EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET
WASHINGTON, D.C. 20503

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DEPUTY DIRECTOR
FOR MANAGEMENT

MANAGEMENT PROCEDURES MEMORANDUM NO. 2015-02

MEMORANDUM FOR: ALL CFO ACT EXECUTIVE AGENCIES
Senior Real Property Officers, Chief Human Capital Officers, Chief Financial Officers

FROM: David Mader
Acting Deputy Director for Management

SUBJECT: Collection of Personnel Data for Real Property Metric

OMB CONTACT: William Hamele (202-395-7583, whamele@omb.eop.gov)

The President's Management Agenda presents a comprehensive and forward-looking plan to deliver a 21st Century Government that is more effective, efficient, and supportive of economic growth. One of the pillars of the Management Agenda is improving the efficiency of Government operations to enhance productivity and achieve cost savings. Agency real property portfolios present an opportunity to improve efficiency and realize potential cost avoidance.

For federal real property the "Square Feet per Person" (SF/person) metric has proven to be an invaluable resource to assess real property efficiency and identify consolidation and disposal opportunities since it was first collected in May, 2014. To improve the accuracy of the personnel data that supports the SF/person metric, the CFO Act agencies will report personnel data again from December, 2015, through January, 2016. The data collection will ensure this valuable metric is available to the agencies and that it provides accurate information. The data will benefit Chief Human Capital Officers by providing employee location data at a more detailed level than duty station.

Close coordination and support among agencies' Chief Human Capital Officers, Senior Real Property Officers, and Chief Financial Officers is critical to collect a complete and accurate personnel data set. Your agency should begin internal coordination now to identify the most efficient and cost effective method(s) to collect and report this data into the MAX Collect exercise that will open for date input in December, 2015.

My staff has begun reaching out will provide details of the data collection to the CXO Councils within the next few weeks to help your agency prepare for the data collection and reporting. If you have any questions regarding this Memorandum please contact William Hamele (202-395-7583, whamele@omb.eop.gov).

Fiscal Year 2015 GSA Guidance
Gathering Personnel Data for the Square Feet per Person
Real Property Metric

Introduction

The Administration has developed metrics to measure and benchmark the performance of the Federal Government's work in key administrative areas to include real property. To implement the real property element of the President's Management Agenda (PMA), four real property performance metrics have been developed and issued.

- Current Portfolio Square Feet as a Percent of Freeze the Footprint Baseline
- Rent per Square Foot
- Operation and Maintenance Cost per Square Foot
- Square Feet per Person

The metric "Square Feet per Person" requires that all Chief Financial Officer (CFO) Act agencies count federal and contractor personnel down to the asset level for all assets categorized as predominant use "Office" in the Federal Real Property Profile (FRPP). The purpose of this guidance document is to provide strategies and methodologies that agencies can use to count and report federal and contractor personnel at the asset level. Information on personnel location must be collected at the asset level to provide accurate data to assess how efficiently agencies are using their office space.

Requirement for Agencies

All CFO Act agencies are required to submit fiscal year (FY) 2015 personnel data for all assets that are predominantly used as office space. The data is to be reported on or before February 5, 2016. Personnel data includes both the number of federal employees and resident contractors and shall be reported at the individual asset level. Agencies will use the reporting tool established in the OMB MAX collaboration, information sharing and data collection web based application to submit their personnel data. Personnel counts for federal employees and resident contractors are the only data elements agencies must report. All other fields in the MAX templates will be pre-populated with data from the FY 2015 FRPP data submission files and the General Services Administration's (GSA) occupancy agreement (OA) databases.

General Services Administration Data Analysis

GSA will pair each agency's submitted personnel data with the applicable data reported in the FY 2015 FRPP to develop a square foot per person metric. Data will be calculated at the asset level and each agency's data will be summarized at the agency portfolio level. The results of the analysis will be provided to each agency upon completion. The timeline for completion is

February 15, 2016. The results of this analysis will demonstrate the effectiveness of the metrics and the systems and/or methods agencies use to collect data to determine whether they require revision or enhancement. Combining metric values with standard real property data elements will facilitate identification of assets within agency portfolios that need additional review with regard to cost or space utilization and provide opportunities for cost and efficiency improvements.

Definition of Personnel Metric

The "Square Feet per Person" metric will be calculated by dividing the numerator "Current office space SF by asset" by the denominator "Personnel as whole number counts of federal employees and contractors in office space," using the definition below.

