

HUMAN CAPITAL MANAGEMENT REPORT (HCMR)

FY 2012

SMITHSONIAN INSTITUTION

INTRODUCTION


Agency Name	Smithsonian Institution (SI)
Point of Contact (POC) for this report	Marty Emory, Manager, Workforce Planning and Performance (WPP), Office of Human Resources (OHR)
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Date	February 19, 2013

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## SECTION 1. HUMAN CAPITAL ENVIRONMENT AT THE SMITHSONIAN INSTITUTION

Please respond to the following set of questions about human capital management in your agency. For yes or no questions, please answer yes or no AND provide an answer for every question.

### 1. What are the agency's primary performance goal objectives and how did Human Capital/Human Resources (HC/HR) programs support the outcomes?

The Human Capital/Human Resource Programs that demonstrated the most impact on the Smithsonian Objectives are the following:

- a. Smithsonian National Fundraising Campaign and Office of Advancement/ Development Hiring Project. Hired experience Fund Raising/Advancement Professionals to support the Smithsonian's FY 2012 National Campaign. 40 Professionals hired in different specialties of Advancement and the targeted fundraising goals were exceeded in FY 2012.
- b. National Museum of African American History and Culture (NMAAHC) Hiring Project. Hired experienced staff to support the opening of the NMAAHC. Twenty-three professionals for various positions as Objects Conservator, Financial Management Specialist, Education Specialist, Registrar, Visual Information Specialist, Public Affairs Specialist, Museum Technician, Project Manager, Museum Specialist, Management Support Assistants, Collections Manager, Senior Advancement Specialist, and Associate Director for Constituent and Community Services. Met Hiring Target.
- c. End to End Recruiting Practices. The emphasis on hiring talented professionals in a timely manner has been felt across the Smithsonian. Hiring Managers and Human Resource Professionals are in a partnership to expedite all the hiring steps to bring talented professionals onboard.
- d. Palmer Leadership Development Program (PLDP). The competitively selected Federal and Trust Employees (GS/IS 13-14) in this leadership development program participated in Under Secretary-directed Management Projects, had executive mentors, experienced cross-Institution rotations, and discussed Smithsonian issues with Smithsonian Senior Leaders and Smithsonian National Board Members.

### 2. What are the 3 major challenges your agency faces in the next fiscal year? And how will you use human capital to address those challenges.

- a. Decrease in Federal Funding. This reduction impacts operational programs, facilities management, and staffing levels. If Administrative Furloughs are implemented to reduce the budget levels, the Office of Human Resources (OHR) will coordinate all the personnel issues and actions.
- b. A Knowledgeable and Competent Financial Management (FM) Staff. The Office of Human Resources has the lead on implementing the use of Moodle, an online learning tool that will facilitate the learning of financial management professionals on targeted financial subjects.
- c. Smithsonian National Fundraising Campaign. The Office of Human Resources will continue to expedite the recruiting process for Advancement/Development Specialists.

### 3. What are the 3 major HC/HR challenges that the agency faces in the next 2-5 years?

- a. Staffing the National Museum of African American History and Culture (NMAAHC) with competent, proactive, and forward thinking professionals that will assist in the facilitation of creating a national museum that engages new audiences and collaborates with a myriad of museums and educational institutions, both nationally and internationally.
- b. Recruit and hire talented Executives/Senior Leaders with financial restrictions.
- c. Potential for continued annual Administrative Furloughs in the outyears.

### 4. The Smithsonian's leadership understands the relationship between human capital results and Smithsonian performance goal achievement.

- a. There are always Human Capital Goals included in the annual Smithsonian Performance Goals that support the mission and the SI Strategic Goals and Priorities as published in the SI Strategic Plan—SI Strategic Plan: Inspiring Generations Through Knowledge and Discovery FY 2010-2015: “Smithsonian Enterprise Goal 6.0-Mission Enabling: Optimize SI assets by sustaining physical infrastructure, information technology, capabilities and human capital.” Specifically, “Goal 6.2: Attract, maintain, and optimize a productive motivated and creative workforce representative of the nation’s diversity with the competencies needed to deliver maintained levels of excellence. Ensure that new and current employees possess the competencies required to be successful in their jobs and are performing those responsibilities successfully in an inclusive environment with a sense of community, quality of workforce and collaborative problem solving as modeled in the principles of SI Redesign.”
- b. The Smithsonian Employees are one of the main reasons for continued mission performance—their engagement in their jobs and in their mission. The Smithsonian Institution is ranked #3 in the Best Places to Work in the Mid-Size Category.
- c. The participants and graduates from the Smithsonian’s Palmer Leadership Development Program (PLDP) are key players in cross-Institution Working Groups—they tackle Smithsonian mission area concerns; assist in rollout of new programs; and are potential successors of the next generation of leaders at the Smithsonian.

**5. The Smithsonian uses human capital as a tool that drives defensible decision making.**

- a. **If yes, please identify the human capital data currently being used at the Smithsonian.**
  - The Human Resource Business Partners present annual individualized and targeted State of The Unit (SOTU) briefings to the leaders of the Smithsonian museums, research centers, and offices. The collected information and data includes Employee Turnover analysis; projected Retirement Eligibility; and Workforce Data Profile-gender, age, diversity, etc. so that Unit leaders can make data-based decisions on current human capital issues and strategies.
  - The Smithsonian offered Voluntary Early Retirement Authority (VERA) to eligible employees during FY 2011-2012 based on organizational restructuring and budgetary issues.
- b. **The human capital data that the Smithsonian currently uses improves outcomes and helps the Smithsonian achieve its goals.**
  - Human Capital data that includes the Number of Trust and Federal Employees and the Time to Hire Demographics are part of the official Smithsonian Dashboard.
  - The Smithsonian Factbook includes information on the number of Federal and Trust employees; U.S. and worldwide distribution of employees; occupational distribution; length of service; education levels; number of Federal Veterans; race/ethnicity; & Senior and Non-Senior Performance ratings.
  - Annual human capital data is provided to Smithsonian leaders via State of The Unit (SOTU) briefings that include information and data on Employee Turnover analysis; projected Retirement Eligibility; and Workforce Data Profile-gender, age, diversity, etc.

**SECTION II. PLANNING, IMPLEMENTATION, AND EVALUATION OF THE HUMAN CAPITAL LIFE CYCLE**

The Human Capital life cycle of planning, implementing (HCM) programs, and evaluating for results provides a continuous framework for the achievement of major program outcomes and process improvement.

**STRATEGIC ALIGNMENT.** Agency Human Capital Management (strategies are aligned with mission, goals, and organizational objectives and integrated into its strategic plans, performance plans, and budgets).

Criteria includes: Human Capital Planning, Workforce Planning, and Metrics and Evaluation.

HUMAN CAPITAL/ HUMAN RESOURCES (HC/HR) PROGRAMS/ INITIATIVES	PLANNING	IMPLEMENTATION	EVALUATION AND OUTCOMES	NEXT STEPS	OUTCOME ALIGNMENT WITH AGENCY MISSION
Human Capital Goals included in Smithsonian's Annual Operational Goals and the Budget	Partner with SI leadership for the development of Human Capital Goals as part of overall FY 2012 Smithsonian's mission and operational goals. Goals, Expected Outcomes, and Results published on PRISM, the internal website.	Smithsonian Enterprise Goal 6-Mission Enabling: <u>Optimize SI assets by sustaining physical infrastructure, information technology, capabilities and human capital.</u> <ul style="list-style-type: none"> <li>• Goal 6.2: Attract, maintain, and optimize a productive motivated and creative workforce representative of the nation's diversity with the competencies needed to deliver maintained levels of excellence. Ensure that new and current employees possess the competencies required to be successful in their jobs and are performing those responsibilities successfully in an inclusive environment with a sense of community, quality of workforce and collaborative problem solving as modeled in the principles of SI Redesign.</li> </ul>	Goal Numbers are tied to Resource Management (RM) and budget codes. Human Capital Goals met as part of the Annual Performance Review by Smithsonian Senior Leadership. Human Capital Goals, Outcomes, and Results published on a Smithsonian SharePoint site. Process includes a top down and bottom up approach to defining goals and objectives. Target met.	Continue the process for next fiscal year.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities-- Enabling our Mission through Organizational Excellence
Smithsonian Human Capital Strategic Plan FY 2011-1016	Monitor objectives and activities for alignment with Smithsonian Human Capital Strategic Plan FY 2011-2016.	Track the goals, objectives, and activities of the FY 2011-1016 Smithsonian Human Capital Strategic Plan. Goals include: <ol style="list-style-type: none"> <li>1. Align human capital systems with the Smithsonian mission, objectives, and strategies.</li> <li>2. Enrich the Talent Management System by hiring, retaining, and developing talent professionals to achieve the goals of the Institution and deliver sustained levels of excellence.</li> <li>3. Transform the culture to a results-oriented Performance Management culture.</li> <li>4. Foster an organizational environment that encourages an inclusive workforce to achieve</li> </ol>	Target met. Many stakeholders across the Smithsonian assist in participating and meeting the human capital goals, such as SI leaders, managers, Unit directors, supervisors, organizational units, and employees.	Update the Strategic Human Capital Plan based on Smithsonian annual Operational Goals and report results.	Alignment with Smithsonian Strategic Plan FY 2010-2015

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		<p>its professional goals and is representative of the nation's diversity.</p> <p>5. Develop leaders and talent employees at all levels of the Smithsonian to help achieve operational success through engagement, collaboration, innovation, and creativity.</p> <p>6. Ensure that all human capital processes, policies, and practices are audited, evaluated, and held to the highest of best practice standards and federal regulations.</p>			
Alignment and the Cascading of Human Capital Goals	Ensure that there is alignment and the cascading of Human Capital Goals as documented in annual Performance Plans.	<p>Goals cascaded from the Secretary to the Under Secretary of Finance and Administration (USFA) to the Director, Office of Human Resources (OHR), and the Director, Office of Equal Employment Opportunity and Minority Affairs (OEEMA).</p> <p>6.2.1. Provide mandatory supervisory training (Level 1) for first time supervisors as a fee for service (unless central funds are identified to support the effort).</p> <p>6.2.2. Smithsonian Leadership Development Program (SLDP) (Level 3) Program continues with donor funding.</p> <p>6.2.3. Mentoring Program (Level 1)- Institutionalize an annual Mentoring Program based on the previous pilot program, incorporating recommendations from the evaluation of the pilot.</p> <p>6.2.4. Provide technical training sessions to Financial Management (FM)/ Human Resources (HR)/ Information Technology (IT) professionals based on the competency gap analysis for their fields of knowledge.</p> <p>6.2.5. Continue to build, implement, and manage a competency assessment and management program leveraging existing ad hoc efforts (HR, FM, IT) completing 12% of the Smithsonian Professional Competency Framework and linking to Redesign efforts.</p>	100% of goals cascaded as documented in annual Performance Appraisals at multiple levels. Target met. Projects tied to SI leadership and management performance plans.	Continue the process for next fiscal year.	Alignment of the Smithsonian annual organizations based on the SI Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through Organizational Excellence

