

USDA LABOR-MANAGEMENT FORUM

Metrics Report Template
For
USDA Labor-Management Forums

Date	
Agency Name	
Sub-Agency (if applicable)	e.g., Western Regional Office
Union Name	
Forum Level (recognition, agency, mission area, other)	If “other”, please describe
Name, title, email address, and telephone number of lead union representative	Joseph Jobs, President AFEU, Local 123 joe.jobs@usda.gov (410) 555-1234
Name, email address, and telephone number of lead agency representative	Samuel Service, Regional Manager sam.service@usda.gov (410) 555-2468
<u>PDI Initiatives (Start 2014 of Reporting Year)</u>¹	<ol style="list-style-type: none"> 1) Reorganization of Office B and C 2) Changes to Official Duty Station for Teleworking Employees 3) Impact of Consolidation of Widget X on Field Employees 4) Changes to Work Schedules
<u>PDI Initiatives (Close 2014 of Reporting Year)</u>²	

¹ Lead Management & Union Rep will list all the PDI initiatives the parties anticipate engaging in during the reporting year. The parties must list and engage in more than 3 PDI initiatives to qualify for the 5 point scoring on the Secretary’s Cultural Transformation (CT) Report Card) at the close of the reporting year.

² Lead Management and Union rep will list all the PDI initiatives which were offered and/or engaged in during FY 2013, and the result. Labor may list all PDI initiatives it requested to engage in, whether or not PDI was offered by Management for a particular initiative. The parties must have engaged in more than 3 PDI initiatives to qualify for the 5 point scoring on the Secretary’s Cultural Transformation (CT) Report Card) at the close of the reporting year.

Metrics ³	Issues ⁴	Elements	Baselines ⁵	Goals ⁶	End of Year Progress ⁷
Labor-Management Relationship	1. The forum has no governance documents or training in collaborative problem-solving	Organizational Support for Labor-Management Relations	Use 2013 survey results from the Online USDA Labor Relations Climate Assessment	Increase the score in the Organizational Support element to an agreed percentage as measured by the fall 2014 Online USDA Climate Assessment	
Employee Satisfaction and Engagement	The number of employees approved for participation in telework is low	Work/Life	Use 2013 survey from OPM's Employee Viewpoint Survey	Decrease the percentage of employees not allowed to telework by agreed percentage	

³ There are three (3) metric categories that measure forums' performance: 1) Labor-Management Relationship; 2) Employee Satisfaction and Engagement; and 3) Mission and Service Delivery. Each metric category is composed of several sub-elements. For detailed information about metric category and their elements, please refer to "*Guidance for Implementing Metrics Requirements For Evaluating Effectiveness of Labor-Management Collaborations Under Executive Order 13522*", dated 11/01/2010.

⁴ Issues are the problems, situations, or conditions forums will work to improve. Issues selected for improvement must be decided upon jointly by union and management forum participants. After deciding on at least one issue for each metric category, forums will use their judgment to match the issue with an associated element in each metric category.

⁵ Baselines for the Labor-Management Relationship metric are taken from the most recent Online USDA Labor Relations Climate Assessment Survey. Baselines for the Employee Satisfaction and Engagement metric are derived from the appropriate question(s) from OPM's most recent Employee Viewpoint Survey for the appropriate USDA agency, sub-agency, or staff office. Baselines for the Mission and Service Delivery metric will come from the appropriate performance measure in the USDA Strategic Plan (FY 2010-2015) or other measurement agreed upon by the parties.

⁶ Goals are the levels of improvement forums will try to reach by the close of the reporting year. Goals must be developed jointly by union and management forum participants. Goals should be specific, measurable, achievable, relevant, and time-bound. However, the specific plans of action or steps agreed to by forums for achieving their goals should not be included in this report. When establishing a "goal" for the Mission and Service Delivery Metric, it is understood that achieving the goal might be a shared effort between various agency forums and/or between one or more USDA agencies or staff offices. In such cases, forums should use their judgment to apportion their share of the goals established in the USDA Strategic Plan (FY 2010-2015) for both determining their baselines and their goals.

⁷ Progress is measured in terms of "achieved" or "not achieved" with a brief explanation of results if the parties desire.

Mission and Service Delivery	Delivery of financial assistance to customers needs to be accelerated	Process/Cycle Time	2.1 Billion in benefits delivered in 2013 as determined from the USDA Strategic Plan FY 2010-2015	Increase in benefits delivered in 2014 by agreed amount	
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Signatures of LRO & Designated Union Representative for Agency-Level Forum⁸

SAMPLE

⁸ Agency level forums must submit a jointly endorsed Metrics & Goals Report at the start and close of every reporting year, and a jointly endorsed Cultural Transformation (CT) PDI initiative report every quarter throughout the reporting year. All reports may be submitted electronically to the designated Labor Relations Specialist within the Department's Labor Relations Program Office. The quarterly PDI initiative report may be submitted in any format that the parties agree to, provided that the report clearly indicates that it is being submitted jointly, and that the parties agree to the accuracy of all information contained in the report. If any report is submitted without the required signatures, the report will be rejected and the agency will not receive recognition for its PDI and/or Forum Metrics & Goals on the Secretary's CT Report Card. Continued failure to submit a quarterly PDI initiative report or Metrics & Goals Report will be reported to the respective Agency Administrator by the USDA Chief Human Capital Officer for follow-up action.