In consultation with the Chief Human Capital Officer (CHCO) Council, each agency should contact their CHCO to ensure the agency makes the count in a consistent manner. The reporting tool described in this guidance shall be used to report the data for this metric.

Personnel Definition:

- The total number of full and part time employees who are permanently assigned to a facility;
- Seasonal hires, interns, and other temporary staff if they predominantly work in the office and are employed for three months or longer; and
- Individuals who telework less than five days a week but are permanently assigned to the location are counted.
- The total number of resident contractors. Resident contractors are those whose primary work location is the facility in question. The term "Resident contractor" excludes janitorial staff, construction workers, movers, security guards, and all other contractors who do not work from a desk and are not typically considered "office workers."

Agency reported personnel data will be used for pre-decisional data analysis and will not be distributed outside of the federal community.

Methodologies for Personnel Data Gathering

The Square Feet per Person metric will provide agencies with the ability to compare their space utilization across all the office buildings within their portfolio and against other benchmark data. Calculating this metric requires knowing the square footage occupied by your agency in each office building and the number of people working in them.

The square feet needed for this metric will be provided from existing data sources including the FRPP and GSA occupancy agreement databases. Agencies will be required to submit personnel numbers for each building asset into the pre-loaded spreadsheets in MAX. There will be two separate columns in each row to populate personnel numbers. The first column will be populated with the total number of federal employees and the second column will be populated with the total number of resident contractors occupying each building asset.

Due to the large number of variations in systems and agency collection methods, it is not possible to provide a single methodology to collect personnel data that would apply across all CFO Act Agencies. Each organization submitting data for this metric will be required to develop an internal methodology for collecting the information according to their unique environment. The directions below are provided as a guide to assist in thinking through the types of resources and processes that could aid in developing your agency's data collection methodology:

A. Determine where in the organization work location information is available. The key is to identify the work location for employees and contractors resident in federally owned or leased office buildings.

B. Create business rules describing the systems, processes, definitions and constraints that apply to personnel data collected.

C. Identify who owns the data systems. Coordinate with the business owners of the systems or data to discuss data collection requirements. At a minimum, meet with the CHCO or Human Resource (HR) representative and the Chief Information Officer (CIO). Others may include the Chief Acquisition Officer (CAO), Administrative Services and the Security Office.

D. Catalog where the data can be found and identify what systems currently house the data.

    - A list of potential data sources for collecting federal employee counts could include:

        - Human Resources Management System - The HR system will contain employee personnel data. A work location field may already be included in the database. An indicator to identify area for locality pay may also help in matching personnel records with the building data.

        - Agency Specific Data Systems - Agencies may have developed their own method for capturing who is assigned to each building location. These systems should be updated on a regular basis to provide accurate data and account for employee and contractor churn.

        - HR Connect - Customers of Treasury's HR Connect can access a report "Current Headcount by Org Building Location." This predefined standard report is available in the Workforce Analytics tool.

        - Active Directory - This product provides authentication and authorization into computer systems and is tied to data that has been collected to determine who is actively using agency systems. Some agencies may have developed a method for determining the location of users and to identify users who are no longer accessing their computer systems.

- Identity Credentialing and Access Management System/Personal Identity Verification (PIV) Card - An agency's identity credentialing and access management system is the central system the agency uses to provide security clearances and could provide access verification credentials for both physical access to the buildings and logical access to computer systems.

- Information Technology (IT) Help Desk System - Help desk protocols often require employees or contractors to update contact information to include building location each time a request is made for IT support.

- Finance System - The agency finance system may provide payroll information that would include a physical building work address as part of the data that is merged with the HR system data.

- Data Calls to appropriate agency staff - A more manual intensive approach to data collection is to put out a data call to the lead people in the organization responsible for facility management or administration and require a template be completed by building to count personnel in each asset.

- A list of potential data sources for collecting resident contractor counts could include:

  - Identity Credentialing and Access Management System/PIV Card
  - Active Directory
  - IT Help Desk
  - Data Call to appropriate agency staff
  - Poll of agency contracting officers - Contracting officers who have conducted acquisitions for professional services, may be a good source of contract terms and conditions to identify contracts that include federal office space or "onsite rates" in the price proposal.

