 167 (increase from FY 2022 baseline of 135).				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
1.2A Increase new hire retention	Increase 1-year new hire retention rate by 1-percentage point from FY 2022 baseline.	Met	Increase 1-year new hire retention rate by 2-percentage points from FY 2022 baseline.	Retain at least 75% of FY 2024 hires for at least one year.	Retain at least 76% of FY 2025 hires for at least one year.
	FY 2023 Performance				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
	<p>Target Met: We met our target in FY 2023. Of the permanent employees hired in FY 2022, 72% remained on-duty for at least one year. This represents a 1- percentage point increase from the FY 2022 baseline (71%).</p>				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
1.3A Meet 100% of fiscal year budgeted hiring targets each year (Budget Dependent)	Increase our full time permanent (FTP) count by 5%.	Met	Meet 100% of fiscal year budgeted hiring target.	Meet 100% of fiscal year budgeted hiring target.	Meet 100% of fiscal year budgeted hiring target.
FY 2023 Performance					
<p>Target Met: We met our target for FY 2023 by increasing our FTP count by 3,095 over the FY 2022 baseline to 59,309, which equates to a 5.5% increase. We had 1-for-1 hiring for much of the FY in addition to being allowed to bring on approved FY 2022 hires that were not onboarded by the end of FY 2022.</p>					

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
1.3B Reduce overall agency separation rate	Reduce agency separation rate by 1 percentage point from FY 2022 baseline.	Met	Reduce agency separation rate by 2 percentage points from FY 2022 baseline.	Reduce agency separation rate by 3 percentage points from FY 2022 baseline.	TBD
FY 2023 Performance					
<p>Target Met: We met our target in FY 2023. As of the end of FY 2023, compared to the starting population at the beginning of the fiscal year, permanent employees separated at a rate of 8%. This represents a 2- percentage point decrease from the FY 2022 baseline (10%).</p>					

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
1.3C Increase issuance of hiring and workplace flexibilities guidance	Provide guidance or training at least 2 times annually for agency hiring officials.	Met	Provide guidance or training at least 3 times annually for agency hiring officials.	Provide guidance or training at least 3 times annually for agency hiring officials.	TBD
	FY 2023 Performance				
	Target Met: We met our target in FY 2023 by releasing guidance on Recruitment Best Practices and available hiring authorities to agency managers.				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
2.1A Increase leadership support of work-life programs	Increase FEVS score pertaining to Senior Leader support for work-life programs by 1-percentage point from FY 2022 baseline score.	Met	Increase FEVS score pertaining to Senior Leader support for work-life programs by 2-percentage points from FY 2022 baseline score.	Increase FEVS score pertaining to Senior Leader support for work-life programs by 3-percentage points from FY 2022 baseline score.	Increase FEVS score pertaining to Senior Leader support for work-life programs by 4-percentage points from FY 2022 baseline score.
	FY 2023 Performance				
	Target Met: We met our target in FY 2023. Per the 2023 FEVS results, 51% of respondents agreed that Senior Leaders demonstrate support of work-life programs. This represents a 2-percentage point increase from the FY 2022 baseline score (49%).				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
2.1B Increase employee access to work-life resources	Release at least 4 national communications to all employees promoting work life resources.	Met	Release at least 4 new management support resources.	Conduct at least 5 national health and wellness trainings, workshops, or information sharing sessions.	TBD
	FY 2023 Performance				
	<p>Target Met: We met our target in FY 2023 by developing and releasing six national communications to all employees promoting work-life, health, and wellness topics. This included information regarding SSA's flu vaccination program, physical fitness services, mental health awareness, financial literacy, suicide prevention and awareness, and services available through the Employee Assistance Program (EAP).</p>				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
2.2A Improve employee perceptions of how differences in performance are recognized	Increase FEVS score pertaining to differences in performance are recognized in a meaningful way by 1-percentage point from FY 2022 baseline score.	Met	Increase FEVS score pertaining to differences in performance are recognized in a meaningful way by 2-percentage points from FY 2022 baseline score.	Increase FEVS score pertaining to differences in performance are recognized in a meaningful way by 3-percentage points from FY 2022 baseline score.	Increase FEVS score pertaining to differences in performance are recognized in a meaningful way by 4-percentage points from FY 2022 baseline score.
	FY 2023 Performance				
	<p>Target Met: We met our target in FY 2023. Per the 2023 FEVS results, 34% of respondents agreed that in their work unit, differences in performance are recognized in a meaningful way. This represents a 2-percentage point increase from the FY 2022 baseline score (32%).</p>				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
2.2B Reduce the number of Reasonable Accommodation cases pending by 2% by FY 2025	Provide at least one training to more than 50% of the regional and component Reasonable Accommodation Coordinators.	Met	Reduce the number of cases pending by 1% from FY 2022 baseline through targeted support.	Reduce the number of cases pending by 2% from FY 2022 baseline through targeted support.	TBD
	FY 2023 Performance				
	Target Met: We met our target in FY 2023. In FY 2023, SSA held a Disability Awareness Summit. In addition, approximately 144 Reasonable Accommodation Coordinators were invited to participate in monthly informational training calls, with about 96 in attendance, constituting a 67% turnout.				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
2.3A Increase employee satisfaction with their direct supervisors	Achieve a FEVS score of 76 on the employee engagement supervisor subindex.	Not Met	Achieve a FEVS score of 75 on the employee engagement supervisor subindex.	Achieve a FEVS score of 76 on the employee engagement supervisor subindex.	TBD
	FY 2023 Performance				
	Target Met: We did not meet our FY 2023 target. Per the 2023 FEVS results, we achieved a score of 74 on the supervisor subindex. However, we offered a variety of employee engagement resources to supervisors. We updated the Employee Engagement Suite with new supervisory resource materials, offered supervisory and leadership training, and released a bi-monthly management minutes e-mail series.				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
2.3B Increase employee satisfaction with inclusive decision-making	Increase FEVS score pertaining to management involving employees in decisions that affect their work by 1-percentage point from FY 2022 baseline score.	Met	Increase FEVS score pertaining to management involving employees in decisions that affect their work by 2-percentage points from FY 2022 baseline score.	Increase FEVS score pertaining to management involving employees in decisions that affect their work by 3-percentage points from FY 2022 baseline score.	TBD
	FY 2023 Performance				
	<p>Target Met: We met our target in FY 2023. Per the 2023 FEVS results, 37% of respondents agreed that management involves employees in decisions that affect their work. This represents a 1-percentage point increase from the FY 2022 baseline score (36%).</p>				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
3.1A Improve employee satisfaction regarding opportunities to improve their skills	Increase FEVS score pertaining to employees are given real opportunities to improve their skills in the organization by 1- percentage point from FY 2022 baseline score.	Not Met	Increase FEVS score pertaining to employees are given real opportunities to improve their skills in the organization by 2- percentage points from FY 2022 baseline score.	Increase FEVS score pertaining to employees are given real opportunities to improve their skills in the organization by 2- percentage points from FY 2023 baseline score.	Increase FEVS score pertaining to employees are given real opportunities to improve their skills in the organization by 3- percentage points from FY 2023 baseline score.
	FY 2023 Performance				
	Target Met: We did not meet our target for FY 2023. Per the 2023 FEVS results, 55% of respondents agreed that employees are given real opportunities to improve their skills in the organization (no change from FY 2022 baseline score).				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
<p>3.1B</p> <p>Improve employee satisfaction regarding their job knowledge/skills</p>	<p>Increase FEVS score pertaining to whether employees have relevant job knowledge and skills necessary to accomplish organizational goals by 1-percentage point from FY 2022 baseline score.</p>	<p>Not Met</p>	<p>Increase FEVS score pertaining to employees having the relevant job knowledge and skills necessary to accomplish organizational goals by 2-percentage points from FY 2022 baseline score.</p>	<p>Increase FEVS score pertaining to employees having relevant job knowledge and skills necessary to accomplish organizational goals by 2-percentage points from FY 2023 baseline score.</p>	<p>Increase FEVS score pertaining to employees having relevant job knowledge and skills necessary to accomplish organizational goals by 3-percentage points from FY 2023 baseline score.</p>
	<p>FY 2023 Performance</p>				
	<p>Target Met: We did not meet our target for FY 2023. Per the 2023 FEVS results, 72% of respondents agreed that employees have relevant job knowledge and skills necessary to accomplish organizational goals. This represents a 1-percentage point decrease from the FY 2022 baseline score (73%).</p>				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
3.2A Collaborate with Advisory Councils to increase developmental opportunities for employees	Support Advisory Councils in promoting at least 1 training and developmental opportunity (e.g., joint training, membership drive).	Met	Support Advisory Councils in promoting at least 3 training and developmental opportunities (quarterly).	Support Advisory Councils in promoting at least 4 training and developmental opportunities (quarterly).	TBD
	FY 2023 Performance				
	Target Met: We met the target for FY 2023 by presenting career and leadership resources during the Joint Advisory Council Leadership Training Conference.				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
3.2B Increase SSA's Mentoring Program participation	Increase virtual flash mentoring participation by 50%.	Met	Increase virtual flash mentoring participation by 60%.	Increase virtual flash mentoring participation by 70% over FY 2022 baseline.	TBD
	FY 2023 Performance				
	Target Met: We met the target for FY 2023 by holding 18 flash mentoring sessions with 5,668 confirmed attendees. This represents a 713% increase from the FY 2022 participation.				

