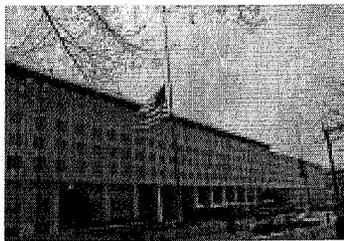


# **ICASS**

## **Executive Board Meeting**

**April 27, 2006**



**Hosted by the  
Department of State**



International Cooperative Administrative Support Services

**Agenda**  
**ICASS EXECUTIVE BOARD MEETING**  
Department of State, Room 1107  
April 27, 2006  
3:30 – 5:00 pm

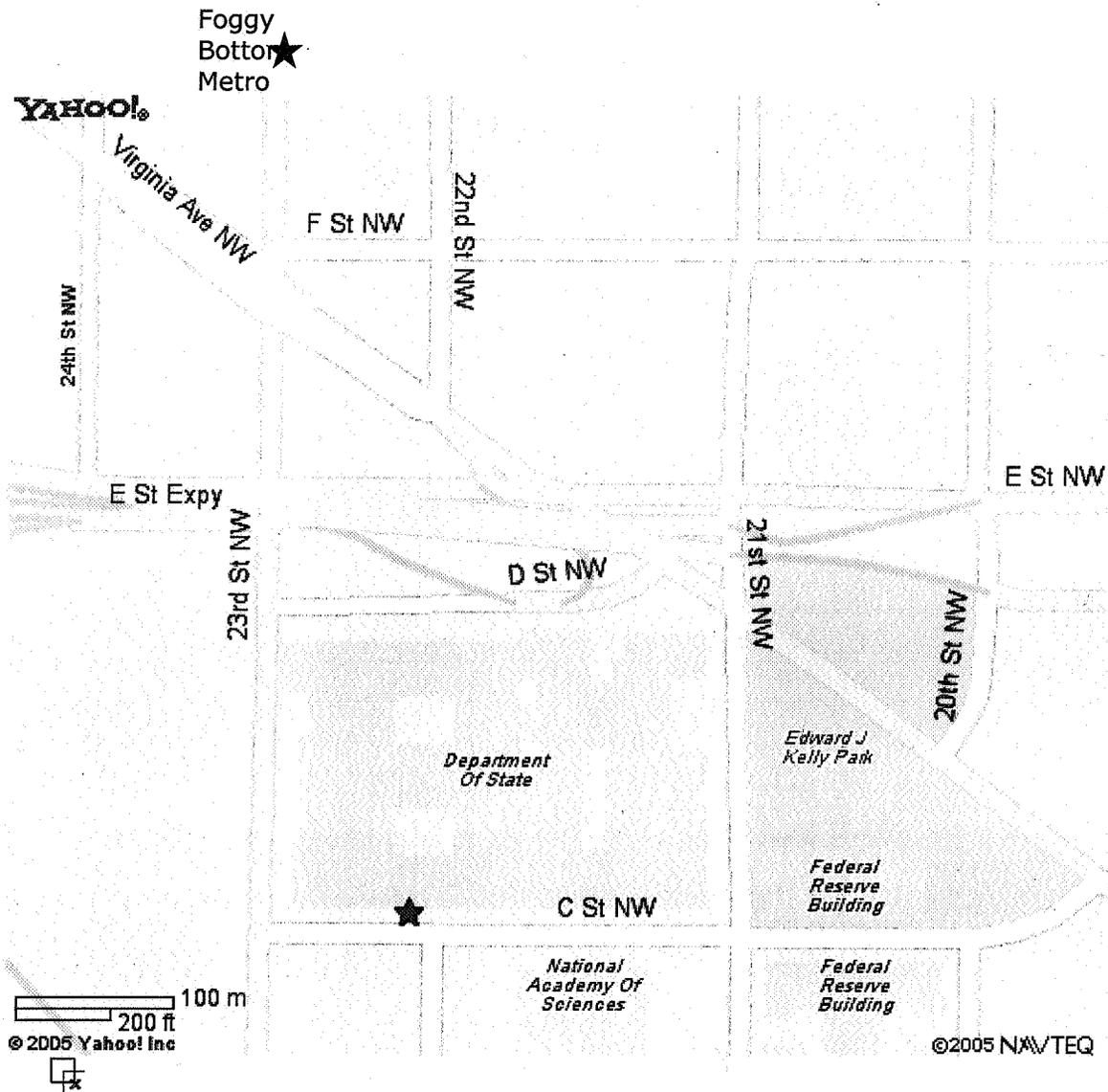
- Opening Remarks and Welcome  
Acting Assistant Secretary Frank Coulter, Chair
- Adoption of Minutes of December 2, 2005 Meeting (Section A)
- Presentation by Brad Higgins, Assistant Secretary for Resource Management and Chief Financial Officer, Department of State
- Accountability/Metrics Committee Report (Juergen Tooren, Chair)  
– Proposal for Policy Revision on Council Representation (Section B)
- Second Annual Customer Satisfaction Survey Results (Peter Hogan)
- Program Assessment Rating Tool (PART) Update  
(Peter Hogan/Crissy Somma)
- Regionalization Update (Will Moser)
- Interagency Working Group Chairperson Report  
(Janet Buechel, Chair) (Section C)
- ICASS Service Center Director Report (Section D)  
(Peter Hogan, Deputy Director and IEB members who attended the EAP or EUR Management Officer/Council Chair Workshop)
- Informational Documents/Cables/Reports (Section E)
- Concluding Remarks – Acting Assistant Secretary Frank Coulter