E. If the above systems or sources do not produce a data set that has employees and contractors by work location, it will be necessary to examine the data sources and determine how they can be merged. This can be done with any common field that exists between the data sources and complies with the business rules. Merging data based on address or an asset's real property unique identifier that already exists in FRPP will be essential to providing the requested data.

F. Verify and validate the accuracy of the data. Check against the business rules to ensure consistency.

G. Begin planning and implementation of a long term solution to accurately report personnel on an annual basis at the asset level. Design a process to create a repeatable data collection methodology to ensure that each agency can report personnel data by asset with a high level of confidence in the accuracy of the data.

The goal is for each agency to have a permanent system for aligning personnel with real property assets. This data increases an agency's responsibility to determine adequate and efficient space requirements, allow data analysis for policy formulation and impact studies, and develop accurate data for emergency management efforts.

Agency Examples of Current Processes to Collect Personnel Data

Some agencies have human resources systems that track employees to the asset level. Others have developed systems based upon Microsoft Active Directory or email systems that track employees to individual buildings for emergency management purposes. Examples of current agency practices are provided in the Appendices to provide insight into methods that can be used to collect personnel data.

Appendix A: Department of Treasury, Shared Services

Appendix B: Department of Interior, Microsoft Active Directory

Data Reporting

To assist agencies in this collection effort, OMB has developed the PMA Federal Office Building Personnel Homepage in MAX under the Financial Management Community. This is the landing page for the collection of Federal asset-based personnel data to support the Administration's goals on benchmarking real estate data.

To access the PMA Federal Office Building Personnel Homepage, click on the following link to log in: https://max.omb.gov/community/x/9IuBKg

If you do not have a MAX ID go to: https://max.omb.gov/maxportal/
At the top of the page click on "Don't Have a MAX ID Yet?" and then click on the "Register Now" tab to obtain an ID. Once you have obtained a MAX ID click the first link provided above to reach the real property data collection home page.

Upon reaching the home page you will have the option of selecting from the following under the Application Link:

- **2015 PMA--Owned and Direct Leased Properties Collection Tool**
- **2015 PMA--Personnel Data for GSA Occupancy Agreement Collection Tool**

The two links are provided to allow for reporting agency personnel data by asset - one for agency owned properties and direct leases identified in the FRPP and the other for assets leased in GSA buildings through OAs.

Upon clicking on either link you will be presented with a new screen. On the left hand side you will find a list of agencies and bureau components. Clicking on your organization will present a spreadsheet listing the applicable assets.

Both collection templates will be partially pre-populated. The only two fields that need to be populated with a numeric value are # Federal Personnel and # Contractor Personnel. These values can be added directly into the MAX spreadsheet by clicking the edit button or the spreadsheet can be downloaded into Excel, populated and then uploaded to the MAX tool for submission. If you choose to update the spreadsheets online, be sure to **save** your work often!

It is important to note that while agency owned assets and direct leases may house more than one agency bureau, the asset will only appear in the spreadsheets under the predominate using organization, as reported in the FRPP. In order to produce accurate metrics, agencies must ensure that the spreadsheet is populated with the total number of personnel and contractors for the entire asset, not just the primary bureau occupant *(Agencies should ONLY report zero (0) in the spreadsheets if the asset truly has no personnel associated with it. If the agency knows that the building does house people but does not know how many, then the field should be left BLANK. Buildings with missing/blank personnel data will not be included in the space utilization metric calculation.).*

Assets that are occupied under GSA OAs, on the other hand, may be listed in the spreadsheets multiple times and under multiple organizations. In these cases, agencies should make every effort to report personnel data for each of the OAs. If the agency does not track personnel data at the OA level, every attempt should be made to distribute the total number of federal personnel and contractors in a manner consistent with the square feet reported *(Agencies should ONLY report zero (0) in the spreadsheets if the OA truly has no personnel associated with it. If the agency knows that the OA does house people but does not know how many, then the field should be left BLANK. OAs with missing/blank personnel data will not be included in the space utilization metric calculation.).*

Once you have completed adding the number of federal personnel and contractor personnel assigned to each asset or OA, you must **save** the data and **submit**. Agencies are to complete the data entry process no later than February 5, 2016.

For questions on the GSA guidance, please contact Stephanie Klodzen at (202) 501-1376 or stephanie.klodzen@gsa.gov. Questions regarding PMA Policy, metrics and the MAX data collection tool may be directed to Anthony O'Farrell at (571) 241-1072 or anthony.ofarrell@gsa.gov.