Fiscal Year Performance	2023 Target	2023 Results	2024 Target	2025 Target	2026 Target
3.2C Enhance the agency's national leadership and executive development program	Implement 50% of NLDP improvements based on program evaluation feedback.	Met	Attain a 90% OPM certification rate for eligible SES Candidate Development Program (CDP) participants.	Launch an SES CDP Preparatory Series.	TBD
	FY 2023 Performance				
	Target Met: We met the target for FY 2023 by implementing four of the six recommended NLDP improvements, based on program evaluation feedback.				

FY 2023 Accomplishments

Our leadership team collaboratively identified and implemented solutions that address current challenges and prepare us for the future. In FY 2023, we developed and implemented improvements to our workforce planning process and pursued new innovative solutions to support our workforce. Some notable accomplishments are listed below.

Planning Governance: We established a multi-level governance structure to lead our workforce planning efforts. This structure includes an executive-level WPGB led by our Deputy CHCO and comprised of the agency's Assistant Deputy Commissioners. The WPGB is supported by a staff-level, inter-component WPIT that conducts research and benchmarking to propose solutions for WPGB decision and prioritization. We leveraged the WPGB and WPIT to identify and prioritize the human capital challenges and initiatives reflected in this HCOP, conduct environmental scans, and analyze our workforce strengths, weaknesses, opportunities, and threats. The WPGB and WPIT ensured that the workforce planning process, including development of the HCOP, was inclusive and the perspectives of all SSA components were represented.

HRStat: We restructured our HRStat meetings to facilitate robust data-driven discussions for the purpose of making HR-related decisions for our current and future workforce.

Hiring/Recruitment: We obtained DHA in FY 2023 for certain mission-critical positions to address our urgent staffing needs and expedite hiring. As part of our recruitment efforts, we successfully expanded our marketing and outreach to students at U.S. colleges and universities by leveraging digital platforms such as Handshake and LinkedIn.

Onboarding: We signed a Memorandum of Understanding with OPM for the review of security and suitability forms for our state DDS hires. We have reduced the time for credentialing new DDS hires from 31 days in May 2022 to 18 days in May 2023, while increasing our number of DDS hires approved for new credentials from 136 in May 2022 to 325 in May 2023. We also expedited our credentialing of new hires by creating videos and instructional resources for onboarding employees and expanded online orientation on HR questions.

Competency Gap Analysis: We contracted with an independent firm who conducted a gap analysis of core and leadership competencies. We used the results to develop a strategy mitigating skill gaps through employee developed resources and training.

DEIA: In support of [Executive Order 14035: DEIA in the Federal Workforce](#), we accomplished the following:

- Implemented agency-wide pronoun use policy and practices on prohibiting discrimination, including harassment based on sexual orientation and gender identity;
- Provided DEIA training for employees, managers, and executives;
- Conducted a study of SSA's workforce by DEIA category, including workforce representation and projected changes to representation, trend data, and employee experience data;

- Conducted a comprehensive analysis of our NLDP application process to identify any barriers for underrepresented groups and areas for improvement to ensure equity in leadership development;
- Conducted a DEIA analysis of our national mentoring program and established a workgroup with key agency stakeholders to identify the ways and means for increased diversity of mentors in our national mentoring program; and
- Increased outreach and educational efforts to Tribal Communities through our Office of Native American Partnerships by conducting in-person and virtual seminars in nearly every State to improve access to and understanding of SSA programs. We worked to build and maintain relationships at the local level with the Public Affairs Specialists, and invited Tribal community members to SSA seminars and helped them create their own my Social Security accounts for access to services online. Tribal members received information on our retirement and disability programs, including our Wounded Warrior provisions, SSI, Medicare “Extra Help,” Medicare State Buy-in provisions, online services, and service delivery updates.

Employee Engagement

We used feedback from FEVS and new hire and exit surveys, to help develop and implement an IWM plan for the agency and each component. Based on our analysis, we instituted several workplace improvements to complement our hiring strategy. We accomplished the following:

- Increased our communications to keep employees informed of our priorities and challenges;
- Provided employees with the resources to help them navigate the hybrid work environment (e.g., Hybrid Workplace Toolkit) and manage work-life responsibilities (e.g., wellness resources);
- Increased career and professional development course offerings from 85 to 181 to help our employees take charge of their career goals;
- Launched the Management Minutes initiative that provides all agency managers and supervisors with a targeted series of tips, tools, and strategies to build and sustain an engaged workforce;
- Released a Manager Resources Guide that provides strategies and helpful links for agency managers to practice hands-on management, foster a positive work environment, and encourage employee involvement in engagement activities;
- Developed a Stay Interview Guide to prepare leaders to conduct discussions and learn the specific actions they can take to strengthen an employee’s engagement and retention; and
- Developed a workload prioritization tool to assist managers in prioritizing current and future workloads, and determine what workloads can be eliminated, initiated, continued, or enhanced based on the component’s strategic workforce plan and key priorities.

Implementation Considerations

Human capital management builds upon traditional models of HR while taking a more-strategic focus. Our foundational models of HR focus mostly on enforcement, compliance, and transactional activities, while effective human capital management includes planning, analysis, and evaluation. This approach emphasizes big-picture thinking. It champions results, not processes, and seeks to align HR decisions and investments with our mission, goals, and objectives.

Investment

We will invest resources in our workforce to ensure our employees have the capability and capacity to implement our strategy over the next five to 10 years. Tumultuous economic and political events, such as furloughs, government shutdowns, and years of continuing resolutions call for cautious investment strategies. Agencies across the government are under enormous pressure to reduce costs and increase savings. However, we must balance this obligation with our fiduciary duty to invest in employees as a strategic necessity. Especially in times of stringent budgetary constraints, it is essential to be innovative and forward thinking. We must meet the needs of the present without compromising our ability to meet the needs of future generations.