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		<p>6.2.6. Assist the Development/ Advancement family in defining career requirements and recommendations.</p> <p>6.2.7. Assist in the development of a competency framework and draft a learning strategy for the Exhibitions Services linking to Redesign efforts.</p> <p>6.2.8. Expand technology to aid occupations and occupational groups in tracking required and recommended training, and link that training to established competency sets where possible.</p> <p>6.2.9. Meet or exceed 4 of 6 Smithsonian Supplier Diversity Goals, achieve at least 80% Equal Employment Opportunity (EEO) training compliance and improve involvement of underrepresented groups on decision making boards, committees, and in Senior Level (SL) positions.</p> <p>6.2.10. Promote the improvement of the SI Workforce Diversity Profile (by race/ ethnicity and by gender) by creating at least one new outreach initiative focused on an underrepresented group.</p>			
Transparency of Smithsonian data SI Goal 7.1.1	Present and track data and demographics and display information for access.	<ul style="list-style-type: none"> <li>Submitted current human capital demographics to SI Dashboard at scheduled time periods.</li> <li>Developed visual display of human capital demographics for use in SI presentations.</li> </ul>	<ul style="list-style-type: none"> <li>Number of Trust and Federal Employees and Time to Hire Demographics included in the SI Dashboard.</li> <li>Presentation includes FY demographics of—number of Federal and Trust employees; U.S. and worldwide distribution of employees; occupational distribution; length of service; education levels; number of Federal Veterans; race/ethnicity; &amp; Senior and Non-Senior Performance ratings.</li> </ul>	Continue in FY 2013.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities-- Enabling our Mission through Organizational Excellence
Human Capital Accountability Policy, Program, Guide linked	Link Smithsonian Human Capital Accountability documents to SI Strategic Plan, Strategic Priorities,	Updated Smithsonian Human Capital Accountability Policy and Program and Smithsonian Institution Accountability Guide	Smithsonian Human Capital Accountability Policy and Program and Smithsonian Institution Accountability	Update and tailor to Smithsonian	Alignment with Smithsonian Strategic Plan FY 2010-2015 and

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to SI Strategic Plan	and Grand Challenges.	(SIAG) to the language and themes of the SI Strategic Plan, Strategic Priorities, and Grand Challenges. Also include all Hiring Reform Requirements.	Guide (SIAG) revised (August 2012) according to guidelines, new Hiring Reform Requirements.	Human Capital practices in FY 2013.	its Strategic Priorities-- Enabling our Mission through Organizational Excellence
Human Capital Strategies Communicated to the Smithsonian Museums, Research Centers, and Offices. Workforce Planning Strategies included in the State of the Unit (SOTU) briefings	State of the Unit (SOTU) Briefing Template. Develop a template to update and discuss human capital issues with the Smithsonian museums, research centers, and offices to be briefed by Human Resources (HR) Business Partners (BP) for Unit-specific information.	Standardized format included: <u>Roles and Responsibilities</u> of first line supervisors, managers, and Human Resource Business Partners; <u>Workforce Data</u> to include Employee Turnover Analysis, Retirement Eligibility, & Workforce Data Profile; <u>Workforce Management</u> to include Recruitment Planning and Hiring Incentives; <u>Current Events</u> ; <u>Workforce Management Performance</u> to include Smithsonian Employee Perspective Survey (SEPS) results, Performance Plans and Appraisals, Employee Recognition; <u>Helpful Resources</u> ; and <u>Points of Contact</u> (POCs).	These are extremely successful meetings between the Units and the Office of Human Resources and mutually beneficial. 27 Units leadership teams received annual briefings.	Continue annual briefings.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities-- Enabling our Mission through Organizational Excellence
Human Resources (HR) as a Strategic Partner in Smithsonian Leadership and Management Arenas	Continue to develop and strengthen technical and functional relationships with SI Leadership, Unit Directors, Managers, and Employees.	Participated in Work Groups, Leadership Meetings, Staff Meetings, etc.	HR staff included in Finance and Administration Management Team (FAMT) [Cross-Institution Administrative Group]; Directive Management Review (DRM) [Cross Institution Group for Smithsonian Directives, Policies, and Guidance]; and Business Partner Consultation to the Units on HR issues. Target met.	Continue the successful business process.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities-- Enabling our Mission through Organizational Excellence
Human Resource Team Approach for Customer Service	Develop a systems approach to Customer Service for HR managers and employees.	Developed a HR Team for each Unit that includes a HR Specialist for Recruitment, Business Partner, and Benefits. Units have an HR Team that is identified on the OHR website for a more inclusive approach to HR services.	HR Teams identified and names and phone numbers are published on the OHR website. 100% implemented.	Continue the process.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities-- Enabling our Mission through Organizational Excellence
Voluntary Early Retirement Authority (VERA) Used as a Workforce Planning Strategy	Request permission from OPM for the use of VERA for FY 2011-2012 as a workforce management tool based on budget constraints and mission changes.	Permission received in May 2011. Early Retirement authority lasted until December 2012.	Target met.	Continue to monitor and report on VERA data to OPM.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities-- Enabling our Mission through Organizational



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					Excellence

Please answer these additional Workforce Planning questions.

1. Does your agency have a governing body (e.g., Executive Steering Committee) that establishes and maintains a governance structure for coordinating resources and services between the Chief Human Capital Officer (CHCO), Chief Financial Officer (CFO), Chief Learning Officer (CLO), Chief Information Officer (CIO), etc.

The Offices of the CFO, CIO, and the Director of the Office of Human Resources all fall under the Under Secretary for Finance and Administration (USFA) and work together as a team approach for resources. The museums and research centers fall under the Under Secretary for Art, History, and Culture and the Under Secretary for Science. Resources to support these Under Secretaries have to be coordinated at the Under Secretary level.

2. Does your agency have a corporate Workforce Planning Method?

The Smithsonian does not have a corporate Workforce Planning Method, it has Unit-specific Workforce Planning methodology, because Workforce Planning Strategies are primarily projected and managed at the Unit (museum, research center, and office) level. This is due to the uniqueness of the mission areas of the museums, research centers, and offices. As an example, an art curator at the Hirshhorn Museum (modern art) is very different from an art curator at the Freer-Sackler Gallery (Asian Arts); and a biologist at the National Museum of Natural History (NMNH) is very different than a "big cats" specialist at the National Zoological Park (NKP) so an enterprise and structured approaches for workforce priorities are not always the most useful approaches. The Units are the most informed about their priorities for workforce planning and development. In addition, the Office of Human Resources (OHR) Business Partners (BP) and the Units' BPs assist in developing workforce planning tools, models, and strategies for the Units to use for their workforce priorities.

3. If yes, is there a governing body that coordinates decisions and resources?

The Smithsonian does not have a governing body that coordinates decisions and resources, but it does have the Finance and Administrative Management Team (FAMT), where resources and administrative policies and practices are discussed.

4. Are you able to project the percent of the workforce (or eligible) to retire in the next fiscal year? If yes, please indicate percentage/numbers expected to retire within the next fiscal year.

Smithsonian Federal Employees only—

Numbers--

- 1 Leadership (Senior Level)
- 20 Management (Managers, Supervisors)
- 30 Non-Supervisors

5. Please indicate percentage/numbers expected to retire within 2 to 5 years.

Smithsonian Federal Employees only—

Numbers--

- 2 Leadership (Senior Level)
- 80 Management (Managers, Supervisors)
- 150 Non-Supervisors

6. Please indicate how your agency planning (workforce planning, succession planning, recruitment, etc.) is helping your agency prepare for these retirements.

The Smithsonian Museums, Research Centers, and Offices receive individual briefings from Human Resource Business Partners on the following topics that include specific demographic data for each organization.

- Employee turnover analysis
- Retirement eligibility for Federal and Trust employees
- Reasons for retirement
- Workforce Profile
- Demographics according the Civilian Labor Force (CLF) classifications for all employees
- Gender demographics for all employees
- Recruitment Initiatives
- Types of Recruitment Authorities and Appointments
- Types of bonus incentives
- Veterans preference compliance
- Sources to increase diversity
- Current Human Resource personnel actions

**LEADERSHIP AND KNOWLEDGE MANAGEMENT.** Focuses on identifying and addressing agency leadership competencies so that continuity of leadership is ensured, knowledge is shared across the organization, and an environment of continuous learning is present.

Criteria includes: Succession Planning, Continuous Learning, Knowledge Management Strategies, and Leadership Development.

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<p>“Fundamentals for Supervisors” Course [Level 2 Leadership] SI Goal 6.2.1</p>	<p>Present “Fundamentals for Supervisors” for new supervisors to meet the requirements of Code of Federal Regulations (CFR) 412.</p>	<p>Presented 2 Pilot Programs for “Fundamentals for Supervisors” to obtain feedback for course content and delivery styles.</p>	<p>Five day curriculum included Supervisor roles, leadership development, performance management, coaching, recruitment authorities and appointments, labor and employee relations, leave and pay issues, career development and planning for employees, etc.</p>	<p>Target and contact all new supervisors for participation in course</p>	<p>Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities-- Enabling our Mission through Organizational Excellence</p>
<p>Palmer Leadership Development Program (PLDP) [Level 3 Leadership] SI Goal 6.2.2</p>	<p>Design and implement Project Management Plan for PLDP that includes application and selection processes, action learning experiences and activities, and requirements for graduation based on the recommendations of the previous Smithsonian Leadership Development 2.0.</p>	<p>Leadership Development Program renamed based on funding from Smithsonian National Board Members. Designed and implemented Project Management Plan for PLDP that included application and selection processes, action learning experiences. Mid-Program Report completed.</p>	<p>Mid-Program Report completed. All PLDP participants on target for completion of Level 3 Leadership Program that included a rotation, mentor, Management Project, and action learning activities. 100% Target Met.</p>	<p>Graduation in December 2012. Kirkpatrick Level 2 evaluation completed and new class inaugurated in spring 2013.</p>	<p>Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges-- Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence</p>
<p>Smithsonian Mentoring Program [Level 1 Leadership] SI Goal 6.2.3</p>	<p>Design and implement Project Management Plan for Smithsonian Mentoring Program that includes application and selection processes, mentoring relationships, and action learning experiences and activities, based on the recommendations of the previous Smithsonian Mentoring Program.</p>	<p>Designed and implemented Project Management Plan for Smithsonian Mentoring Program that included application and selection processes, mentoring relationship activities, and action learning experiences. Mid-Program Report completed.</p>	<p>Mid-Program Report completed. 23 of 25 participants on target for completion of activities for graduation. [Level 1 Leadership] Target Met.</p>	<p>Graduation in December 2012. Kirkpatrick Level 2 evaluation completed and new class inaugurated in FY 2013.</p>	<p>Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges-- Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and</p>