## Directions to the U.S. Department of State

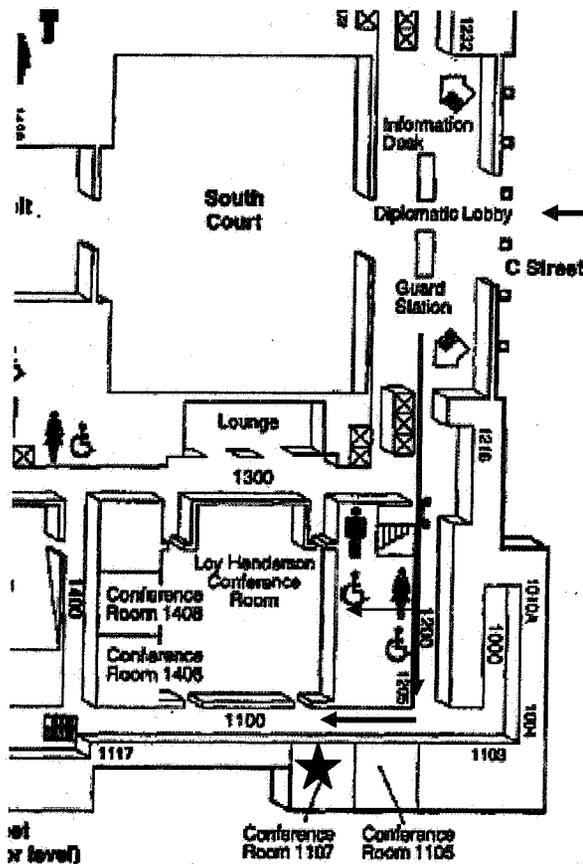
**Address:** Harry S Truman (HST) Building  
2201 C Street, N.W.  
Washington, DC 20520-0000

**Via Metro:** Blue or Orange line to Foggy Bottom. Exit the station and you are on 23rd Street NW. Turn right and walk five blocks to C Street NW. The State Department (HST building) will be on your left. Enter through the C Street entrance. If you have a State Department ID please use it. If not, your name will be on the access list and you will be directed to Room 1107.

**Via taxi:** C Street is closed in front of HST. You should be dropped on the corner of 23rd and C Street and then follow the same directions as above.