Shared Responsibility

While oversight of human capital management traditionally falls within the purview of HR offices, accountability for implementation of initiatives to manage our workforce is a shared responsibility of agency managers and employees. It is imperative that we maintain a standard of excellence in collaboration, consistency, and results as we implement this plan to meet the needs of the future workforce. Leadership must set the tone and stage for this standard. For our success, leaders at all levels must dedicate time, resources, and energy to make human capital management a part of our culture. We will develop complementary plans at the component levels to foster further adoption and implementation of the strategies and initiatives within this plan. Further component-level planning will provide leaders with the flexibility to solicit contributions from employees and implement strategies that are specific to the diverse challenges and needs of their respective workforces.

Appendices

Appendix A: Strategic Alignment

The table below illustrates alignment between our FYs 2024-2026 HCOP, [HCF](#), and the [FWPR](#).

HCOP Strategic Initiatives	HCF System				FWPR							
	Strategic Planning and Alignment System	Talent Management System	Performance Culture System	Evaluation System	Recruitment and Succession Planning	, Enhancing Employee Experience, Fostering Employee Well-Being, and Building a Diverse and Inclusive Workforce	Fostering an Agile Organization and Growth Mindset	Enhancing Customer Experience <i>Enabling Priority</i>	Preparedness and Resilience <i>(Enabling Priority)</i>	Leveraging Technology and Modernizing IT Processes	Leveraging Data as a Strategic Asset <i>Enabling Priority</i>	Developing Agency Foresight and Capability <i>Enabling Priority</i>
1.1.1 Increase HR Capacity	X	X			X	X	X	X	X	X		X
1.1.2 Modernize the Agency’s Recruitment Program	X	X			X	X	X	X		X		
1.1.3 Restructure Hiring and Onboarding Process	X	X			X	X	X	X	X	X		
1.2.1 Expand and Leverage Hiring and Compensation Flexibilities	X	X			X	X	X	X	X			
1.2.2 Explore and Market Employee Retention Incentives	X		X			X	X	X				
1.3.1 Mature Workforce Analysis and Planning Products		X		X	X	X	X	X	X	X	X	X
1.3.2 Leverage Workforce and Labor Market Data to Inform Hiring		X		X	X	X	X		X	X	X	X
1.3.3 Provide Support to Hiring Managers	X	X	X		X	X	X	X	X			X
2.1.1 Deploy Health & Wellness Marketing Campaign			X			X	X	X	X			
2.1.2 Expand Workload and Stress Mitigation Strategies			X			X	X	X	X			
2.2.1 Improve Employee Recognition Program			X			X	X	X	X			
2.2.2 Increase Manager Support and Accountability	X		X	X			X	X	X			X

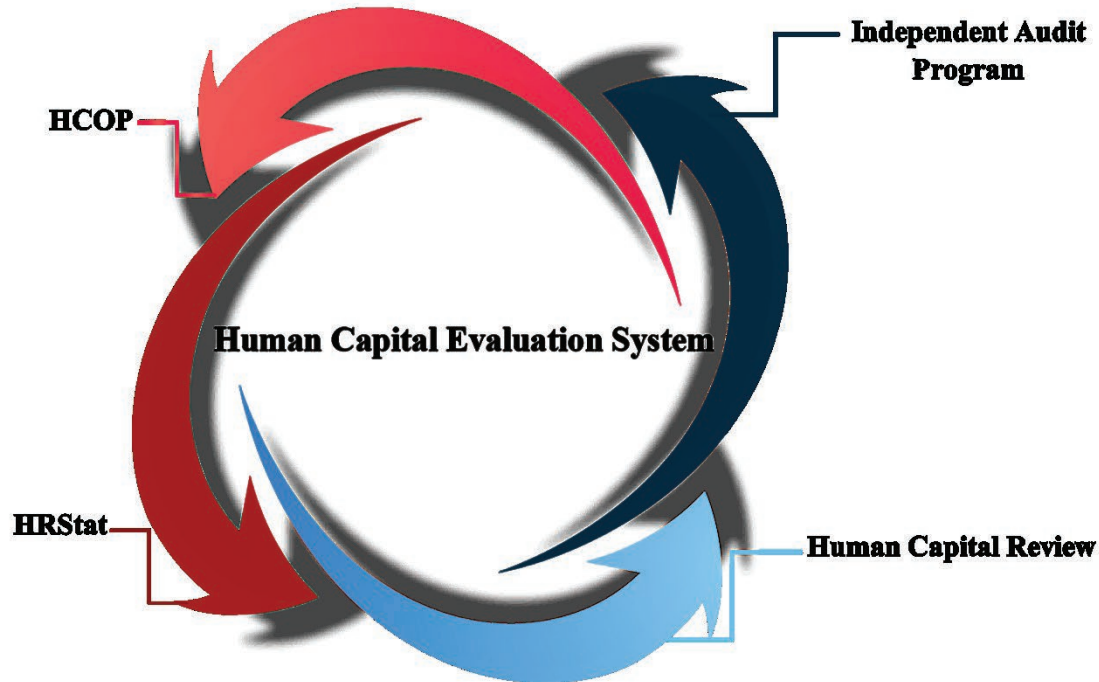
2.3.1 Increase and Improve Agency-Wide Communications	X		X			X	X	X	X			
2.3.2 Promote Collaborative Decision-Making			X				X	X	X			X
3.3.1 Develop and Retain Institutional Knowledge	X	X					X	X	X			
3.1.2 Assess Competency and Skill Gaps		X				X	X	X	X			X
3.2.1 Promote Innovative Training and Development Methods	X	X				X	X	X	X	X		X
3.2.2 Invest in our Future Leaders	X		X			X	X	X	X	X		X
3.2.3 Increase Employee Development Opportunities	X					X						

The chart below reflects our HCOP's alignment with the [PMA](#) and our FYs 2022–2026 ASP.

PMA Priorities (Government-Wide)	SSA FYs 2022–2026 ASP Goals	SSA FYs 2024–2026 HCOP Goals
<p>Workforce</p> <p>Strengthen and Empower the Workforce</p>	Build an Inclusive, Engaged, and Empowered Workforce	Transform SSA into an Employer of Choice
<p>Service</p> <p>Deliver Excellent, Equitable, and Secure Federal Services and Customer Experience</p>	Optimize the Experience of SSA Customers	Improve Workplace Conditions to Drive Engagement
<p>Business</p> <p>Managing the Business of Government</p>	Ensure Stewardship of SSA Programs	Invest in Learning and Development

Appendix B: Human Capital Evaluation System

The HCOP is one part of a four-pronged strategic human capital planning approach within the Human Capital Evaluation System (HCES), as outlined by OPM and documented in [5 CFR Part 250, subpart B](#).



The HCES is our method for monitoring and evaluating the outcomes of human capital strategies, policies, and programs. The HCES includes:

- 1. HCOP:** The HCOP serves as a tool for agency leadership to set a clear path for achieving stated human capital strategies; identify and secure resources for supporting human capital policies, programs, and initiatives; and determine which timeframes and measures to use to assess progress, while demonstrating how the standards of the [HCF](#) system are being fulfilled within each strategy.
- 2. HRStat:** HRStat is SSA's human capital data analysis process, HCOP tracking mechanism, and an organizational development tool that informs discussions and decisions about progress toward accomplishment of the agency's mission and strategic goals and objectives. We conduct quarterly human capital data-driven meetings with C-Suite executives and agency DCs.
- 3. Independent Audit Programs:** We conduct internal audits of select HR transactions to ensure efficiency, effectiveness, and legal and regulatory compliance.
- 4. Human Capital Review:** We conduct an annual meeting with our agency human capital leaders and OPM to discuss the implementation and achievement of human capital goals, including risks, barriers, and successful practices. This review serves as an opportunity for OPM to provide agencies with feedback, as well as identify and share practices and identify

cross-cutting human capital challenges in connection with agency human capital priorities, HCOP goals, and other means of assessing the health of the organization.