Appendices

Appendix A: Department of the Treasury, Shared Services

Appendix B: Department of the Interior, Microsoft Active Directory

APPENDIX A:

DEPARTMENT OF TREASURY, SHARED SERVICES

Treasury Shared Services customers have a variety of tools available for consumption. One such tool is Workforce Analytics. Workforce Analytics contains several predefined standard reports as well as the ability to create custom reports. The datasets contained within Workforce Analytics include NFC Paypers, NFC Perhis and HR Connect.

The Enterprise Data Management team has created a report to identify buildings utilized by Treasury Shared Services customers. The report will display a headcount and FTE count of employees by agency, building state, building address and office name. This FTE count is calculated by the following: Full-time = 1, Part-time = 0.5

It is important to note that the information is updated by personnel. The information will only be accurate if the agency personnel update the HR Connect information in a timely and accurate manner.

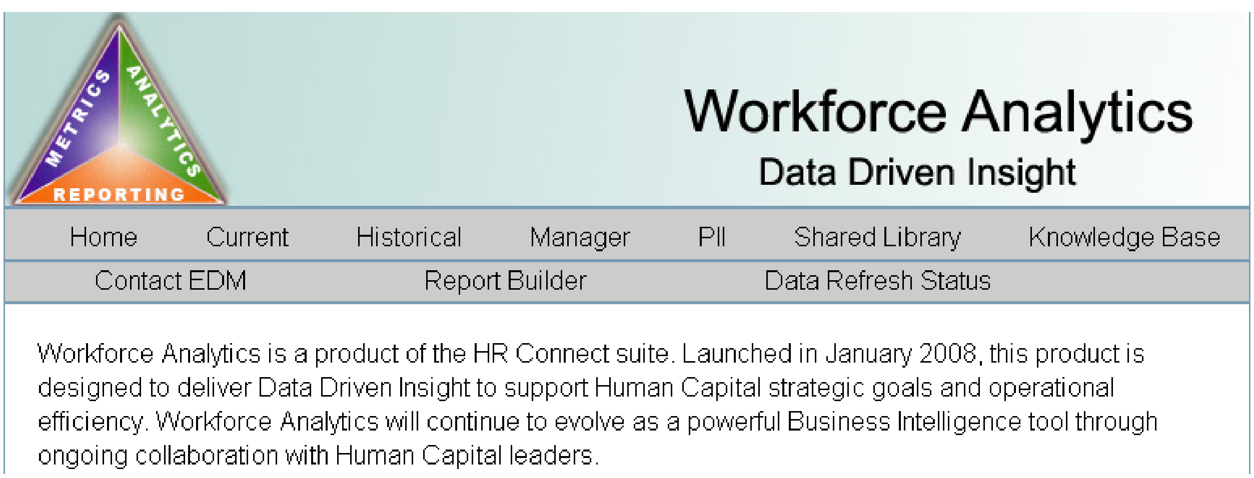
Please follow these steps to access the report.

Step 1: Authenticate to Workforce Analytics

The Workforce Analytics tool is available here: [Workforce Analytics]