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					Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Financial Management (FM) Curriculum SI Goal 6.2.4 SI Goal 5.2.4	Develop and present Smithsonian Basic Financial Management course.	Presented Financial Management (FM) course based on requirements of Booz-Allen study and improved Internal Controls.	FM Pilot Course developed and presented. Target Met with assistance from the FM and OHR communities.	Deploy online Smithsonian Basic Financial Management Course in FY 2013 that can be used as a model for future online courses.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities—Enabling our Mission through Organizational Excellence
Human Resources (HR) Business Partners (BPs) Development of Skills and Knowledge SI Goal 6.2.4 SI Goal 6.2.5	Implement a learning strategy for newly hired HR BPs.	BP Learning Curriculum emphasized strategic, operational, technical, and general skill-building capabilities: <ul style="list-style-type: none"> <li>• HR Business Partner (HRBP) Collaborative Training</li> <li>• BP Boot Camp Training</li> <li>• SI BP training on various HR programs/policies</li> <li>• Advance Position Classification</li> <li>• Federal Staffing and Placement-Federal Staff and recruiting practices</li> <li>• OPM Best Practices to Hire Veterans</li> <li>• OPM Professional Development Supervisors and Managers</li> <li>• Peace Corps Training—Hiring Opportunities/ Strategies for Return Peace Corps Volunteers</li> <li>• Prevention of Workplace Harassment (POWH)</li> <li>• Becoming a Strategic Business Partner</li> <li>• Enterprise Resource Planning-Human Resource Management System (ERP-HRMS) for Unit Administrators</li> <li>• Uniformed Services Employment and Reemployment Act (USERRA)</li> </ul>	Implemented a yearlong training and employee development for Business Partners. Target met, but there were turnovers and new hires will need additional training.	Expand training program for all human capital areas for BPs	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence

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		<ul style="list-style-type: none"> <li>• Leading the Generations</li> <li>• Job Analysis and Competency Assessment Training</li> <li>• Initial SI Safety Orientation</li> <li>• Ergonomics</li> <li>• Federal Workforce Analysis and Planning</li> <li>• Non-Resident Alien Tax Compliance</li> <li>• Slips, Trips, and Falls</li> <li>• Supervisory Safety</li> <li>• Government Trip Document Preparation</li> <li>• Re-Inventing Diversity for the 21<sup>st</sup> Century</li> </ul>			
Develop a Career Development Strategy for the Advancement/ Development Community SI Goal 6.2.6	Develop a competency model for Advancement/ Development community and assist with the deployment of training and learning strategies.	Developed a draft General Competency Model for the Development/ Advancement community based on Public Affairs positions. Began discussion with the community.	Competency Model needs vetting and approval, but was postponed waiting the hiring of a Training Manager. Target partially met.	Advancement occupation will be hiring a Program Manager to develop and implement a learning curriculum in FY 2013. Education Learning Strategy rollout Phase II planned for FY 2013.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges-- Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience
Develop a Career Development Strategy for the Exhibitions Services Community SI Goal 6.2.7 SI Goal 7.1.7	Develop a competency model for Exhibition Services community and assist with the deployment of training and learning strategies.	No work was performed on this strategy due to the waiting of a new Director to lead the efforts in this area.	Target not met. Postponed indefinitely.	Awaiting direction and guidance for development and implementation of strategy.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges-- Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience
SI Training Technology Improvement SI Goal 6.2.8	Develop a platform that assists occupational groups in tracking training requirements based on competency-based learning.	Developed Career Path Technology through a partnership of Office of Chief Information Officer (OCIO); Office of Human Resources (OHR); and the Office of	Populations that are now being tracked through Career Path are Supervisors, Advancement/ Development, Trade & Safety	<ul style="list-style-type: none"> <li>• Expand Career Path to technology to FM community.</li> </ul>	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--

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		Facilities, Engineering, and Operations (OFEO).	populations.	<ul style="list-style-type: none"> <li>Implement Moodle technology for SI Training Courses.</li> </ul>	Enabling our Mission through Organizational Excellence
Enhanced Education Specialist Learning Curriculum SI Goal 3.3.1	Develop and present professional learning opportunities for museum education specialists.	In collaboration with six Smithsonian units, Smithsonian Center for Education and Museum Studies (SCEMS) conducted 7 New Learning Institutes.	Content focused on digital learning content to expand Education Outreach initiatives. Target met.	Continue Education Specialist Learning Curriculum.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Executive Leadership Forums [Level 5 Leadership]	Present Executive Forums to address Executive Competencies.	Presented leadership seminars to Executives to expand leadership and management competencies and skills.	None held. Target not met due to other resource commitments.	Partner with other SI Units and Federal Agencies for expanded access for Executive Forums.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Human Resource (HR) Specialist Competency Model	Develop a Human Resources Competency Model for GS/IS 201 and other HR Professionals.	Updated SI's HR Competency model (general and technical) by benchmarking it with OPM's and Health and Human Services (HHS) models and develop an improved model that fits the Smithsonian environment.	Model needed to be revised based on feedback from OHR managers and SAO HR professionals.	Survey GS/IS 201s and HR professionals for skill gaps. Publish results and develop learning strategy.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through Organizational Excellence.
Employee Training Needs Assessment	Develop and deploy an employee learning assessment survey that is benchmarked on training surveys.	Developed a list of questions that assess employee training needs via a SharePoint survey tool; survey deployed in August 2013.	Less than 15% responded to the survey due to the timing of the deployment. Information is more "ad hoc" than statistically valid.	Implement at least 3 recommendations from Survey Tool.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--

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			Timing of future assessments should be at a different time of year and questions reviewed for obtaining relevant information.		Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
<b>Human Capital Accountability</b> FY 2011-2012 Human Capital Management Evaluation (HCME) for Employee Development and Training Practices	Resolve and complete "Required Actions" for Training and Employee Development to annually assess training programs for the effectiveness in meeting mission accomplishments and agency performance goals.	Resolution of Required Actions: <ul style="list-style-type: none"> <li>• SI Training Courses now mapped to SI Strategic Goals.</li> <li>• Annual training needs assessment survey.</li> <li>• "Fundamentals for Supervisors" course stresses the importance of the Individual Development Plans (IDPs) for employees.</li> </ul>	Resolutions accepted by the OPM Merit System Audit and Compliance. Audit closed October 2012.	Monitor and correct discrepancies noted in "Required Actions."	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities—Enabling our Mission through Organizational Excellence



**TALENT MANAGEMENT.** The organization addresses competency gaps, particularly in mission-critical occupations, by implementing and maintaining programs to attract, acquire, develop, promote, and retain quality talent.

Criteria includes: Competency Models, Recruiting and Hiring Initiatives and Programs, Retention, and Talent Management Programs.

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HR Competencies (listed in Leadership and Knowledge Management Section)					
Advancement/ Development Competencies (listed in Leadership and Knowledge Management Section)					
Smithsonian 80-Day End-to-End (E2E) Hiring Model	Develop and implement Smithsonian Hiring Action Plan that focuses on Implementing internal operational practices that decrease time to hire.	Developed and implemented Smithsonian Recruitment Action Plan. Internal recruitment practices included— <ul style="list-style-type: none"> <li>• Developed electronic notifications to Hiring Managers regarding expiration of certificates.</li> <li>• Improved process for Question Library.</li> <li>• Updated Job Analysis Library.</li> <li>• Initiated Clean-up of Position Description (PD) Library to include deletion of duplicate PDs.</li> <li>• Updated and Improved Social Media sites.</li> <li>• Enhanced Vacancy Announcement Templates in Smithsonian Tracking and Applicant Referral System (STARS) to limit the number of applicants.</li> <li>• Initiated New Merit Placement Policy regarding the length of time for the Posting of Announcements and the Duration of Certificates.</li> <li>• Initiated Team Approach to improve hiring process.</li> </ul>	Smithsonian E2E 80-Day Hiring Goal achieved 27.4% of the time. Designated Target met.	Reevaluate Hiring Steps and continue to work toward achieving the E2E 80-Day Hiring benchmark.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Recruitment, Relocation, and	Use Recruitment, Relocation, and Retention Incentives (3Rs) to	3Rs complied with Smithsonian Directive (SD 212), Chapter 575, Recruitment and	Target met.	Monitor for adherence is SD	Alignment with Smithsonian Strategic Plan FY 2010-2015 and

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Retention (3R) Incentives	attract outstanding candidates and retain outstanding Smithsonian employees.	Relocation Bonuses and Retention Allowances. <ul style="list-style-type: none"> <li>• 33—Recruitment Bonuses</li> <li>• 23—Retention Incentives</li> </ul>		212, Chapter 575.	its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Smithsonian Pathways Programs	Develop a Memorandum of Understanding (MOU) and Smithsonian Pathways Programs Guidance.	Drafted a Memorandum of Understanding (MOU) and Smithsonian Pathways Programs Guidance.	<ul style="list-style-type: none"> <li>• Target met.</li> </ul>	Finalize MOU and Guidance and submit to OPM for approval.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Smithsonian Diversity Recruitment and Outreach Program	Develop and implement the Smithsonian Diversity and Outreach Program to encourage talented and diverse professionals to the Smithsonian and increase the diversity of the applicant pools.	Outreach activities and events included: <ul style="list-style-type: none"> <li>• Veterans Career Fair and Exposition at the Washington DC Convention Center.</li> <li>• Job Youth Fair sponsored by Office of Personnel Management (OPM) Chapter of Blacks in Government held at the Prince Georges Maryland Community College.</li> <li>• The Assistant Secretary for Education and Access (ASEA), Office of Equal Employment and Minority Affairs (OEEMA), Office of Fellowships and Interns (OFI), Office of Human Resources (OHR), and Office of Sponsored Projects (OSP) met with representatives from the White House Initiative on Historically Black Colleges and Universities (HBCUs) to discuss their missions, goals and possible collaborations.</li> <li>• “Wisdom Wednesday Workshop” at The Center for Career Education,</li> </ul>	<ul style="list-style-type: none"> <li>• Target met with the assistance of Smithsonian’s museums, research centers, and offices.</li> <li>• Outcomes of the White House Initiative included the Smithsonian sharing its lists of internship, employment opportunities and planned outreach activities; and the White House Initiative making available their selected lists of HBCU administrative officers and faculty.</li> </ul>	Continue Best Practices in Diversity Recruitment and Outreach.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence

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		<p>Development and Research (CEDAR Center) on the Howard University Campus in Washington, DC.</p> <ul style="list-style-type: none"> <li>• Smithsonian’s Internship/Fellowship Workshop at the Founders Library at Howard University in Washington, DC in partnership with the National Museum of African American History and Culture (NMAAHC).</li> <li>• Returned Peace Corps Volunteers (RPCV) Career Fair held at the Peace Corps Headquarters in Washington, DC.</li> <li>• OHR hosted an information session with National Museum of Natural History (NMNH) for Carnegie Mellon University graduate students seeking careers and internships in government, policy, arts and culture, healthcare and biotech management, and information systems technology.</li> <li>• Information Session on the Smithsonian Museum Experiences--The Field of Education Workshop for the Harvard Graduate School of Education cohosted by OHR and museum education specialists and technicians.</li> <li>• AON’s Salute to America’s Wounded Warrior Networking Fair in Arlington, VA.</li> <li>• White House Initiative on Asian-American and Pacific Islanders Conference at the Washington DC Convention Center. OHR hosted and facilitated a recruitment table with SI materials throughout the event, providing information to over 30 participants about employment opportunities and issues surrounding diversity recruitment.</li> <li>• Military Night and Military and Veterans Job Fair at the Washington Wizards Game at the Verizon Center in Washington, DC.</li> <li>• Northern Virginia Community Job Fair in Alexandria, VA.</li> </ul>			