Our HCES Policy and Communication Plan is the formal agency-level human capital governance, operating policy, and strategic communications plan for managing and socializing activities related to support management of our HCES throughout our organization. It also explains how we aim to align our HCES with key elements in the [PMA](#), [ASP](#), and [APR](#). We regularly review all components of the HCES to determine their efficiency, effectiveness, mission alignment, and compliance. Specifically, we will evaluate and update the HCES continuously to ensure we:

- Document policies and procedures;
- Communicate policies;
- Review and update policies, as needed;
- Have leadership that is knowledgeable of the evaluation system programs;
- Have leadership that supports the evaluation system programs;
- Resource our programs adequately;
- Conduct HCES competently; and
- Use HCES results to inform organizational goals and priorities.

During the OPM HCES assessment period, we must provide OPM with evidence to support each of the five standards (i.e., Formal and Documented, Leadership Involvement, Communication, Data Driven Decision-Making, Assessment). Following the evidence collection period, OPM provides us with a maturity level (i.e., Reactive, Emerging, Advanced, and Optimized)¹ for each standard. On average, our HCES is rated as Advanced. In addition, OPM provides us with a feedback letter detailing areas of success and improvement. Thereafter, we respond to OPM's feedback by sharing a Maturity Advancement Plan.

¹ OPM's Maturity Levels: **Emerging:** An agency has established processes in place which results in the agency generally achieving its desired outcome but not always. Some inconsistencies may still occur within the agency. **Reactive:** An agency does not have formal processes in place and only becomes involved when an issue occurs, which results in inconsistencies and limited desired outcomes to facilitate change across the organization.

Advanced: An agency is fully integrated and operates in a manner in which the agency achieves the desired results against established benchmarks to facilitate change within the agency. **Optimized:** An agency is engaged and focused on continual improvement to ensure the agency operates in an effective and efficient manner. The agency is considered a leader and is recognized for establishing best practices for other agencies to implement and use.

Appendix C: A New Workforce Planning Approach

Strategic Workforce Planning (SWP) is a holistic concept that integrates workforce analysis and planning, HR management, and capability development to strengthen organizational success by aligning the workforce to both current and future service demands.

We are creating a new SWP business process and framework to establish a more mature agency-wide workforce planning process and guide our ongoing workforce planning efforts. Specifically, as we enhance SWP in the coming years, we are working to develop, implement, and evaluate the following SWP strategies:

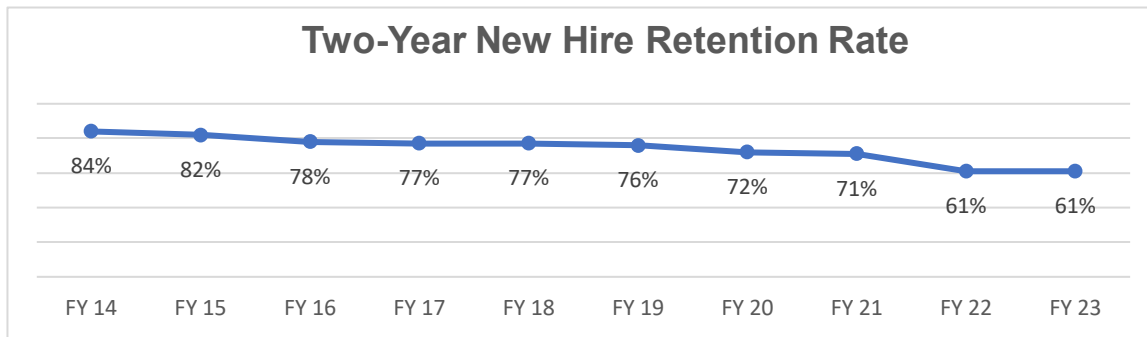
- *The Future Workforce*: A description of the targeted future workforce, including the needed composition and competencies to meet future workload needs, as well as DEIA considerations based on the impact of various internal and external factors.
- *Competency Analysis*: Identification of competency gaps that the agency must mitigate to ensure current and future success in MCOs.
- *Data-Driven Assessments*: A comprehensive supply and demand analysis to accompany our analysis of the workforce's SWOT.
- *Modern Management*: New strategic initiatives to transition and groom today's workforce with the skills required for the desired future state of composition, competence, performance, inclusivity, and engagement.

Our goal is to establish an enterprise-wide workforce planning approach that provides agency leaders and managers with the tools to optimize organizational performance; offers the flexibility and agility to address current and future workforce issues; and educates managers on how to attract the talent our agency needs to achieve its business goals.

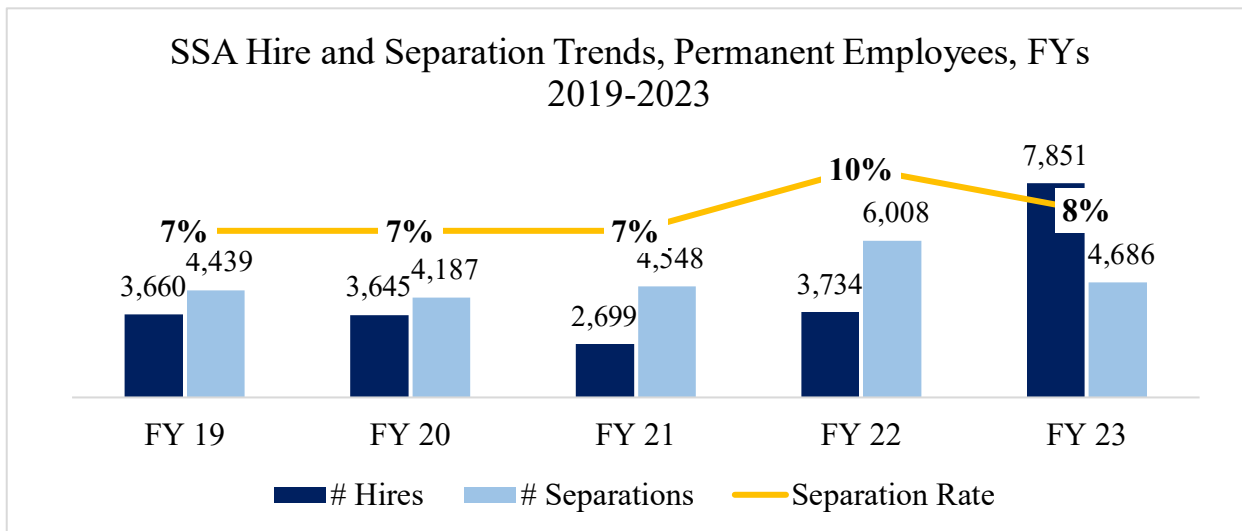
Appendix D: Workforce Data

New Hire Retention

The Two-Year New Hire Retention Rate is a ratio of the number of new hires who remain with us a minimum of 730 calendar days. The FY 2023 New Hire Retention Rate reflects the percentage of FY 2021 new hires who remained at the agency for at least two years. Although the Two-Year New Hire Retention Rate averaged 81 percent throughout the 2010 decade, the retention of new hires has decreased drastically, starting in FY 2020. By FY 2023, just 61 percent of our recent hires were retained for two years or more.