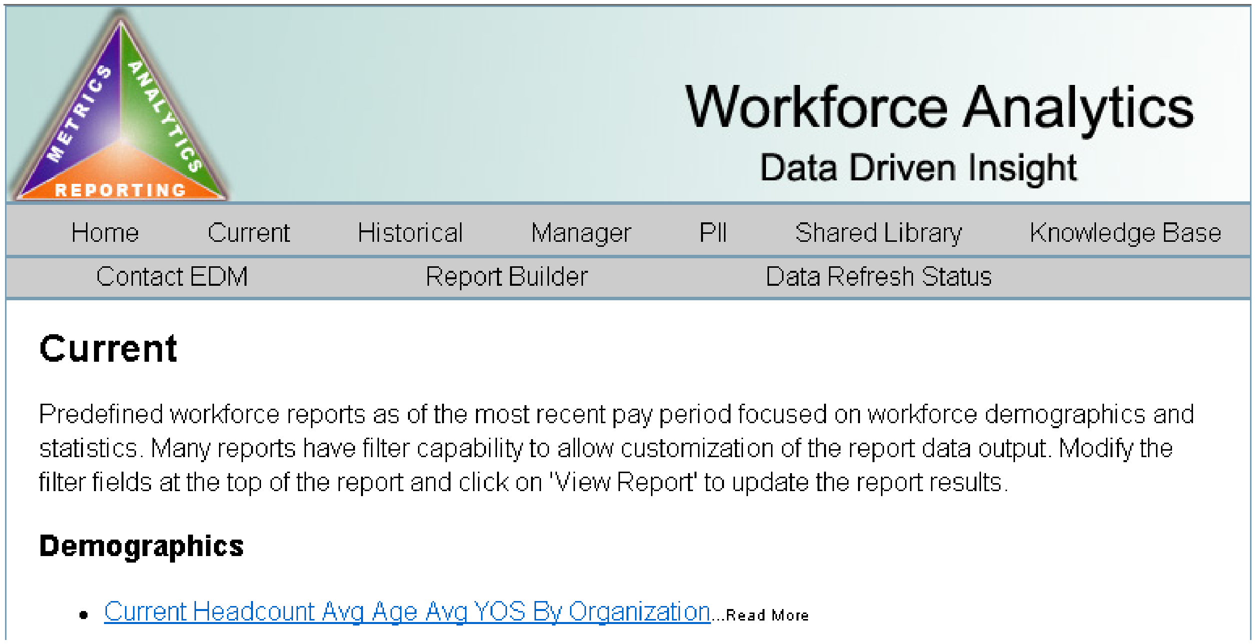
The username and password will be the user's HR Connect username and password. Contractors not managed through HR Connect will need to contact the HR Connect helpdesk for assistance.

The first time accessing the system the user will be prompted to enter credentials twice. This is expected. The second processing of credentials may take several minutes. Please be patient. After successful login the user will see the home screen.



Step 2: Access the report

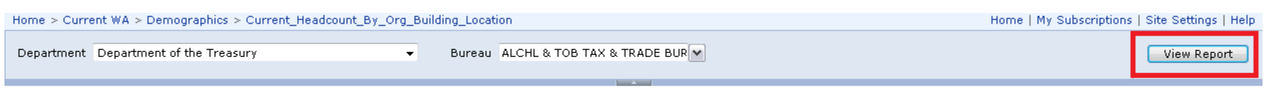
Select the 'Current' page from the menu



Locate the report *Current Headcount By Org Building Location* listed under 'Demographics'

Click the link to launch the report.

The user's department and agency will automatically populate as available values in the parameter fields. Select the desired values and click 'View Report' to run the report.



After the report output displays the user will have the option to drill down the organization to the state, address and office.

APPENDIX B:

DEPARTMENT OF THE INTERIOR MICROSOFT ACTIVE DIRECTORY

The Department of the Interior (DOI) developed an information technology application that enables all 70,000 DOI employees to update their location information in MyAccount, an application contained within Active Directory, an application within DOI's IT system. Active Directory is a Microsoft tool used by the CIO for employee rights, permissions and authentication. MyAccount prompts employees to enter their physical location (Postal address and Latitude/Longitude) through direct data entry of these values or with the help of a map feature.

Employees are prompted to enter this data once a year through issuance of a Department-wide memo to all employees. The data entered into MyAccount then updates each employee's Active Directory information in the IT system. A future effort will align these employee locations/buildings with the Real Property Unique Identification (RPUID) number contained in the Federal Real Property Profile database.

The design of the MyAccount application allows an employee to enter their data within two minutes. To implement the PMA personnel data collection process, DOI plans to provide two months for all 70,000 employees to enter their information. The OCIO and the bureaus will then compile the information and associate each address / location with the correct RPUID to identify employees to the appropriate building. Future enhancements to MyAccount will allow DOI to pre-populate the RPUID in MyAccount to enable employees to more readily identify (in the system) the specific buildings in which they work.

The next five Appendix pages display the information screen and instruction for using MyAccount.

The My Account application was originally created in response to Federal Real Property Profile guidance to count and report personnel in each facility in 2011 and the need of DOI Emergency Management program to account for DOI employees in facilities impacted by fires, earthquakes, hurricanes, and tornadoes. Two other benefits My Account provides are it enables DOI security staff to document each facility's security level and it allows the DOI real property program to characterize space utilization to identify collocation and consolidation opportunities.