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		<ul style="list-style-type: none"> <li>• Information Session cohosted by OFI and OHR for Wes Erwin, Senior Assistant Director of Employer Relations from Indiana University on student hiring programs and internship/fellowship opportunities.</li> <li>• Conference on Asian Pacific American Leadership (CAPAL) Career Fair in partnership with the National Museum of American History (NMAH) and the Office of Chief Financial Officer (OCFO) held at American University in Washington, DC.</li> <li>• Smithsonian’s 2012 Intern Event and Career Fair—“The Smithsonian: From Here to Career.”</li> <li>• Government Networking Night and Indiana University Fall Career and Internship Fair plus OHR Recruitment Manager participated in a panel on government hiring and the Smithsonian museum world. Held in Bloomington, IN.</li> </ul>			
<b>Human Capital Accountability</b> Delegated Examining Unit (DEU) Authority, Audit, and Review for Smithsonian Astrophysical Observatory (SAO’s Human Resource (HR) Department)	Perform annual DE audits according to the OPM Delegated Examining Unit Handbook and the Smithsonian Institution Accountability Guide (SIAG).	Annual DEU audit was performed by the OPM Philadelphia Oversight, Merit System Audit and Compliance. Resolved “Required Actions”: <ul style="list-style-type: none"> <li>• OHR staff will perform DEU annual audits for SAO in the future.</li> <li>• Carefully document all Job Analysis criteria.</li> <li>• Prepare plainly written Job Offer Announcements.</li> <li>• Document recruitment incentives for superior qualifications and pay setting authorities.</li> <li>• Maintain current Delegated Examining (DE) certifications.</li> </ul>	Resolutions accepted by the OPM Merit System Audit and Compliance. Audit closed June 2012.	Monitor and correct discrepancies noted in “Required Actions.”	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through Organizational Excellence
<b>Human Capital Accountability</b> Delegated Examining Unit (DEU) Authority, Audit, and Review for	Perform annual DE audits according to the OPM Delegated Examining Unit Handbook and the Smithsonian Institution Accountability Guide (SIAG).	Annual DEU audit was performed by the OPM Dallas Oversight, Merit System Audit and Compliance. Resolved “Required Actions”: <ul style="list-style-type: none"> <li>• Non OHR Staff will perform DEU audits in</li> </ul>	Resolutions accepted by the OPM Merit System Audit and Compliance. Audit closed October 2012.	Monitor and correct discrepancies noted in “Required	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through Organizational Excellence

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the Smithsonian's Office of Human Resources (OHR)		<p>the future.</p> <ul style="list-style-type: none"> <li>• Regularized appointment by reissuing Job Opportunity Announcement and selecting the best candidate according to DEU guidelines.</li> <li>• Standard Operating Procedures (SOPs) and checklists written for handling of Status Applicants in the DE process and for Veterans Preference on how to refer for different categories for under 30% compensable; interdisciplinary positions.</li> <li>• SOPs revised for Reemployment List process and timelines; late application process; unsolicited applications from veterans; &amp; passover process.</li> <li>• New Job Announcement template designed to meet Hiring Initiative requirements.</li> <li>• Carefully document all Job Analysis and rating criteria.</li> <li>• Document recruitment incentives for superior qualifications and pay setting authorities.</li> <li>• Ensure legal codes and appointment documentation is correct on all records.</li> <li>• Maintain current Delegated Examining (DE) certifications for all DE staff (Federal and contractors).</li> </ul>		Actions.”	
Quality Veterans Programs	Maintain a multi-approach to recruit, select, hire, and retain American veterans.	<p>Multiple programs included:</p> <ul style="list-style-type: none"> <li>• Career Fairs and Outreach Programs, such as, Veterans Career Fair and Exposition at the Washington DC Convention Center; AON's Salute to America's Wounded Warrior Networking Fair in Arlington, VA.; &amp; Military Night and Military and Veterans Job Fair at the Washington Wizards Game at the Verizon Center in Washington DC.</li> <li>• Uniformed Services Employment and Reemployment Rights Act (USERRA) training for Smithsonian supervisors.</li> </ul>	<ul style="list-style-type: none"> <li>• USERRA Training—93% completion. Target exceeded.</li> <li>• Increased hiring of veterans and disabled veterans (Federal hires): <u># of Veterans hired</u> FY 2011—26 FY 2012—28 <u>% of Disabled Veterans hired</u> FY 2011—8.9% FY 2012—9.9%</li> </ul>	Continue the emphasis on the hiring of veterans for Smithsonian job opportunities.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence

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		<p>Target 85% completion.</p> <ul style="list-style-type: none"> <li>• USERRA course included in the Supervisors Certificate Program.</li> <li>• Began tracking Veteran Hires for Trust positions.</li> <li>• Submitted SI's FY 2012 Disabled Veterans Affirmative Action Program (DVAAP). Highlights included Veteran Career Fairs and Outreach Programs; communication strategies for job openings; veteran hiring practices for supervisors; promotion data on veterans and disabled veterans (12.5% and 4.6% respectively).</li> <li>• Emphasis on hiring veterans and disabled veterans.</li> </ul>	<p><u>Total % of Veterans hired</u> FY 2011—19.1% FY 2012—20.5%</p> <p><u>Number of Veterans at the Smithsonian (Federal)</u> FY 2011—515 FY 2012—521</p> <p><u>Number of Disabled Veterans in Smithsonian population (Federal)</u> FY 2011—101 FY 2012—110</p>		
Smithsonian National Fundraising Campaign and Office of Advancement/ Development Hiring Project	Hire experienced Fund Raising Professionals to support Smithsonian FY 2012 National Campaign.	<p>Hired 39 National Campaign professionals for FY 2012 Smithsonian Fundraising Projects--</p> <ul style="list-style-type: none"> <li>• Advancement Assistants, IS-1001-7</li> <li>• Advancement Associates, IS-1001-9</li> <li>• Advancement Specialist, IS-1001-11</li> <li>• Advancement Program Specialist (Gift Officer), IS-1001-13 and IS-1001-14</li> <li>• Advancement Program Specialist (Donor Relations), IS-1001-13 and IS-1001-14</li> <li>• Senior Advancement Program Specialist (Gift Officer), IS-1001-13 and IS-1001-14</li> <li>• Assistant Director of Advancement, IS-1001-15</li> </ul>	Hired 40 Fundraising qualified and talented professionals to meet target need. Exceeded target. Exceeded FY 2012 Smithsonian Annual Fundraising Goals.	Continue to support Office of Advancement/ Development.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
National Museum of African American History and Culture (NMAAHC) Hiring Project	Hire experienced staff to support the opening of the new NMAAHC.	<p>Hired 23 qualified professionals for the new NMAAHC—</p> <ul style="list-style-type: none"> <li>• Assistant Registrar, GS-1001-9/11</li> <li>• Objects Conservator, GS-1001-11</li> <li>• Visual Information Specialist, IS-1084-9</li> <li>• Public Affairs Specialist, GS-1035-7/9</li> <li>• Management Support Assistants, GS-303-5 &amp; 7; IS 303-7</li> <li>• Museum Technician, GS-1015-5/7</li> <li>• Project Manager, IS-1001-13</li> <li>• Museum Specialist, IS-1016-7/9</li> </ul>	Met targeted goals.	Continue to support NMAAHC as it continues to prepare for its opening.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges-- Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence

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		<ul style="list-style-type: none"> <li>• Financial Specialist, GS-501-13</li> <li>• Education Specialist, IS-1701-7</li> <li>• Museum Technician, GS-1016-7</li> <li>• Supervisory Collections Manager, GS-1001-12/13</li> <li>• Senior Advancement Specialist, GS-1001-13</li> <li>• Associate Director for Constituent and Community Services, SL</li> </ul>			
Smithsonian Orientation Program	Develop a more holistic approach to Onboarding for New Employees. Documents completed before Entry on Duty.	<p>Implemented continuous improvement strategies for New Employee Orientation from a “Forms” Day to an Employee Engagement Day:</p> <ul style="list-style-type: none"> <li>• Included introductory film “Exciting the Learning in Everyone” to enhance employee engagement.</li> <li>• Standardized presentations by SI presenters.</li> <li>• Simplified &amp; reduced the quantity of paperwork, documentation, etc.</li> <li>• Partnered with the Office of Protection (OPS) to obtain Security Badges the first day of employment.</li> </ul>	89% Customer Service Rating (CSR) on the New Employee Orientation.	Expand Orientation Program to an Onboarding Program.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through Organizational Excellence.
The Smithsonian Telework Program	Increase the usage of the Smithsonian Telework Program.	<ul style="list-style-type: none"> <li>• Increased the flexibility of the Smithsonian workforce to maintain Smithsonian operations encouraged more employees to enroll in Telework Program.</li> <li>• Training—“Implementing a Successful Telework Program at SI.”</li> </ul>	<p>Results:</p> <ul style="list-style-type: none"> <li>• FY 2012—582</li> <li>• FY 2011—350</li> <li>• 40% increase in signed Telework agreements.</li> </ul> <p>Other: Information tracked through WebTA; however, not all employees use this method for recording of hours.</p>	Encourage employees to have a signed Telework Agreement to assist in operational flexibility.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Smithsonian Benefits and Compensation Practices	Provide quality policy and program development, evaluation, and communications; and administration of pension, investments, savings, group insurance and statutory benefits	<ul style="list-style-type: none"> <li>• Completed an Electronic Official Personnel File (EOPF) assessment phase to determine the cost of moving to electronic OPF.</li> <li>• Completed a Periodic Roll (PR) Project for Workers Compensation by reviewing 90</li> </ul>	<ul style="list-style-type: none"> <li>• Costs recovered/avoided on the Workers Compensation Project have exceeded the cost of the contract.</li> <li>• Electronic CA-2 Filing</li> </ul>	Continue to offer special activities and programs that add to employee	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Enabling our Mission through Organizational Excellence