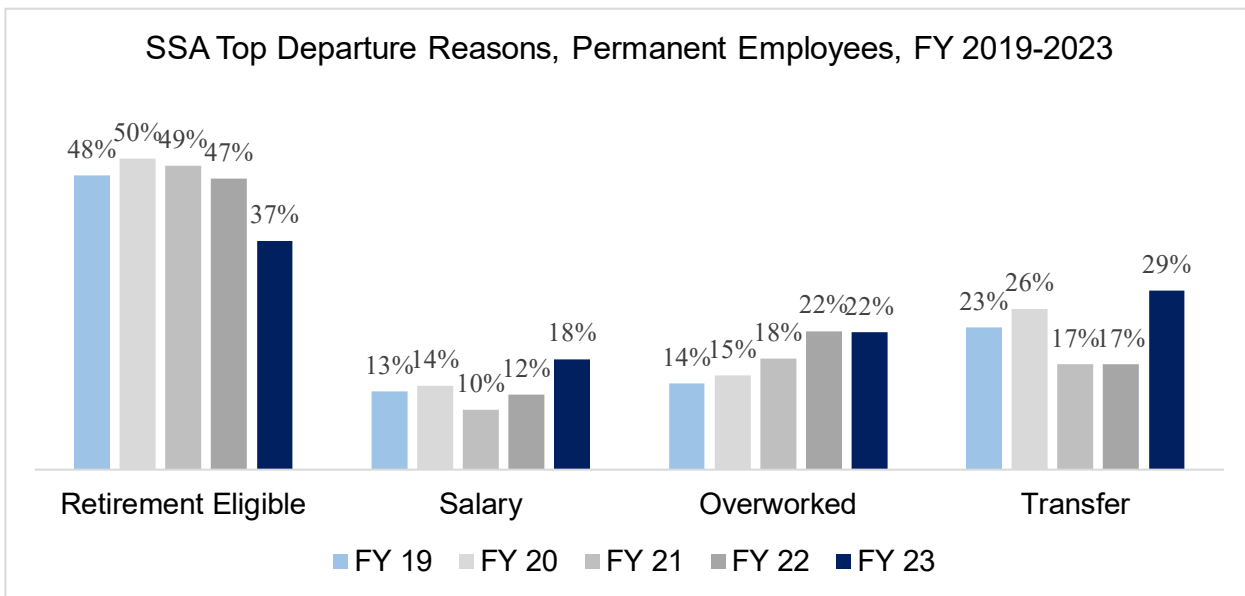
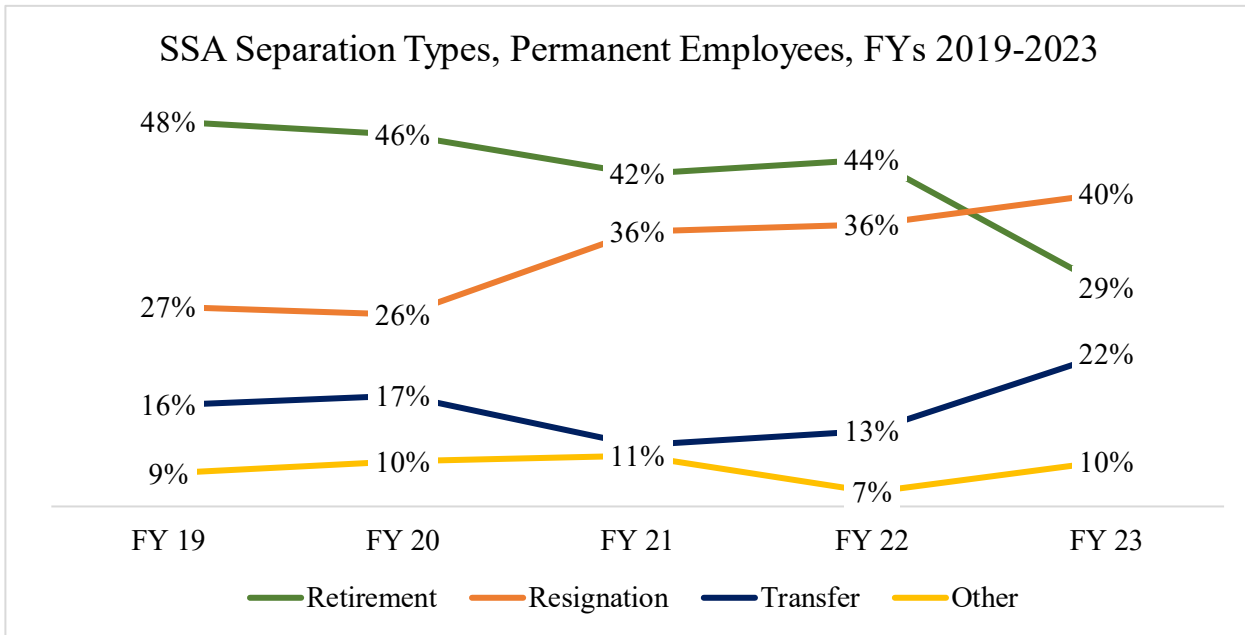


While the decline in our new hire retention is a long-term trend, the decrease in our overall employee retention is a new observation. Our overall separation rate remained steady at 7 percent until FY 2022, when our separation rate increased by three percentage points in a single year, reaching 10 percent. The separation rate decreased to 8 percent in FY 2023.



Employee Separations

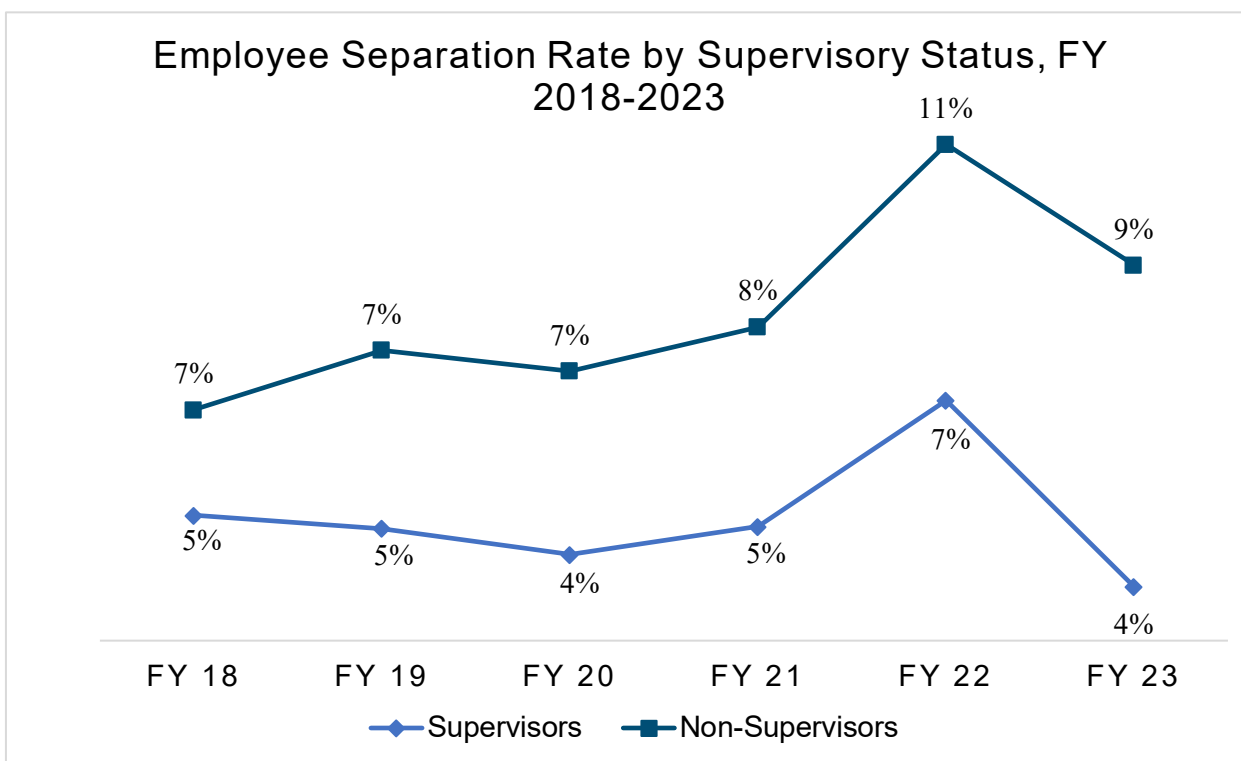
Employee retirement served as the primary reason for departing the agency from FY 2019 to FY 2022. In FY 2023, retirements decreased by 15 percentage points with resignations increasing by 4 percentage points and transfer to another government agency increasing by 9 percentage points. Combined, non-retirement separations increasingly exceed retirements.