Enhancements

New features for your BisonConnect Account

Learn more about Apps

- View past Tips & Tricks
- Searching for emails

Other Features

- **Group lookup:**

If you want to know who's in a specific email distribution list or find out which lists you are in, then MyAccount can help. Here's how:

1. Go to MyAccount.
2. Click on "Distribution Groups" icon.
3. See the list of email distribution groups in which you are a member.
4. Click on the group name to see the members.
5. To search for a group, use the search box to find a group and then

Dear employee,

We are pleased to announce a new BisonConnect tool called **MyAccount**.

This new tool is designed to help you locate your colleagues and make it easier for others to find you by ensuring your directory information is correct! Now you can update your directory profile, including your work location, and identify group distribution list members.

How to update your directory profile

It's now easy to update your contact information in the BisonConnect Directory, so please update your info today! Here's how:

1. Open MyAccount through the new BisonConnect App Launcher (the "Google Grid"), *or*
   Visit https://myaccount.doi.gov/ and enter your user name (note: your username is what you use to login to your network computer, plus your @bureau.gov at the end, e.g. jsmith@ios.doi.gov or Jean_smith@ios.doi.gov - use the same password you use to login to your network computer).
2. Click on the "My Profile" icon.
3. Click any field to enter or edit information (fields are automatically saved after pressing Enter or clicking out of a field).
4. Your updated directory profile will be available the following business day.

What you need to do

- Update your directory profile by March 31, 2014.
- When updating your address information, make sure to use the lookup tool (a magnifying glass) to add the longitude and latitude for your work location.

hit 'Enter' to submit.

If you have any questions or comments, please contact your help desk.

How to use MyAccount

MyAccount is designed to help you locate others and make it easier for others to find you. All DOI employees can now easily **update your directory profile** and l**ookup group distribution list members.**

Getting Started

- Open MyAccount through the new BisonConnect App Launcher (the "Google Grid"), *or* Visit https://myaccount.doi.gov/ and enter your user name (note: your username is what you use to login to your network computer, plus your @bureau.gov at the end, e.g. jsmith@ios.doi.gov or John_Smith@ios.doi.gov - use the same password you use to login to your network computer).

- Log in to myaccount.fws.gov using the same username and password you use to login to your computer credentials
- You should see the following screen:

Update My Profile

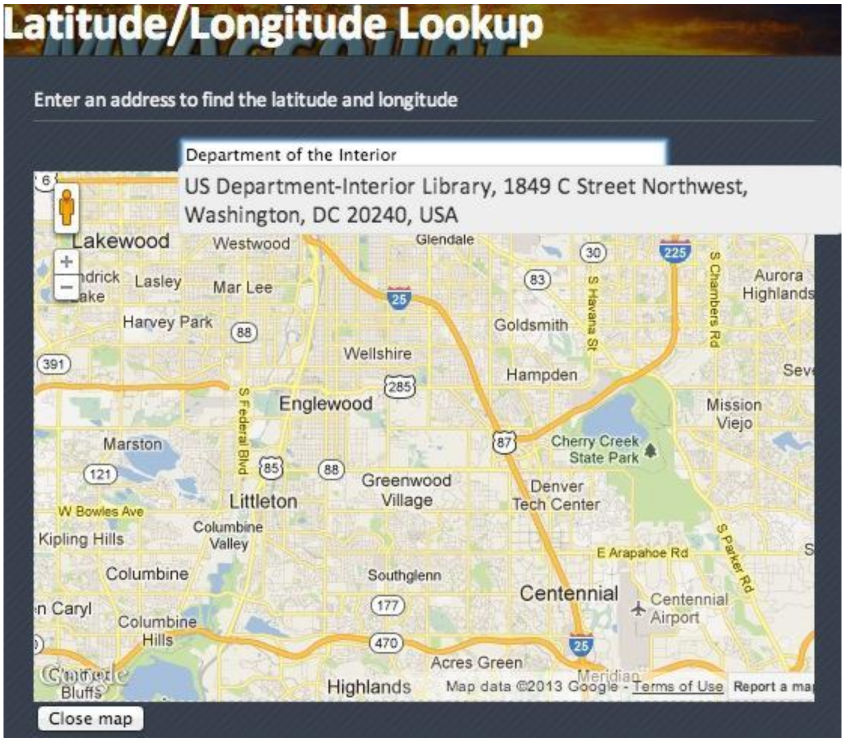
Here's how to update your directory profile

- Click on the "My Profile" icon to edit your directory information
- Enter information for all of the appropriate fields including title, supervisor and organization code (org code)
- Your updated directory profile will be available the following business day