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	for Federal and Trust Fund employees.	<p>plus cases on PR's to determine potential for return to work).</p> <ul style="list-style-type: none"> <li>• Developed a formal Return to Work Process which integrated all units.</li> <li>• Conducted Open Season Benefits Fair with an emphasis on Health Issues and Healthy Life Style.</li> <li>• Implemented Electronic CA-2 Filing for a SI-wide rollout.</li> <li>• Provided training on continuation of pay to supervisors.</li> <li>• Conducted employee focus groups on Employee Benefits Communication effectiveness and implemented suggested changes where possible.</li> <li>• Delivered Financial Planning and Retirement Seminars to Smithsonian Federal and Trust employees.</li> </ul>	<p>Project completed on time and according to guidance.</p> <ul style="list-style-type: none"> <li>• Delivered five types of financial planning and retirement workshops to 140 Federal and Trust employees for a 94% Customer Service Rating (CSR).</li> </ul>	engagement.	
Quality Employee Assistance Program (EAP)	Provide support and counseling assistance to SI employees for emotional wellbeing.	<ul style="list-style-type: none"> <li>• Provided 20 Civility Program Presentations to all levels of SI employees.</li> <li>• Provided 14 work life presentations (e.g. telework, grief and loss, coping with suicide, etc.).</li> </ul>	Civility Program implemented as a Best Practice in the Workplace.	Continue to offer high quality counseling assistance and training programs.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Smithsonian Health and Wellness Programs and Smithsonian Community Activities	Maintain a work environment that encourages a healthy balance of work life activities.	<p>The Smithsonian Community Council and Smithsonian Units provide learning opportunities, volunteer experiences, and health-focused programs to Smithsonian employees. These include:</p> <ul style="list-style-type: none"> <li>• Wellness Program—Flu vaccine, blood donation opportunities, “Live Well in 2012”; “Understanding Grief and Loss”; “Understanding Cardio-Vascular Disease”; “Open House for Weight Watchers “At Work” Program”; &amp; Smithsonian Happy and Active Program</li> </ul>	Presented whole specter of programs (wellness and community activities) and approved by SI leaders.	Continue to offer work life programs for Smithsonian employees and encourage healthy life style behaviors.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence



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		<p>for Employees (SHAPE) walks.</p> <ul style="list-style-type: none"> <li>• Volunteer Activities—Folklife Festival; Heritage &amp; Cultural Month Programs; Smithsonian Quilt Panel for Folklife Festival.</li> <li>• Staff picnic during Folklife Festival.</li> <li>• Discount tickets for MAX theatres.</li> <li>• Specially interest programs—“National Public Garden Day in the Smithsonian Gardens”; “Behind the Scenes Tour of 2012 Folklife Festival”; &amp; “Art Thefts”.</li> <li>• Learning Opportunities—“Civil Matters: When Do I Really Need a Lawyer and When Do I Not?”</li> <li>• Special interest programs and events--presentations by Smithsonian Gardens staff on subjects of interest to home gardeners.</li> <li>• Curator led exhibition tours for SI staff.</li> <li>• Family staff nights at Smithsonian theaters.</li> <li>• Staff tours of local exhibitions at non SI museums.</li> <li>• Speakers on a variety of subjects by Smithsonian staff members such as digital photography, Mars Rovers, and holiday etiquette.</li> <li>• Employee showcase events - bi annual employee art and photography shows.</li> </ul>			

**PERFORMANCE CULTURE.** The organization promotes a diverse, high-performing workforce by implementing and maintaining effective performance management systems and awards programs.

Criteria includes: Performance Management Practices, Labor and Employee Relations Programs, and Diversity Programs.

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Equal Employment Opportunity (EEO) Training Compliance SI Goal 6.2.9	Track and record employee participation for EEO courses for compliance.	Target compliance rates for participation and completion of compliance courses: <ul style="list-style-type: none"> <li>• “Equal Employment Opportunity (EEO) for Supervisors”—80%.</li> <li>• “Prevention of Workforce Harassment (POWH)”—80%.</li> </ul>	Met target. <ul style="list-style-type: none"> <li>• “EEO for Supervisors”—88.6%</li> <li>• "POWH—89.96%</li> </ul>	Continue success rates.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Increased Underrepresentation of Populations on Decision Making Boards and Senior Level (SL) Positions SI Goal 6.2.9	Extend the awareness of the importance of having Decision Making Board Members and the Senior Leaders of the Smithsonian represent a Diversified Population.	<ul style="list-style-type: none"> <li>• Communicated the importance of having Decision Making Board Members and the Senior Leaders of the Smithsonian represent a Diversified Population.</li> <li>• Tracked and reported data and demographics.</li> </ul>	Success included: <ul style="list-style-type: none"> <li>• Advisory Boards include: 4 African Americans to National Air and Space (NASM); National Museum of African American History and Culture (NMAAHC); National Zoological Park (NZIP); &amp; Smithsonian American Art Museum (SAAM); and Hispanic to NZIP.</li> <li>• Senior Level (SL) Positions include: 2 African Americans to NMAAHC &amp; Asian American to Under Secretary for Finance &amp; Administration (USFA); Hispanic at National Museum of Natural History (NMNH).</li> </ul>	Continue successful practices.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence

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Smithsonian Supplier Diversity Goals SI Goal 6.2.9	Meet or exceed Smithsonian Supplier Diversity Goals by collaborating with Units, Office of Contracting (OCON), and Office of Equal Employment and Minority Affairs (OEEMA).	Tracked metrics for participation of Supplier Diversity Goals.	Target Not Met due to high dollar amount of construction projects, i.e., the building of the National Museum of African American History and Culture (NMAAHC) building.	Maintain awareness of the importance of Supplier Diversity Programs.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Diversity Outreach Initiative for Underrepresented Group SI Goal 6.2.10	Create at least one new outreach initiative focused on an underrepresented group.	<p>Implemented strategies for opportunities for Underrepresented Populations at the Smithsonian:</p> <ul style="list-style-type: none"> <li>• Met with American Association of University Women (AAUW) for a partnership with the Smithsonian.</li> <li>• Met with White House Representative on Historically Black Colleges and Universities (HBCU) and the Smithsonian initiative.</li> <li>• Collaborated with Smithsonian units (Office of Human Resources [OHR], Office of Fellowships and Internships [OFI], Assistant Secretary for Education and Access [ASEA] and Office of Sponsored (OSP) Projects on diversity and inclusion initiatives, employment, and intern opportunities.</li> <li>• Met with AAUW, ASEA, and Under Secretary for Science (USS) on Science, Technology, Engineering, and Mathematics (STEM) initiatives.</li> </ul>	Through extensive outreach activities and partnership approaches, exceeded targeted number of initiatives. Target exceeded.	Continue successful business practices.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Secretary's Executive Diversity Committee SI Goal 6.2.11	Focus the attention of the Executive Diversity Committee by conducting at least 2 meetings of the Secretary's Executive Diversity Committee.	Meetings were held in response to initiatives and diversity discussions.	Diversity as a value was included the Directors Survey in preparation for the Unit Director's Meeting for Fall, FY 2013. Target Completion was postponed for one month. Target partially met.	Create additional forums for diversity discussions incorporating broader aspects of topic.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence

HUMAN CAPITAL/ HUMAN RESOURCES (HC/HR) PROGRAMS/ INITIATIVES	PLANNING	IMPLEMENTATION	EVALUATION AND OUTCOMES	NEXT STEPS	OUTCOME ALIGNMENT WITH AGENCY MISSION
FY 2011 Smithsonian Institution's Management Directive (MD) 715	Submit Smithsonian's annual report to the Office of Equal Employment Opportunity (EEOC).	<p>The Office of Equal Employment Opportunity and Minority Affairs (OEEMA) submitted the report. Highlights included:</p> <ul style="list-style-type: none"> <li>• Demonstrated commitment by the Smithsonian Secretary, Dr. G. Wayne Clough, by issuing the "Diversity and Equal Employment Opportunity (EEO)" Policy Statement" and the "Prevention of Workplace Harassment (POWH) Policy Statement" on June 11, 2011.</li> <li>• Equal Employment Opportunity (EEO) and diversity performance indicators included in the Smithsonian annual performance objectives.</li> <li>• The OEEMA Director served as a member of the Senior Advisory Group, the executive body that advised the Secretary and Under Secretaries on matters regarding Smithsonian operations.</li> <li>• Strong partner of OHR for recruiting, selecting, and hiring a diverse population for the Smithsonian.</li> <li>• Smithsonian employees were informed of their EEO rights and responsibilities through a variety of methods. Specifically, policy statements, procedures for requesting reasonable accommodation, EEO training requirements as well as contact information and timeframes for filing EEO complaints were prominently posted on websites and in all offices, museums and research centers.</li> <li>• EEO complaints program is operated by OEEMA, a neutral arm of management that is independent from the Office of General Counsel (OGC), the defensive arm of the agency in compliance with Equal Employment Opportunity Commission (EEOC) Management Directives (MD) 110 and 715.</li> </ul>	<ul style="list-style-type: none"> <li>• "EEO for Supervisors" training was provided to 117 managers and supervisors, which resulted in 93.5% training compliance for this course.</li> <li>• Mandatory "Prevention of Workplace Harassment" (POWH) training was provided to 2,200 Smithsonian employees, resulting in POWH training compliance of 90.3%. The compliance rate of both courses exceeded the Institution's 80% goal.</li> <li>• Success of these programs depends on the collaboration and cooperation of Unit Directors, SI Senior Leaders, supervisors, employees, &amp; OEEMA professionals.</li> <li>• Through the effective use of ADR techniques and informal counseling, only 13 of the 320 employees filed formal complaints, resulting in a cost avoidance of \$1,204,000 related to potential investigations.</li> </ul>	Continue to closely monitor all EEO and diversity programs.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence

HUMAN CAPITAL/ HUMAN RESOURCES (HC/HR) PROGRAMS/ INITIATIVES	PLANNING	IMPLEMENTATION	EVALUATION AND OUTCOMES	NEXT STEPS	OUTCOME ALIGNMENT WITH AGENCY MISSION
		<ul style="list-style-type: none"> <li>Maintained an effective electronic EEO complaint monitoring system that tracked the location, status, trends and processing time at each stage of the complaint process. All parties were provided the maximum opportunity to freely request and participate in Alternative Dispute Resolution (ADR) at all stages of the EEO complaint process.</li> </ul>			
Smithsonian Accessibility Program	Provide guidance, education, training, and consultative assistance for accessibility issues at the Smithsonian.	Presented educational and informative programs on Accessibility: <ul style="list-style-type: none"> <li>“Digital Access for People with a Disability in the 21<sup>st</sup> Century Museum.”</li> <li>“Children of the Autism Spectrum and Museums.”</li> </ul>	Adherence to Smithsonian Directive (SD 215), Accessibility For People With Disabilities Policy	Continue best practices.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Smithsonian Heritage Steering Committee	Coordinate programming for the federally designated heritage months.	<ul style="list-style-type: none"> <li>Targeted programs include Black History Month (February), Women’s History Month (March), Asian Pacific American Heritage Month (May), Hispanic Heritage Month (September 15–October 15), and American Indian Heritage Month (November).</li> <li>Members of the Committee are from the museums and some research centers and supporting offices.</li> </ul>	<ul style="list-style-type: none"> <li>Targeted programs are part of the museums’ collections, exhibitions, educational outreach programs, and live demonstrations and performances.</li> <li>Smithsonian employees and the general public benefitted by these cultural programs.</li> </ul>	Continue successful best business practices.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Quality Labor and Employee Relations (LER) Program	Develop and implement multiple strategies to create and maintain the work climate for cooperation between employees, unions, and managers by providing policy training to managers and supervisors on union negotiations,	<ul style="list-style-type: none"> <li>Conducted management training to cover new changes and policy issues relating to employee complaints.</li> <li>Hired an additional staff member to replace LER professional.</li> <li>LER curriculum now included in the “Fundamentals for Supervisors.”</li> </ul>	<ul style="list-style-type: none"> <li>Presented 4 “Managing Employee Problems and Problem Employees with a Customer Service Rating of 82% (target 80%).</li> </ul>	Continue to develop methods to decrease and resolve employee complaints.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through Organizational Excellence