## Directions to Room 1107 at State's HST Building



**Enter through C Street**

- \* Check in at Guard Station
- \* Bring Government ID
- \* Go through Security -- Walk-through Metal Detector and X-ray for hand-carried items.
- \* Follow 1200 Corridor on Left till it ends at Corridor 1100, Turn Right on to 1100 Corridor
- \* Conference Room 1107 is third room on Left

# **IOEASS**

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**Minutes of December 2, 2005**  
**IEB Meeting**

**Section A**



International Cooperative Administrative Support Services

**Draft MINUTES**  
**ICASS EXECUTIVE BOARD MEETING**  
**Department of State**  
**December 2, 2005**  
**10:00 a.m. - 12:00 p.m.**

**Principals in Attendance:**

Commerce	Thomas Moore
DHS	Karen Marraud (Acting)
DoD	Gretchen Anderson
FAA	Juergen Tooren
HHS	Robert Morris (Acting)
Intelligence Community	Marion McMahel (Acting)
Justice	Paul Cortis
Library of Congress	Fehl Cannon (Acting)
Peace Corps	George Schutter
Social Security Administration	Vance Teel
State	Frank Coulter
Treasury	Charles Ingram (Acting)
USAID	Carla Royalty (Acting)
USDA	Chuck Alexander

- 1. Opening Remarks from Acting ICASS Executive Board Chair Frank Coulter**  
ICASS Executive Board Chair, Frank Coulter welcomed board members to the Department of State. On behalf of the members he specifically welcomed new IEB member Vance Teel from the Social Security Administration.
- 2. Adoption of Minutes of September 22, 2005 ICASS Executive Board (IEB) Meeting.**  
The minutes for the September 22nd, IEB meeting were unanimously adopted.
- 3. State Department Regionalization Efforts**  
Will Moser, Director - A/GSSI - Following up on his presentation at the September 22<sup>nd</sup> IEB meeting Mr. Moser updated the board on State Department's regionalization efforts. He explained that State has developed a two tier approach to regionalization; focusing first on critical danger posts to remove any non-location activities, and secondly, looking at the remaining posts, identifying and removing non-location activities as appropriate.  
  
Mr. Moser highlighted some of the specifics of the State Department's plan. He reported that the Department is looking at the state-side orientation and in-processing already in place for Iraq and expanding that to other posts so that personnel going to overseas will pass through HQ for orientation. The intent is to relieve post of some of the burden of this process.

Mr. Moser reported that various offices within the Department are examining what of their services can be removed from post. He highlighted several activities already identified for potential regionalization: the appraisal process, the Computer Assisted Job Evaluation (CAJE) process, and operating an off-shore switchboard. He also said that FSI is looking to increase distance learning training.

Mr. Moser reiterated the Department's goal of making improvement to service quality a large part of this regionalization exercise.

#### **4. Office of Rightsizing**

Patrick Truhn from the Office of Rightsizing explained that his office derives its direction/authority from Chief of Mission (COM) authority and that many of the activities that they are involved in are directly related to COM authority.

Mr. Truhn explained how the COM is responsible for the US mission presence in a country, including the size of the mission, mission security, and granting country clearance. He said that his office is working on automating the Country Clearance process, trying to make the process internet based.

Mr. Truhn said that the COM is responsible for the size of the mission. He emphasized that the Mission Performance Plan (MPP) process is vital for planning the size of the mission. He pointed out that in the review of FY05 MPPs only 16.5% of the actual increase in personnel overseas was reflected in these mission plans. He stressed that agencies need to have good communication with their posts so that representatives at post are aware of any plans for changes in the agency presence at a mission so that such changes can be included in the MPPs. Mr. Truhn said that as part of the President's Management Agenda OMB had delegated to the State Department the responsibility of aligning staff overseas with priorities. The Office of Rightsizing works not only with the Department of State but with all agencies in this process. He said that all missions are to conduct a rightsizing exercise every 5 years. The MPP process is a start to the Rightsizing study and conducting analysis of agencies' work toward specific mission goals.

The FY06 MPP cycle includes a requirement for missions to look at the potential for competitive out-sourcing, to look at what work can be done by LES rather than USDH and to identify what work can be performed regionally. Individual posts are to decide the best solutions for themselves through an all inclusive mission wide process.

Mr. Truhn said that the Office of Rightsizing is planning a Rightsizing Conference for all agencies in late winter.

#### **5. ISC Staffing**

Juergen Tooren (FAA) explained the original plan for an ICASS Service Center was for it to be an interagency office housed within the Department of State. The office was to be staffed by personnel from variety of different agencies. Over time, as personnel are made

permanent State employees, this arrangement has been eroded. Mr. Tooren posited whether the board still valued the 'inter-agency' make up of the ISC or if they thought that ICASS has matured to the point that agencies can exert power through the IWG and IEB? If the board still valued detailees then how can it encourage and work with agencies to maintain the interagency aspect of the ISC.