Among exit survey respondents, citing retirement eligibility as a reason for departing the agency continues to decrease. Conversely, departing the agency for higher pay and transferring to other government agencies continues to increase. Similarly, the perception of feeling overworked increased through FY 2022 and remained steady in FY 2023.

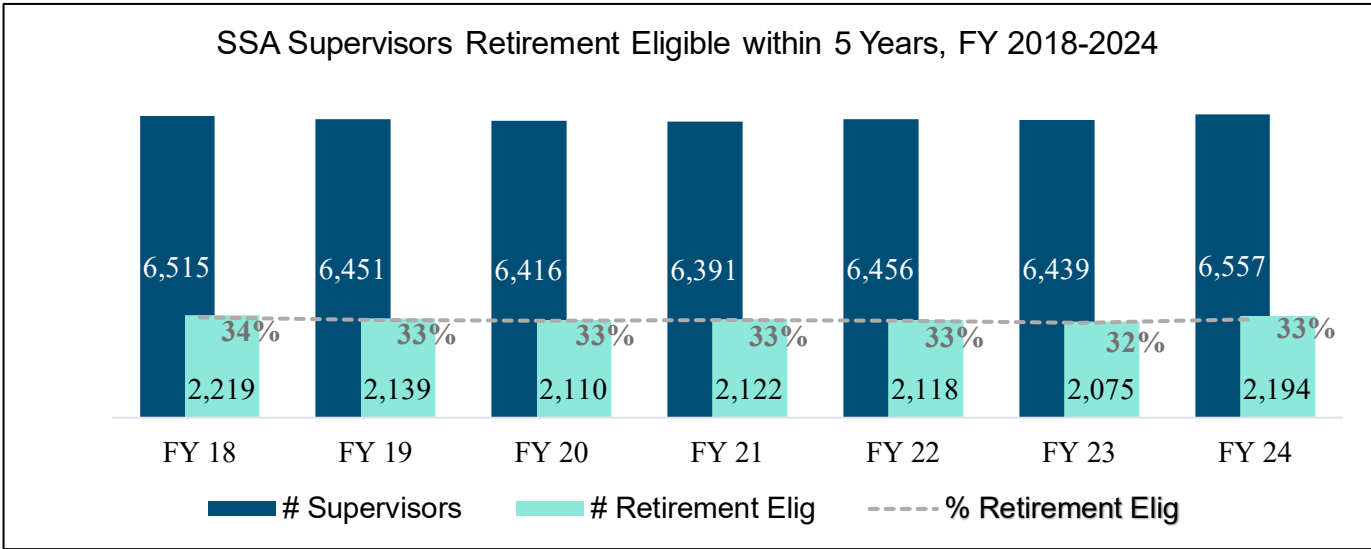
Leadership Separations

The loss of leadership, technical and institutional expertise is an organizational challenge. For our supervisory workforce, our historical separation rate is around five percent; however, it reached seven percent in FY 2022. The four percent supervisory separation rate observed in FY 2023 represents a return to recent historic rates. Despite most non-supervisors leaving the agency for non-retirement reasons, retirement remains the primary mechanism of supervisor separation, representing 69 percent of FY 2023 separations.



Retirements

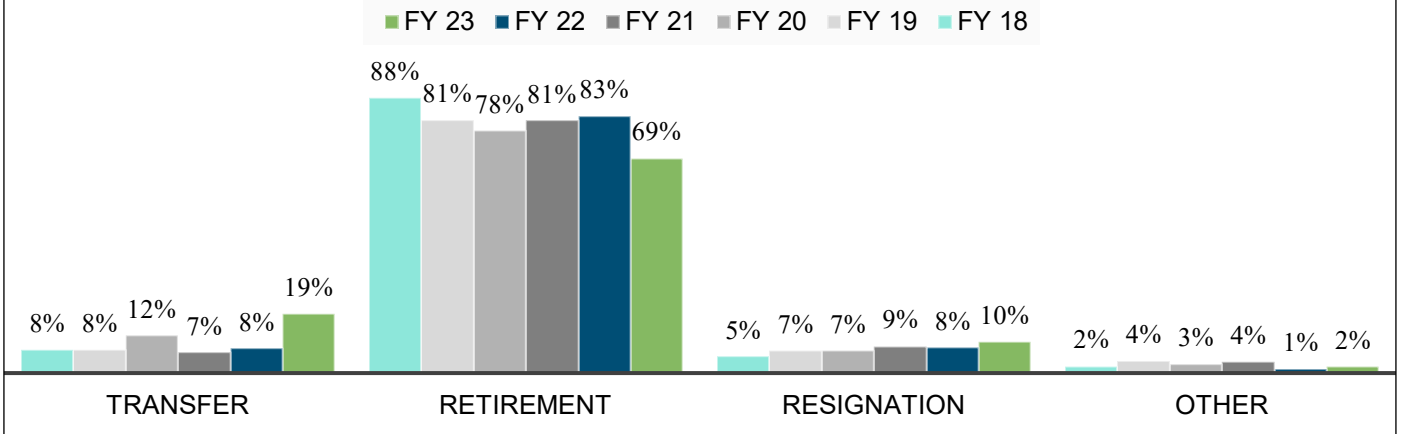
As of the end of FY 2023, our supervisory and non-supervisory retirees continue working roughly six years past their initial retirement eligibility. As of the beginning of FY 2024, 13 percent of our workforce was eligible for regular retirement. Consistent with agency retirement eligibility trends, 13 percent of our supervisory workforce was retirement eligible at the beginning of FY 2024. Despite agency-level retirement eligibility rates for the workforce hovering around 13 percent, observed retirement rates fall closer to just 2 percent.



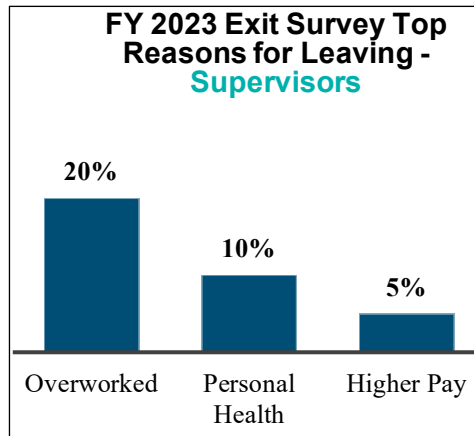
Retirement is how most of our supervisors separate; however, the data reveals a slight increase in the proportion of resignations in recent years.

In the FY 2023 Exit Survey, 20 percent of exiting supervisors cited feeling overworked as a factor in leaving. Feeling overworked remains the most cited, non-transactional, specific reason for leaving for both supervisory and non-supervisory employees.