HUMAN CAPITAL/ HUMAN RESOURCES (HC/HR) PROGRAMS/ INITIATIVES	PLANNING	IMPLEMENTATION	EVALUATION AND OUTCOMES	NEXT STEPS	OUTCOME ALIGNMENT WITH AGENCY MISSION
	employees' rights and management authority to enforce work related policy.		<ul style="list-style-type: none"> <li>Adhered to all Smithsonian contract agreements.</li> </ul>		
Smithsonian Electronic Performance Management System (EPMS)	Complete the rollout of the pilot EPMS with the Office of Facilities, Engineering, and Operations (OFEO)	Did not implement the rollout of the EPMS to Smithsonian employees. Barriers were detected in the electronic application and beta tests failed.	Postponed until the electronic application meets all the requirements of an enterprise implementation. Target not met.	Waiting the funding of the licenses and the approval for implementation.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Smithsonian Pilot Performance Management Project FY 2012-2013	Develop a Pilot Program that would allow Units or designated populations to have the capability of evaluating performance on a defined rating scale.	Developed a Pilot Project to have defined rating scale for performance: <ul style="list-style-type: none"> <li>The Smithsonian Associates (TSA) wanted to have a performance rating system match the factors in the Position Descriptions.</li> <li>The National Museum of Natural History (NMNH) wanted a weighted increase of performance on research for its curators and researchers.</li> </ul>	2 Pilot Programs were implemented, but not yet evaluated. Target met.	Develop Performance Survey for stakeholders to assess impact of Pilot Program and for developing recommendations.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Smithsonian Performance Management Appraisal System Survey	Develop, deploy, and compare information and data on employees and supervisors perspectives on the Smithsonian Appraisal System.	Developed, deployed, and compared information and data on employees and supervisors perspectives on the Smithsonian Appraisal System based on questions from the FY 2007 Performance Management Survey and the Smithsonian Employee Perspective Survey. Survey covered the topics of communications and participation in the life cycle of performance management.	Survey deployed and data and information analyzed. Target Met. Noted highlights from the Performance Management Appraisal Survey-- <ul style="list-style-type: none"> <li><b>75%</b> - Smithsonian employees were satisfied with the opportunity to participate in preparing their FY 2011 Performance Plans.</li> <li><b>78%</b> - Smithsonian employees felt that their Performance Appraisals were fair</li> </ul>	Implement at least 3 recommendations from the FY 2012 Smithsonian Performance Management Report.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence

HUMAN CAPITAL/ HUMAN RESOURCES (HC/HR) PROGRAMS/ INITIATIVES	PLANNING	IMPLEMENTATION	EVALUATION AND OUTCOMES	NEXT STEPS	OUTCOME ALIGNMENT WITH AGENCY MISSION
			<p>reflections of their annual performances.</p> <ul style="list-style-type: none"> <li>• <b>71%</b> - Smithsonian employees felt their discussions with their supervisors were worthwhile.</li> <li>• <b>81%</b> - Smithsonian employees understood what they had to do to be rated at the different performance levels (e.g. Successful, Highly Successful, and Outstanding).</li> <li>• <b>71%</b> - Smithsonian employees said that they met at least 3 times with their supervisors during the annual performance cycle (e.g. Performance Planning Discussion, Mid-Year, and End of Appraisal).</li> <li>• <b>79%</b> - Smithsonian employees felt that they were encouraged by their supervisors to achieve positive results.</li> <li>• <b>83%</b> - Smithsonian employees understand the value of Performance Plans that are closely aligned to day to day activities, Smithsonian Strategic Priorities, Grand Challenges, and their units/organizational goals.</li> </ul>		

HUMAN CAPITAL/ HUMAN RESOURCES (HC/HR) PROGRAMS/ INITIATIVES	PLANNING	IMPLEMENTATION	EVALUATION AND OUTCOMES	NEXT STEPS	OUTCOME ALIGNMENT WITH AGENCY MISSION
SI Performance Management System Report	Develop, write and publish a SI Performance Management Report based on multiple data and information sources.	Analyzed the results of various Performance Management indicators, policies, programs, and surveys to develop recommendations for an improved Performance Management Environment. Stakeholders included supervisors, managers, employees, and program managers. Feedback analysis based on— <ul style="list-style-type: none"> <li>• Smithsonian Performance Management Appraisal System Survey</li> <li>• Individual Performance Index of the FY 2011 Smithsonian Employee Perspective Survey (SEPS)</li> <li>• FY 2011 SI Performance Appraisal and Assessment Tool (PAAT)</li> <li>• FY 2011-FY 2012 SI Human Capital Management Evaluation (HCME)</li> <li>• FY 2011 Human Capital Management Report (HCMR)</li> <li>• FY 2010-2011 Smithsonian Employee Performance Appraisal Ratings</li> </ul>	Systems approach of evaluation from multiple stakeholders using multiple assessment tools. Target Met and recommendations included in the Report.	Implement at least 3 recommendations from the FY 2012 Smithsonian Performance Management Report.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Smithsonian Performance Management System Training and Consultative Assistance	Improve the quality of writing and standards in the Employees Performance Plans.	<ul style="list-style-type: none"> <li>• Business Partners assisted supervisors in developing quality standards and elements for employee Performance Plans.</li> <li>• Targeted training on performance management was given in Spanish to supervisors at the Smithsonian Tropical Research Institute (STRI) in Panama.</li> <li>• Module on the Performance Management System is included in the “Fundamentals for Supervisor” course.</li> </ul>	Target met. With the hiring of an entire new OHR Business Partner staff, consultative assistance will increase.	<ul style="list-style-type: none"> <li>• Provide access to online training for performance management.</li> <li>• Include “SMART” guidance in the EPMS training when deployed.</li> </ul>	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence
Smithsonian Awards Review	Develop a presentation that gives a snapshot of the Smithsonian Awards Practices.	Developed a presentation that gives a snapshot of the Smithsonian Awards Practices.	Data and information gathered but final presentation postponed until FY 2013. Target partially met.	Publish Smithsonian Awards Presentation.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our



HUMAN CAPITAL/ HUMAN RESOURCES (HC/HR) PROGRAMS/ INITIATIVES	PLANNING	IMPLEMENTATION	EVALUATION AND OUTCOMES	NEXT STEPS	OUTCOME ALIGNMENT WITH AGENCY MISSION
					Mission through Organizational Excellence
FY 2012 Secretary Awards Program	Select successful professionals that assist the Smithsonian in being a leading edge organization in the museum and scientific worlds.	<p><u>Secretary Awards for Excellence in Collaboration, Innovation, and Spirit</u>--</p> <ul style="list-style-type: none"> <li>• Scott Rosenfeld, Exhibition Lighting Designer at the Smithsonian American Art Museum (SAAM), received the Innovative Spirit Award for his work on the Gateway Project, research originally undertaken by the U.S. Department of Energy to study the damage caused by LED lamps to museum collections. Scott's innovative thinking and dedicated research expanded the Gateway report. He also created a guide to LED lighting products so designers can make informed decisions about lighting collections objects. His pioneering work is helping to create a sustainable museum environment.</li> <li>• Raineldo Urriola, Scientific Coordinator at the Smithsonian Tropical Research Institute (STRI), received the Spirit of the Smithsonian Award for successfully coordinating scientific logistics for hundreds of visiting and staff scientists with a high level of tact and professionalism. Raineldo is the consummate professional who has assisted in the research of his colleagues and whose work ethic, selfless dedication, and gracious nature has facilitated hundreds of publications.</li> <li>• Camy Clough, Public Programs Specialist at the National Museum of American History (NMAH), received the Collaborative Spirit Award for demonstrating the spirit and power of public-private partnerships by leading the team that organized the "Girl Scouts Rock the Mall 100th Anniversary," which attracted 250,000 visitors. Camy is a</li> </ul>	Awards decided by a panel of SI leaders, curators, and researchers based on defined criteria.	Continue successful practices to assist the Smithsonian on being a leading edge institution in the museum and scientific worlds.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence

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		<p>visionary leader and collaborator who achieved these results with boundless resourcefulness, and she inspired the learning in everyone by showcasing Smithsonian expertise, collections, and programs for the public.</p> <ul style="list-style-type: none"> <li>General Jack Dailey and the Welcome Discovery Team also received the Collaborative Spirit Award for successfully creating a multiday public awareness campaign, festival, and ceremony for the arrival of the Space Shuttle Discovery. Jack and the Welcome Discovery Team brought perspectives, expertise, and enthusiasm that resulted in a remarkable occasion and engaged nearly 5 billion people worldwide in learning about the historic and scientific achievements of the shuttle, space program, Smithsonian, and National Air and Space Museum (NASM). <p><u>Secretary's Distinguished Research Lecture Award</u></p> <ul style="list-style-type: none"> <li>Louise Allison Cort, Curator of Ceramics at the Freer Gallery of Art and Arthur M. Sackler Gallery (FSG), received the award for sustained achievement in research, long-standing investment in the Smithsonian, outstanding contribution to a field, and ability to communicate research to a nonspecialist audience. She is the author of "Shigaraki, Potters' Valley;" an online catalogue "Ceramics in Mainland Southeast Asia: Collections in the Freer Gallery of Art and Arthur M. Sackler Gallery." Her study on Indian earthenware, "Temple Potters of Puri," will be soon being published.</li> </ul> </li></ul>			
<b>Human Capital Accountability</b> FY 2011-2012 Human Capital Management	Resolve and complete "Required Actions" for Performance Management Practices.	Resolution of Required Actions: <ul style="list-style-type: none"> <li>Implementation of the Electronic Performance Management System (EPMS) is a date and communications-</li> </ul>	Resolutions accepted by the Office of Personnel Management (OPM) Merit System Audit and	Monitor and correct discrepancies noted in Required	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through

HUMAN CAPITAL/ HUMAN RESOURCES (HC/HR) PROGRAMS/ INITIATIVES	PLANNING	IMPLEMENTATION	EVALUATION AND OUTCOMES	NEXT STEPS	OUTCOME ALIGNMENT WITH AGENCY MISSION
Evaluation for Performance Management Practices		<p>driven performance management system for supervisors and employees.</p> <ul style="list-style-type: none"> <li>• SI-wide Communications informing employees of performance management cycle timelines.</li> <li>• Standard Operating Procedures (SOPs) written for OHR staff for procedures for timely processing and proper filing of electronic and hard copy appraisals.</li> <li>• SOPs written for more accurate descriptions of award justifications.</li> </ul>	Compliance. Audit closed October 2012.	Actions.	Organizational Excellence
Smithsonian Employee Perspective Survey (SEPS)	Provide a communications feedback tool to maintain an engaged workforce.	<ul style="list-style-type: none"> <li>• Deployed Smithsonian Employee Perspective Survey (SEPS) in spring 2012.</li> <li>• Developed a functional analysis system to assist with the understanding of the multiple issues in employee satisfaction and engagement.</li> </ul>	<b>Ranked 3<sup>rd</sup> Best Place in the Federal Government for mid-size Agencies.</b>	Provide the Functional Analysis Tool to the Business Partners to help in their consultative sessions with the Units.	Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Grand Challenges--Unlocking the Mysteries of the Universe; Understanding and Sustaining a Biodiverse Planet; Valuing World Cultures; and Understanding the American Experience; and its Strategic Priorities--Enabling our Mission through Organizational Excellence

## PERFORMANCE CULTURE QUESTIONS

### 1. What actions have your agency taken to improve your Employee Viewpoint Survey (EVS)/Smithsonian Employee Perspective Survey (SEPS) Performance Culture Index (PCI)? And/or what plans has your agency made to improve on the elements that feed into the Overall PCI?

