

## SCHEDULING NOTE

**Title:** BRIEFING ON PROJECT AIM 2020 (Public Meeting)

**Purpose:** The purpose of this briefing is to update the Commission on the progress of Project Aim 2020 implementation.

**Scheduled:** **September 8, 2015**  
**9:30 am**

**Duration:** Approx. 1.5 hour

**Location:** Commissioners' Conf. Room, 1<sup>st</sup> Fl., OWFN

### Participants

**Mark Satorius**, Executive Director for Operations  
**Maureen Wylie**, Chief Financial Officer  
**Fred Brown**, Senior Advisor, OEDO  
**Kristin Davis**, Chief, Outreach and Recruitment Branch, OCHCO

### Presentations

**40 mins.\***

#### Topics:

- Background
- Progress on Implementation of Aim Strategies
  - Rebaselining the Work of the Agency
  - Strategic Workforce Planning
- Next Steps

### **Commission Q & A**

**40 mins.**

**Sheryl Burrows**, President of the National Treasury Employees Union, will be invited to sit in the well. The Chairman will ask for Union remarks, as permitted, under the formal meeting provision of the Collective Bargaining Agreement.

\*For presentation only and does not include time for Commission Q & A's.



# **Briefing on Project Aim 2020 September 8, 2015**

# Agenda

- **Background**
- **Progress on Implementation of Aim Strategies**
  - **Re-baselining the Work of the Agency**
  - **Strategic Workforce Planning**
- **Next Steps**

# **Background and Progress on Implementation of Project Aim Strategies**

**Mark Satorius  
Executive Director for Operations**

**Maureen Wylie  
Chief Financial Officer**

# **Implementation Activities Underway**

- **Developed plans and schedules for strategies**
- **Completed several key tasks**
- **Primary focus remains on mission**

# **Importance of Managing Change**

- **Foster an environment for success**
- **Build trust**
- **Solve challenges by innovating together**
- **Use the Available Change Management Resource effectively**

# **Effective Collaboration and Communication**

- **Actively engaging the staff**
- **Ownership and involvement by senior management**
- **Leading staff through changing environment**

# **Progress on Several Key Tasks**

- **Addressing Resource Constraints**
  - **FY16 full-time equivalent target of 3600**
  - **Overhead reductions**
- **Early Improvements**
  - **Fee rule transparency**
  - **Operating Reactor Licensing backlog**