Add address, latitude and longitude

Here's what you need to know

- If you have an address populated in the directory, MyAccount will automatically populate the latitude and longitude based on that address however
- If you don't have an address populated in the directory, you have the option to add one
- Click on the magnifying glass icon to the right to enter an address
- Once you choose an address from the suggestion, (pressing enter or clicking the address), a dialog to populate latitude and longitude will appear


Latitude/Longitude Lookup
Enter an address to find the latitude and longitude
Department of the Interior
US Department-Interior Library, 1849 C Street Northwest,
Washington, DC 20240, USA
Lakewood
Westwood
Glendale
Lasley
Mar Lee
Harvey Park
Wellshire
Goldsmith
Hampden
Aurora Highlands
S Havana St
S Chambers Rd
Englewood
Mission Viejo
Marston
S Federal Blvd
Cherry Creek State Park
Greenwood Village
Denver Tech Center
Littleton
W Bowles Ave
Kipling Hills
Columbine Valley
E Arapahoe Rd
S Parker Rd
Columbine
Southglenn
Centennial
Centennial Airport
Columbine Hills
Acres Green
Highlands
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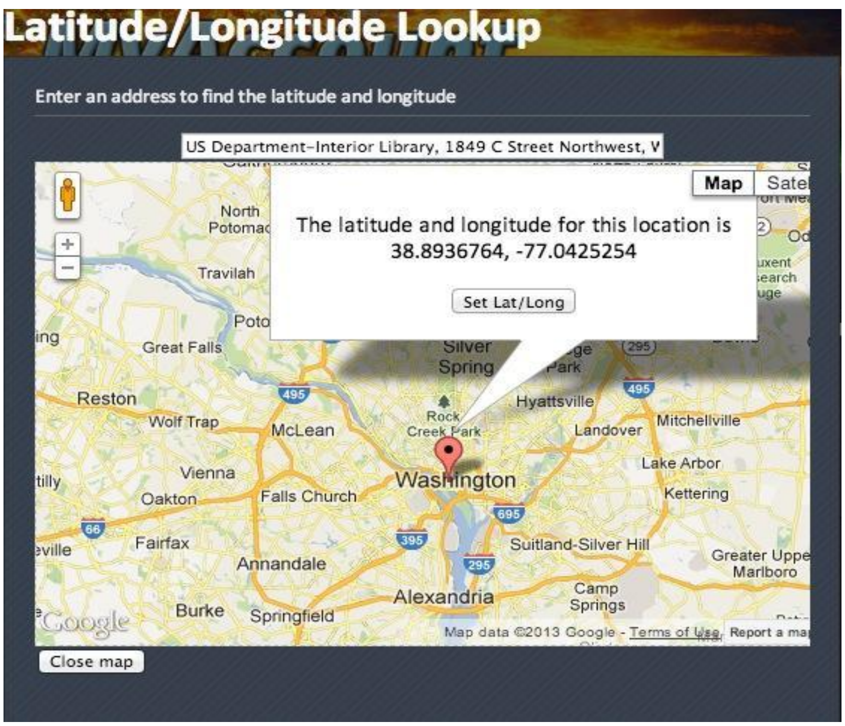
Close map


Latitude/Longitude Lookup
Enter an address to find the latitude and longitude
US Department-Interior Library, 1849 C Street Northwest, V
Map
The latitude and longitude for this location is
38.8936764, -77.0425254
Set Lat/Long
North Potomac
Travilah
Great Falls
Silver Spring
Reston
Wolf Trap
McLean
Rock Creek Park
Hyattsville
Landover
Mitchellville
Vienna
Washington
Lake Arbor
Oakton
Falls Church
Kettering
Fairfax
Suitland-Silver Hill
Annandale
Greater Upper Marlboro
Alexandria
Camp Springs
Burke
Springfield
Map data ©2013 Google - Terms of Use
Close map

Group Lookup

If you want to know who's in a specific email distribution list across all Bureaus, and which lists you are in, then use our new Group lookup. Here's how:

- Log into https://myaccount.doi.gov/ using the same username and password you use to login to your computer
- Click on "Distribution Groups" icon
- See the list of email distribution groups in which you are a member
- Click on the group name to see the members
- To search for a group, use the search box to find a group and then hit 'Enter' to submit

If you are a manager of a group, you will be allowed to make changes to that group's membership.