- The Smithsonian Institution developed the Smithsonian Employee Perspective Survey (SEPS) for its Federal and Trust Employees based on the questions of the Federal Employee Viewpoint Survey (EVS). It also included Smithsonian-specific questions for its survey. For FY 2012, the Smithsonian Institution has been named the "Third Best Place to Work" in the Federal space, previously ranked "Fourth Best Place to Work" in the FY 2010 and FY 2011 surveys. The Smithsonian Performance Culture Index (CPI) is quite high in relation to other Federal organizations.
- Because of the mission areas, Strategic Priorities, nature, and culture of the Smithsonian, it values coordination and collaboration across Units (museums, research centers, and offices); it has continuous activities that strengthen those relationships.
- The new Smithsonian Supervisory Course--"Fundamentals for Supervisors" stresses performance management, employee-supervisor communication, and employee development (CPI data points).
- The Office of Human Resources (OHR) developed a functional analysis system to assist with the understanding of the multiple issues in employee satisfaction and engagement factors.

### 2. Answer the following questions only if your agency meets the criteria set at the beginning of each question.

#### a. Evaluating Non Senior Executive Service (SES) Appraisal Program--Smithsonian Institution's Performance Assessment and Appraisal Tool (PAAT).

Score unknown. Since we have not heard from OPM, assume that it is above the "80-point" criteria. Will perform another PAAT review at the required time.

#### b. Evaluating Senior Leader Appraisal Program

- 1) The correlation coefficient of the agency's Senior Executive Service (SES) members and their performance pay should be at least .5.  
N/A – the Smithsonian does not have any SES members.
- 2) If your agency has a correlation coefficient less than .5, what actions are you taking to improve the correlation? If your agency's coefficient is .5 or above, you do not have to answer this question.  
N/A see above.
- 3) If your agency has an SES or Senior Leader/Senior Technical (SL/ST) appraisal system that does not yet have full certification, what actions are you taking to improve the system?  
The Smithsonian has initiated the process to request provisional certification and we are working with OPM on this matter.

**ACCOUNTABILITY.** Human Capital decisions are guided by a data-driven, results-oriented planning, and accountability system.

Criteria includes: Human Capital Accountability System, Measures of Effectiveness, and Continuous Improvement in Human Capital Management Systems.

HUMAN CAPITAL/ HUMAN RESOURCES (HC/HR) PROGRAMS/ INITIATIVES	PLANNING	IMPLEMENTATION	EVALUATION AND OUTCOMES	NEXT STEPS	OUTCOME ALIGNMENT WITH AGENCY MISSION
<p><b>Human Capital Accountability</b> SI Human Capital Management Report (HCMR) FY 2011</p>	<p>Annual status report of Smithsonian's Human Capital Management at the Smithsonian--alignment of policies, practices, and procedures to the Smithsonian Strategic Plan and the Office of Personnel Management's (OPM) Human Capital Accountability and Assessment Framework (HCAAF) guidelines.</p>	<p>Developed and published the Smithsonian Human Capital Management (HCMR) Report FY 2011 according OPM's HCAAF with input from Smithsonian Human Capital stakeholders. In addition, this is a regulatory requirement and evaluated by Program Managers at OPM.</p>	<p>Smithsonian Human Capital Management Report (HCMR) FY 2011 on time and in correct format. Received good marks from OPM. Target met.</p>	<p>Same regulatory requirement for FY 2012.</p>	<p>Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through Organizational Excellence</p>
<p><b>Human Capital Accountability</b> Smithsonian Human Capital Management Evaluation (HCME) FY 2011-2012</p>	<p>An audit review by OPM for compliance with Delegated Examining (DE) Authority, Hiring Reform, and Best Practices in Human Capital.</p>	<p>13 months of completing requirements for OPM's Dallas Oversight Office, Merit System Audit and Compliance. Received a "clean audit" from OPM.</p>	<p>Annual Delegated Examining (DE) audit included in the HCME. Smithsonian OHR Branches— Recruitment, Business Partner, Benefits and Compensation, and Workforce Planning and Performance worked as a team to complete all "Required Actions."</p>	<p>Continue annual Delegated Examining Audits for OHR and HR Department at the Smithsonian Astrophysical Observatory (SAO).</p>	<p>Alignment with Smithsonian Strategic Plan FY 2010-2015 and its Strategic Priorities--Enabling our Mission through Organizational Excellence</p>

**SECTION III. HUMAN CAPITAL PLANNING (HCP) DOCUMENTS**

**Please indicate if you have the following:**

<b>Document / Plan</b>	<b>Choose Yes or No</b>	<b>If Yes, Date Revised (mmddyy)</b>
Current Workforce Plan	No Smithsonian-wide plan; only Unit-based plans	
Current Human Capital Strategic Plan	Yes	10/31/11
Current Succession Plan	No Smithsonian-wide plan; only Unit-based plans	
Strategic Recruitment Plan	Yes	09/30/11
Routinely Used New Hire Survey	Yes, but needs Revision	09/30/11
Routinely Used Exit Survey	No	

## SECTION IV. HUMAN CAPITAL GOVERNMENT-WIDE INITIATIVES

Please answer the following questions on Government-wide initiatives.

**1. Veterans Employment Initiative. In accordance with Section 3(c), (d), and (e) of Executive Order (EO) 13518 – Employment of Veterans in the Federal Government, please describe how your agency has improved employment opportunities for veterans.**

The Smithsonian is not an Executive Agency and thus this EO does not apply.

However, the Smithsonian is very engaged in its recruiting and hiring practices for veterans. The Smithsonian did use the Hiring Authorities of the Veterans Reemployment Act (VRA), Veterans Employment Opportunity Act (VEOA), and 30% More Disabled Veteran.

Activities and Outreach included:

- Career Fairs and Outreach Programs, such as, Veterans Career Fair and Exposition at the Washington DC Convention Center; AON's Salute to America's Wounded Warrior Networking Fair in Arlington, VA.; & Military Night and Military and Veterans Job Fair at the Washington Wizards Game at the Verizon Center in Washington DC.
- Uniformed Services Employment and Reemployment Rights Act (USERRA) training for Smithsonian supervisors. Target 85% completion.
- USERRA course included in the Supervisors Certificate Program.
- Began tracking Veteran Hires for Trust positions.
- Submitted SI's FY 2012 Disabled Veterans Affirmative Action Program (DVAAP). Highlights included Veteran Career Fairs and Outreach Programs; communication strategies for job openings; veteran hiring practices for supervisors; promotion data on veterans and disabled veterans (12.5% and 4.6% respectively).

Results included:

- USERRA Training—93% completion. Target exceeded.
- Increased hiring of veterans and disabled veterans (Federal hires):
  - # of Veterans hired  
FY 2011—26  
FY 2012—28
  - % of Disabled Veterans hired  
FY 2011—8.9%  
FY 2012—9.9%
  - Total % of Veterans hired  
FY 2011—19.1%  
FY 2012—20.5%
  - Number of Veterans at the Smithsonian population (Federal)  
FY 2011—515  
FY 2012—521
  - Number of Disabled Veterans in Smithsonian population (Federal)  
FY 2011—101  
FY 2012—110

**2. Hiring Reform. How has the Government-wide focus on Hiring Reform improved recruiting and hiring in your agency (include supporting data)?**

Streamlining the hiring process under Hiring Reform has improved recruiting and hiring at the Smithsonian. Data reflects a dramatic increase in the number of applicants applying for jobs. This may be attributed to the shorter, easy-to-read job announcements and the elimination of the requirement to respond to Knowledge, Skills, Abilities (KSA essays). Because of the requirement for Category Rating, managers seemed to be pleased about having a larger pool of talented applicants to select from. The fact that SI is fully automated now decreased the processing time. Data reflects that the recruitment process has dropped from 157 days at the end of Fiscal Year (FY) 2010 to 124 days at the end of FY 2012 to bring an applicant on board **(24% reduction in days)**. Additional Information included in the last section.

- 3. Extension of Benefits to Same-Sex Domestic Partners of Federal Employees. Implementation of the President’s Memorandum Regarding Extension of Benefits to Same-Sex Domestic Partners of Federal Employees.**  
**Reporting Requirement—agencies will complete and submit the tables of requested data in the HCMR MAX Collect exercise and report on 2012 Government-Wide Benefits, Non-Title 5 agencies benefits, and agency-specific/work life benefits.**

Government-Wide Benefits	Authority	Employees and Managers have been notified and are able to utilize benefits
Federal Long Term Care Insurance Program (FLTCIP)	5 Code of Federal Regulations (CFR) 875.213	Yes
Family Medical Leave Act (FMLA) for birth, adoption bonding or care of domestic partner's child when employee stands in loco parentis	Compensation Policy Memorandum (Office of Personnel Management [CPM]) 2010-15	Yes
Sick leave to care for same-sex domestic partners	5 CFR 630.201(b)	Yes
Sick leave for bereavement	5 CFR 630.201(b)	Yes
Funeral leave	5 CFR 630.803	Yes
Emergency leave transfer	5 CFR 630.1102	N/A
Leave bank program	5 CFR 630.1102	N/A
Extension of 24-hour Leave Without Pay (LWOP) Family Support	OPM Memorandum Sep 10, 2010	Yes
Emergency travel	Federal Travel Regulations (FTR) 301-30	N/A
Threatened law enforcement /investigative employees	FTR 301-31	N/A
Relocation allowance by specific type	FTR 302-3	N/A
Allowance for subsistence and transportation	FTR 302-4	N/A
Allowances for temporary quarters subsistence expenses	FTR 302-6	N/A
Agency requirements for payment of expenses connected with the death of certain employees	FTR 303-70	N/A



**Same Sex Domestic Partner Benefits - Retirement Benefits**

<b>Retirement Benefits</b>	<b>Authority</b>	<b>Employees and managers have been notified and are able to utilize below benefits.</b>
Joint life and Survivor annuity Federal Employees Group Life Insurance (FGLI)	5 CFR 870.802	Yes
Death Benefits	5 CFR 831.2005; 5 CFR 843	Yes
Death gratuity	5 United States Code (USC) 8133	Yes
Department of Labor (DOL)/ Office of Workers Compensation Program (OWCP) Death gratuity (50%)	5 USC 8102a	Yes
Retirement Survivor Annuity Insurable Interest [Civilian Retirement Service System (CSRS) / Federal Employees Retirement System (FERS)]	5 CFR 831.613; 5 CFR 842.605	Yes