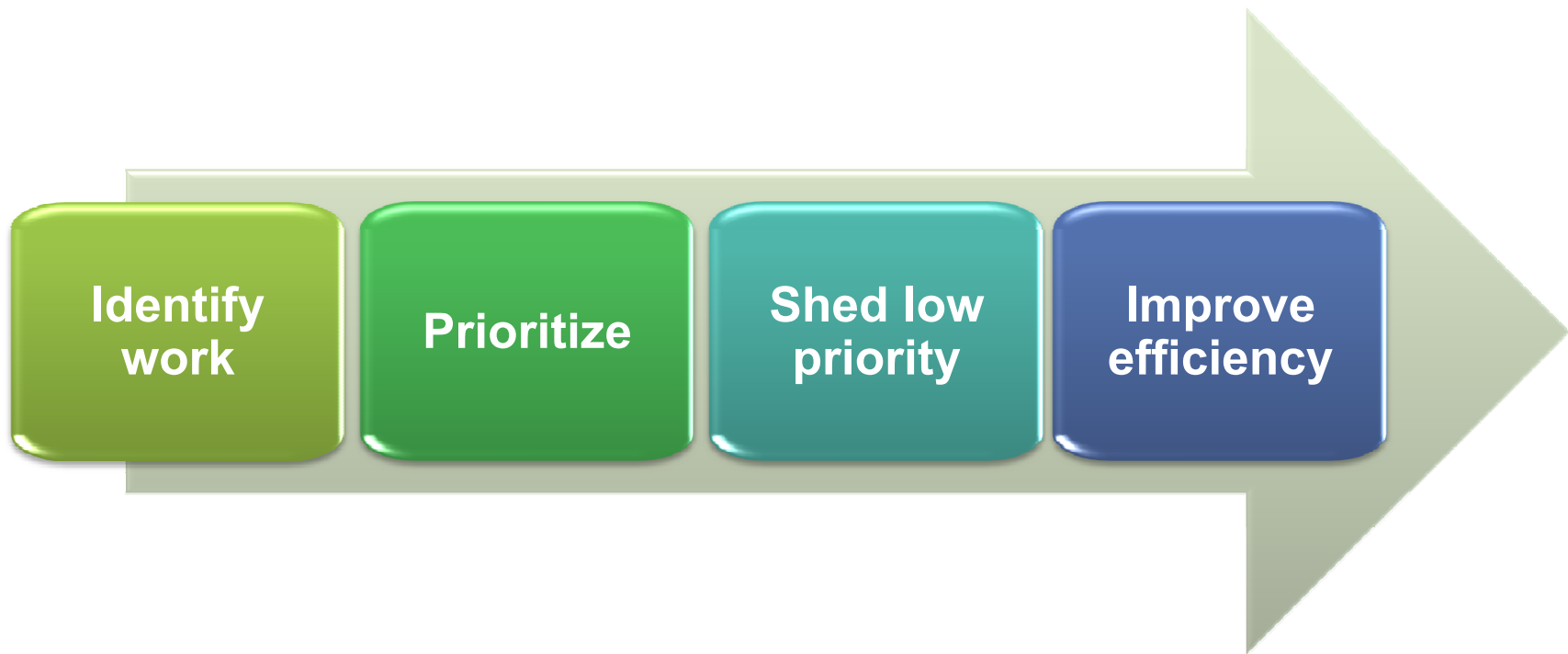
# **Re-baselining the Work of the Agency**

**Frederick Brown, Senior Advisor  
Office of the Executive Director for  
Operations**

# **Guiding Principles**

- **Transparency**
- **Engagement**
- **Partnering**

# Prioritization & Re-Baselining



# **The Approach**

- **Aim for actionable results**
- **Set clear expectations, guidance and criteria**
- **Leverage the expertise of our stakeholders**

# Objectives

- **Better Add/Shed decisions**
- **Quick savings**
- **Near-term budget reductions**
- **Longer-term improvements**
- **Skills need information**

# **Factors to Balance**

- **Specificity vs. Flexibility**
- **Rigor vs. Resource Expenditure**
- **Cost of Change vs. Adequacy of the Status Quo**

# **Strategic Workforce Planning (SWP)**

**Kristin Davis, Branch Chief  
Human Resources  
Operations and Policy  
Office of the Chief Human  
Capital Officer**

# **SWP Goal and Purpose**

- **Goal:**
  - **To ensure that “the right people with the right skills are in the right place at the right time.”**
- **Purpose:**
  - **To make staffing decisions based on mission, strategic direction, budgetary resources and a desired set of workforce skills.**



# SWP Process Model



# **Current Status**

- **Project Plan and Communications Plan developed**
- **Step #2 – Analyze Current Workforce**
  - **Analyze FY 2016 Staffing Plans**
  - **Identify current potential surpluses/gaps**
  - **Refine surpluses/gaps**

# **Current Status, continued**

- **Based on Project Aim 2020 report**
  - **translate high-level workload shifts into office workload adjustments and resource needs**
- **Identify future surpluses/gaps**
- **Identify strategies to align future workforce to future needs**

# **Key Messages**

- **Strategic Workforce Planning is not easy**
- **Strategic Workforce Planning is not exact**
- **Strategic Workforce Planning needs to be a repeatable process**

# Next Steps

- **Additional near term progress**
  - **Contracting standardization**
  - **Assessment of risk to information technology systems**
  - **Recommendations for Centers of Expertise**
  - **Revised add/shed procedure**
- **Primary focus remains on mission**

# Closing