Supervisor Separation Trends, FY 2018-2023

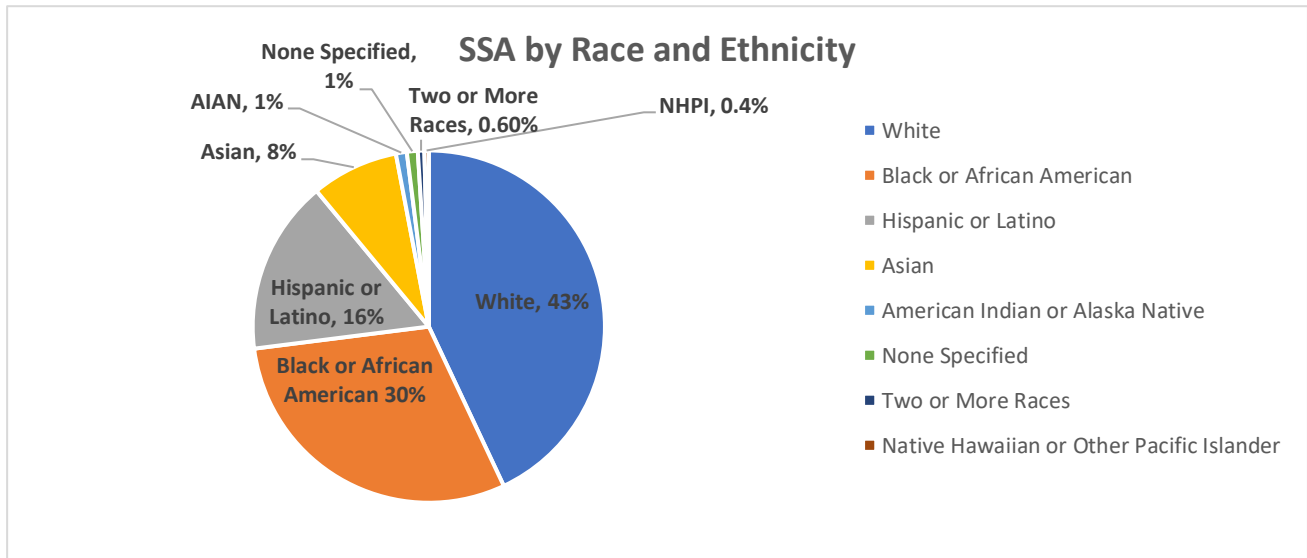


FY 2023 Exit Survey Top Reasons for Leaving - Supervisors

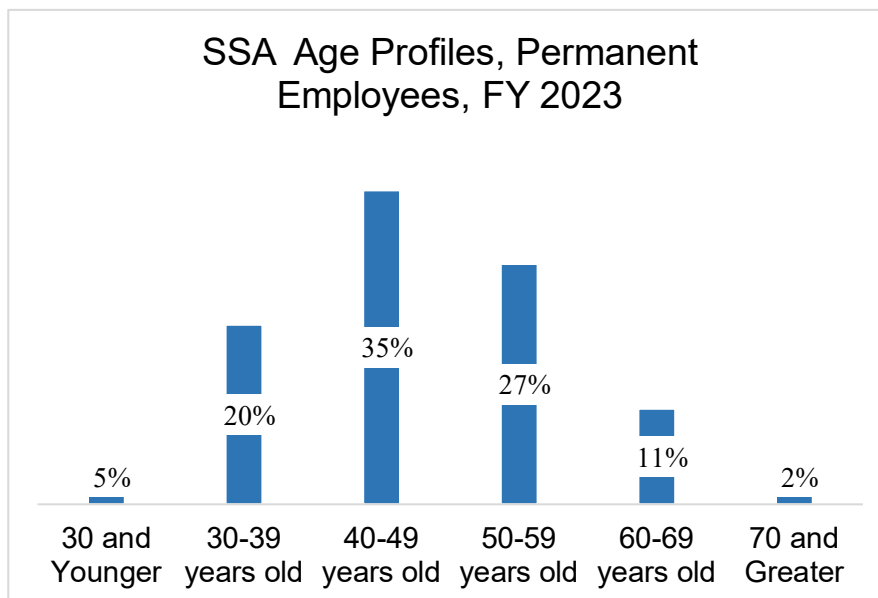


Workforce Diversity

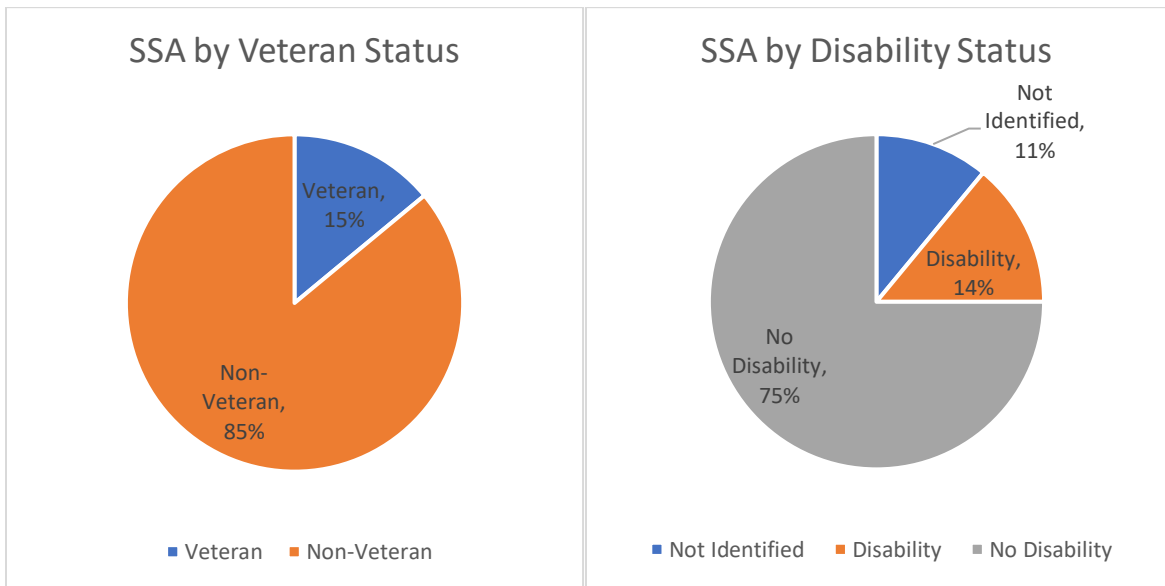
The diversity of our workforce is one of our greatest strengths, with racial and ethnic minorities representing over 50 percent of the workforce.



SSA’s workforce crosses five generations. In FY 2023, the age profiles of SSA employees remained unchanged from FY 2022. The majority of employees fall within the age range of 40 to 59 years old, representing 62 percent of the workforce, followed by those between 30 to 39 years old, representing 20 percent of the workforce.



Our workforce exemplifies a stable representation of veterans and individuals with disabilities. The representation of veterans and individuals with disabilities is 15 percent and 14 percent respectively.



The table below provides a comparison of race, gender, disability, and veteran status of employees across our organization, government, and the Civilian Labor Force (CLF). Although our employees are diverse, a difference exists between our agency and government-wide representation of veterans, respectively at 15 percent and 32 percent. Our representation of racial and ethnic minorities in our workforce is generally higher than our counterparts and the CLF.

SSA to Government-Wide Diversity Comparison (as of 2023)					
Race/National Origin	Government-Wide	SSA	Government-Wide SES¹	SSA SES	CLF²
American Indian and Alaska Native	1.6%	1.0%	1.5%	1%	1.1%
Asian	6.8%	8%	5.5%	6%	6.7%
Black/African American	18.5%	30%	12.4%	21%	12.6%
Hispanic/Latino	10.1%	16%	5.6%	8%	19%
More than one race	2.3%	0.6%	1.6%	3.2%	2.1%
Native Hawaiian and Pacific Islander	0.6%	0.4%	0.2%	0.0%	0.4%
Unspecified	0.7%	1%	0.3%	1.3%	-
White	59.5%	43%	72.9%	64%	77%
Gender	Government-Wide	SSA	Government-Wide SES	SSA SES	CLF
Female	45.9%	66%	41.2%	46%	46.8%
Male	54.1%	34%	58.8%	54%	53.2%
Disability Status	Government-Wide	SSA	Government-Wide SES	SSA SES	CLF
EWD	20.6%	14%	11.3%-	7.7%	4.6%
EWTD	2.2%	3.6%	1.3%-	0.7%	-
Veteran Status	Government-Wide	SSA	Government-Wide SES	SSA SES	CLF
Veterans	28.4%	14%	17.8%-	10.3%	-

¹ Data from Fed Scope and OPM.