**Same-Sex Domestic Partner Benefits - Non-Title 5 Agency Benefits**

Non-Title 5 Agency Benefits	Authority	Employees and managers have been notified and are able to utilize below benefits
Health insurance premium reimbursement program		N/A
Dental insurance		N/A
Retiree Dental Plan		N/A
Vision insurance		N/A
Flexible spending account		N/A
Dependent life insurance		N/A
Business travel accident insurance		N/A
Employment counseling/ testing for relocating employee's spouse/ domestic partner		N/A
Reimbursement for fitness center memberships		N/A
Reimbursement for homeowners insurance		N/A
Reimbursement for physical exams		N/A
Access to site information and participation in selection briefings		N/A

**Agency Specific Benefits/Work life Benefits**

Agency Specific Benefits/Work life Benefits	Authority	Employees and managers have been notified and are able to utilize below benefits
Leave and work scheduling flexibilities including but not limited to child birth and/or adoption		Yes
Access to Employee Assistance Program (EAP)	5 CFR 792 Subpart A	Yes
Child care subsidy/provider	5 CFR 792 Subpart B	N/A
Planning and counseling services (financial)		Yes
Retirement Planning Programs/Seminars		Yes
Family assistance services (i.e. referrals to adoption counseling, parenting counseling, career counseling, etc.)		Yes
School Age Care program		N/A
Youth Programs		N/A
Life Care		N/A
Parenting and elder care support groups		N/A
Hardship transfers to maintain or improve the health of a same-sex domestic partner		N/A
Joint consideration for transfers		N/A
Family visitation travel		N/A
Access to lodging or allowance		N/A
Deployment support		N/A
Credit Union Benefits		Yes
Access to fitness facilities		Yes
Access to medical treatment		N/A
Family and morale/wellness/recreation (MWR)		Yes
Awards Ceremony/ representation/ fundraiser events		Yes
Expression of sympathy/ Letters of Condolence		Yes
Accidental death and dismemberment insurance		Yes
Long-Term Disability death benefit		N/A

**Benefits under Foreign Affairs Manual and its Standardize Regulations (Administered by State Department)**

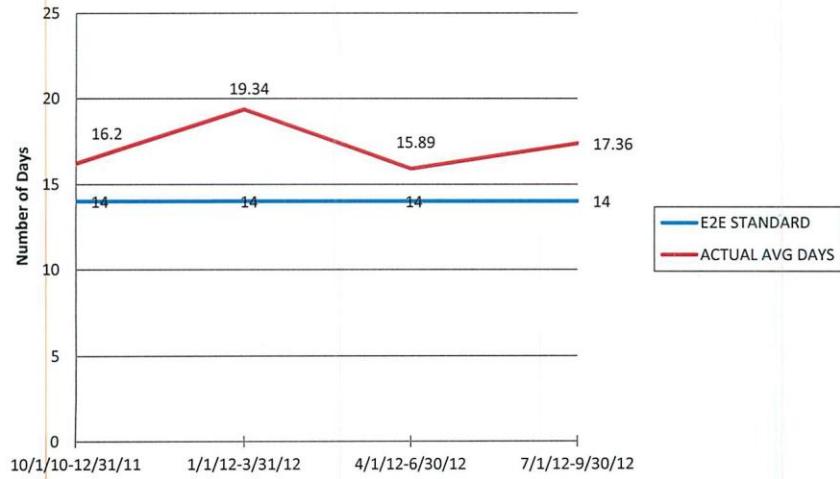
<b>Benefits</b>	<b>Authority</b>	<b>Employees and managers have been notified and are able to utilize below benefits</b>
Diplomatic passports [United States (U.S.) Citizens only]		N/A
Inclusion on employee travel orders to and from post abroad		N/A
Shipment of household effects		N/A
Inclusion in family size calculations for the purpose of making housing allocations		N/A
Family member preference for employment at post abroad		N/A
Use of medical facilities at posts overseas/ Embassy health units		N/A
Medical evacuation from posts overseas		N/A
Emergency travel for partners to visit gravely ill or injured employees and relatives		N/A
Inclusion as family members for emergency evacuation from posts abroad		N/A
Subsistence payments related to emergency evacuation from posts abroad		N/A
Inclusion in calculations of payments of overseas allowances (i.e. payment for quarter's cost of living etc.)		N/A
Representation expenses		N/A
Training at the Foreign Service Institute (space available)		N/A
Other - Actions taken by agency with regard to this benefit	Authority	Yes, No, or NA
Establish Domestic Partners Benefit Program		N/A
Updated Agency specific policies		N/A

**Communication**

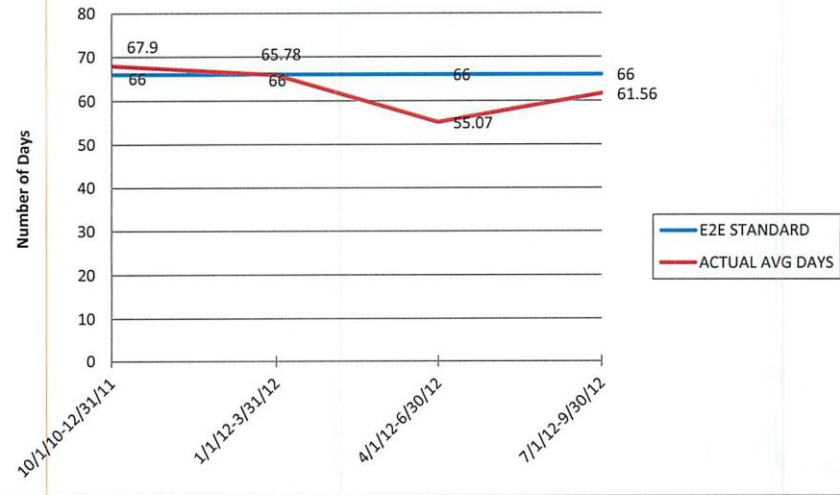
<b>Communication</b>	<b>Authority</b>	<b>Employees and managers have been notified and are able to utilize below benefits</b>
Website		Yes
E-mail communications		Yes
Newsletters/ agency notices		Yes
Information included in employee orientation		Yes
Working groups [Lesbian/Gay/Bisexual/Transgender (LGBT) Group, diversity counsel, etc.]		Yes
Fact sheet on domestic partnership		No
Domestic Partnership helpdesk/ Lead to answer questions / Individual confidential counseling (training)		No
Educating managers and employees		Yes
Internal Guidance provided (not specified)		No

**SECTION V. ADDITIONAL INFORMATION REGARDING SMITHSONIAN RECRUITMENT DATA**

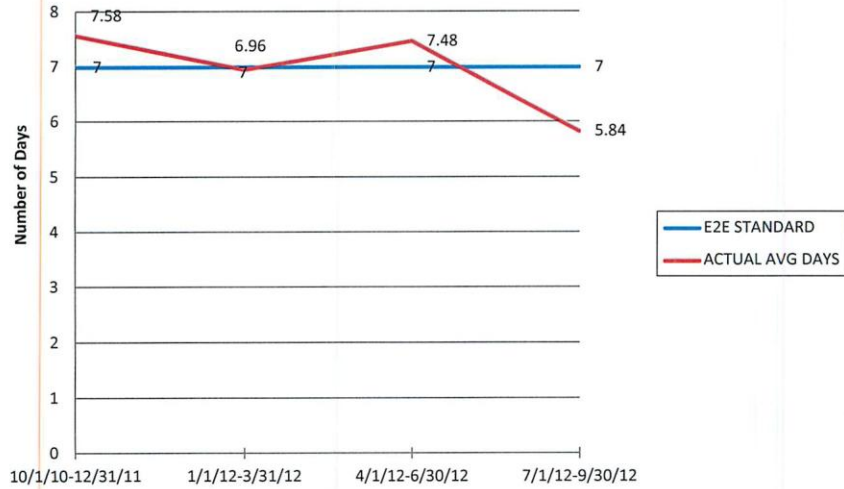
### ANNOUNCEMENT CLOSE-EVALUATION COMPLETE



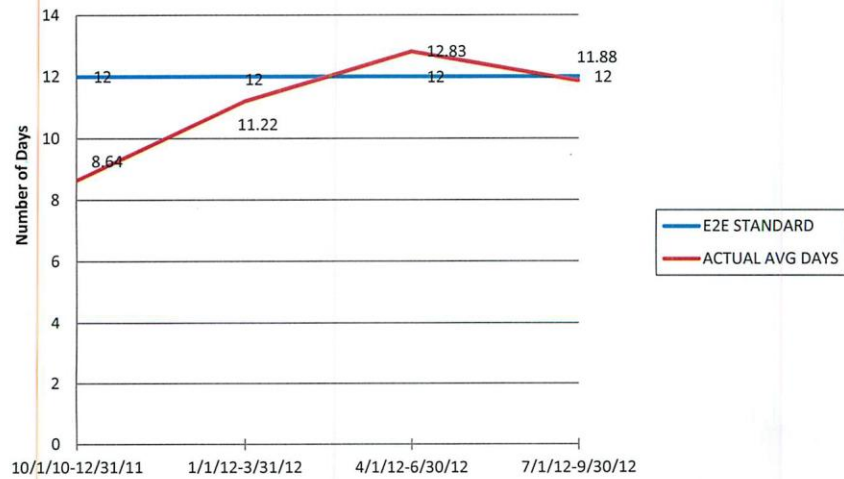
### VALIDATE NEED-EFFECTIVE DATE (MINUS SECURITY)



### VALIDATE NEED-ANNOUNCEMENT TO ORG (PD ALREADY CLASSIFIED)



### VALIDATE NEED-ANNOUNCEMENT TO ORG (PD CLASSIFIED BY RECRUITMENT BRANCH)





ANNOUNCEMENT OPEN TO EVALUATION COMPLETED				
	10/1/10- 12/31/11	1/1/12- 3/31/12	4/1/12- 6/30/12	7/1/12- 9/30/12
E2E STANDARD	14	14	14	14
ACTUAL AVG DAYS	16.2	19.34	15.89	17.36

VALIDATE NEED-EFFECTIVE DATE (MINUS SECURITY)				
	10/1/10- 12/31/11	1/1/12- 3/31/12	4/1/12- 6/30/12	7/1/12- 9/30/12
E2E STANDARD	66	66	66	66
ACTUAL AVG DAYS	67.9	65.78	55.07	61.56

VALIDATE NEED-ANNOUNCEMENT TO ORG (PD ALREADY CLASSIFIED)				
	10/1/10- 12/31/11	1/1/12- 3/31/12	4/1/12- 6/30/12	7/1/12- 9/30/12
E2E STANDARD	7	7	7	7
ACTUAL AVG DAYS	7.58	6.96	7.48	5.84

VALIDATE NEED-ANNOUNCEMENT TO ORG (PD CLASSIFIED BY RECRUITMENT BRANCH)				
	10/1/10- 12/31/11	1/1/12- 3/31/12	4/1/12- 6/30/12	7/1/12- 9/30/12
E2E STANDARD	12	12	12	12
ACTUAL AVG DAYS	8.64	11.22	12.83	11.88

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