² Data Source - November 2023 [U.S Bureau of Labor Statistics Report](#) and [Civilian Labor Force with a Disability Report](#) provides RNO data as of 2022.

Agency policies and reports on potential barriers are available on the Office of Civil Rights and Equal Opportunity's [website](#).

Appendix E: Leadership and Core Competency Model



Appendix F: HCOP Governance Structure and Key Officials

Agency Senior Leaders use the HCOP to chart progress on the agency’s strategic human capital initiatives and ensure the CHCO has the resources and support needed to deliver the agency’s annual goals and objectives.

C-Suite Executives (Operating Officer, Financial Officer, Performance Improvement Officer, Technology Officer) use HCOP results as a conversation-starter with the CHCO and senior agency leaders about the specific financial, contractual, Information Technology, and other resources needed to execute the agency’s human capital strategies.

CHCO utilizes the HCOP to align senior agency leaders, Chief Experience Officer, and other partners around a specific human capital operating agenda for the year; prioritize the work of the human capital team; and through quarterly HRStat Reviews and independent audits, monitor, evaluate, and communicate progress on an ongoing basis.

Agency HR Practitioners use the HCOP to maintain consistency with the agency’s human capital priorities and align their individual work plans to support those priorities. In addition, agency Accountability Program Managers can use HCOP results to support effective oversight and evaluation of the agency’s human capital strategies.

WPGB serves as the executive-level recommending body and has overarching responsibility for both succession and workforce planning efforts. The WPGB:

- Provides oversight and consultative services for the development of the HCOP.
- Serves in a continuous role as the agency’s governing body for all succession and workforce planning efforts.

WPIT is composed of agency staff representation and serves as the recommending body for HCOP initiatives and challenges. WPIT members also support agency succession and workforce planning initiatives. WPIT members:

- Provide component-specific input on workforce and human capital needs (i.e., competency based human capital management), including governance of workforce planning at the agency and component levels.
- Review and provide feedback on relevant research, benchmarking studies, and best practices within the employee development and talent management arena.
- Validate SWOT analysis and environmental scan to identify and prioritize human capital challenges.
- Identify human capital challenges, which are the fundamental challenges affecting the organization from a human capital perspective (e.g., attracting, hiring, engaging, developing, and retaining top talent, addressing training issues and skills gaps, fostering a high-performance work culture).
- Research innovative human capital initiatives to address the identified challenges.

- Present proposed initiatives and measures for WPGB consideration.

Appendix G: Key Stakeholders

Internal and external organizations and groups of individuals have a vested interest in our HCOP. As part of our environmental scanning process, we identified the following stakeholders that are critical to the success of this plan:

Public: Serving our customers is at the heart of all that we do. Our customers have a vested interest in holding ourselves accountable for maintaining a work culture that hires and develops knowledgeable staff to provide quality service. In addition, the public is interested in ensuring that we retain our staff to provide continuity of service. This document is the first HCOP in our agency's history published to our website for public viewing.

Our Senior Executives: Our executives have the primary leadership responsibility for overseeing and administering activities reflected in the [ASP](#). The Senior Executive corps works together to achieve the Commissioner's goals and to guide the agency into the future for economic security. The HCOP provides Senior Executives with a roadmap to address current and future workforce challenges.

Our Managers: Our managers are responsible for providing day-to-day oversight and administering SSA's programs and services. Our managers have a vested interest in ensuring the HCOP outlines the actions we will take to optimize organizational performance, address current and future workforce needs, and attract the talent we need to achieve our business goals.

Our Employees: The HCOP provides our employees with an understanding of the actions being taken to support their chosen career paths, increase engagement, and support and foster opportunities for professional and career development.

Advisory Councils: Our agency currently has eight advisory councils that serve as advisors to the Acting Commissioner and Executive Staff on issues and concerns that are important to employees and the broader community serviced by SSA. Each of the Advisory Councils has a vested interest in ensuring the HCOP outlines activities that will promote DEIA in hiring and advancement.

Labor Unions: Our three labor unions – American Federation of Government Employees, National Treasury Employees Union, and the International Federation of Professional and Technical Engineers – represent and advocate our bargaining unit employees on matters relating to agency policies, practices, and general conditions of employment. Our labor unions have a vested interest in ensuring the HCOP addresses actions the agency is taking to improve human capital management and foster a culture of engagement and collaboration for all employees.

OPM: OPM serves as the chief HR agency and personnel policy manager for the Federal government. OPM leads and serves the Federal government in enterprise HR management by delivering policies and services to achieve a trusted and effective civilian workforce. The HCOP is a strategic human capital management requirement for Federal agencies. OPM has a vested interest in ensuring our HCOP meets the regulatory requirements and aligns with government-wide workforce priorities.

Office of the Inspector General (OIG): The mission of the OIG is to serve the public through independent oversight of our programs and operations. OIG's Office of Audit conducts comprehensive financial, IT, and performance audits of SSA's programs and operations. These audits identify opportunities for improvement and recommend corrective action to shape change in our programs and operations, leading to increased efficiency and greater effectiveness. OIG has a vested interest in ensuring that the HCOP describes how we will attract and hire the talent needed to meet our mission now and in the future.

Office of Management and Budget (OMB): OMB serves the President of the United States in overseeing the implementation of his or her vision across the Executive Branch. OMB's mission is to assist the President in meeting policy, budget, management, and regulatory objectives and to fulfill the agency's statutory responsibilities. OMB has a vested interest in our agency's ability to attract, hire, and retain employees in effort to meet our service goals and improve the customer experience.

Appendix H: Long-Term Human Capital Management Improvement Plan

The Social Security Administration's Long-Term Human Capital (HC) Management Improvement Plan represents a high-level strategy aimed at optimizing our enterprise-wide approach to HC management. It also reflects our strategic investment in our most valuable asset: our employees. Grounded in the principles of strategic service delivery, workforce planning, talent management, employee engagement, and continuous improvement, this plan outlines enterprise-wide HC reform initiatives designed to enhance recruitment, retention, workload efficiency, and data-driven decision making, while fostering a culture of innovation and excellence.

Although we acknowledge our many HC management success, we also recognize that we cannot continue to successfully operate over the next ten years and beyond with our greatest HC challenges in our forefront. Therefore, beyond the scope of the FYs 2023-2026 Human Capital Operating Plan, we are committed to making significant changes and adopting the following operational-wide HC reform initiatives:

1. Improve the Customer Experience by Transforming the Employee Experience
2. Revolutionize Talent Acquisition
3. Modernize Information Technology (IT) Solutions & Automations
4. Mature Data-Driven Decision Making

By prioritizing organizational-wide HC reform initiatives, we believe SSA will position itself for sustained success and competitiveness in a rapidly evolving environment. Through collective effort and a shared commitment to excellence, we are confident in our ability to realize organizational change for the purpose of achieving greatness together.

To review the comprehensive Long-Term HC Management Improvement Plan, please visit [Social Security Administration Comprehensive Long-Term Human Capital Strategy \(ssa.gov\)](#), for internal use only.



Securing today
and tomorrow