Ismail Asmal (ISC Director) stressed the loyalty of the ISC staff to serving the mission of ICASS and to protecting the interagency processes.

The general discussion indicated that multi agency participation in the ISC is valuable and a benefit to the program. Several options were discussed for maintaining the interagency integrity of the ISC such as creating a foreign service position for people coming back to their HQ offices and creating short term positions within the ISC. Consensus was reached on looking to maintain the interagency aspect of the ISC. The IWG was tasked with looking at different options for multi-agency representation within the ISC.

## **6. IWG Chair Report**

Cheri Caddy (Acting IWG Chair) announced that a new IWG Chair has been selected, Ms. Janet Beuchel. Ms. Buechel is a retired State Department administrative officer. She served in several posts during her career. Her final position prior to retirement was Director of administrative training at the Foreign Service Institute during which she helped set up the first ICASS training courses.

Ms. Caddy reported that the Policy Committee has been delegated two issues by the IWG for policy proposals: a) Transfer of Property; How will assets be managed and accounted for if two ICASS service providers merge operations?, and b) Validation and Verification for ICASS OBO Data; or the Capital Security Cost Sharing Program, how will ICASS position count data be verified? Each agency currently goes through a lengthy process to verify its own headcounts, but how can this be done for ICASS positions, the costs of which are proportionally shared by all?

Ms. Caddy also reported to the board that the IWG Training Committee has been reconstituted and is co-chaired by the Department of State and Foreign Agriculture Service. The Committee sent out a survey to the IWG the results of which should capture which agencies are offering ICASS training as part of their orientation to employees assigned overseas.

## **7. Budget Committee Report**

Crissy Somma (Budget Committee Co-Chair) reported that the initial targets have been forwarded to posts and that initial budgets are due to the ICASS Service Center by December 19<sup>th</sup>. The FY06 targets contain a 7% increase over last year, the lowest increase in the past few years. All agencies are advised that these targets were being approved pending individual agency affordability - - due to pending enacted appropriations. The initial budgets and post invoices submitted will allow agencies to assess the actual impact of ICASS increases on their individual agency invoices.

Jeff Kramer (Budget Committee Co-Chair) said that the approximately \$9M in Alternate Service Provider (ASP) targets had been provided to the eleven missions where USAID is a service provider. He said that this is a \$3M increase over the prior year due to shared service pilots coming on line in FY06, and AID standing up as the ASP in Almaty.

## **7. ISC Director's Report**

Ismail Asmal (ISC Director) reported that the ICASS FY 2006 budget conferences were a success, and that the Web.ICASS software performed as expected. He expressed his kudos to Michelle Frederick and the ICASS Service Center's Software Team for their persistence and dedication in working with the software developer to make this happen.

Mr. Asmal reported that an ALDAC cable was sent from the Department of State's Under Secretary for Management, underscoring the importance of Performance Assessment Rating Tool (PART). OMB has since indicated that ICASS will receive a PART score of 65 out of 100. ICASS is able to report progress for two of its measures: procurement credit card usage and the ratio of Direct Hire American customers to service providers.

Mr. Asmal asked IEB members to consider participating in the second round of ICASS Management Counselor-Council Chair workshops being held later this fiscal year in Manila and Istanbul. Conducted last year in the Western Hemisphere, African, and Near East/South Asia regions, these workshops focus on the partnership between the ICASS Council Chair and the Management Councilor, and on how this relationship can be leveraged to improve ICASS operations at post. One IEB member attended each of these workshops last year to share the perspective and vision of the IEB for ICASS.

Peter Hogan (Deputy Director ISC) provided a presentation of the PART measures for ICASS.

- Overall Customer Satisfaction goal of 90% by 2009
- Satisfaction with Procurement goal of 90% by 2009
- Micro-purchase using ICASS purchase goal of 70% by 2009
- Ratio of USDH customers to service providers 18/1 by 2009
- Annual growth in per capita cost of 4.5%

# **ICASS**

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**Proposal for Policy Revision  
on  
Council Representation**

**Section B**

## ICASS Council Governance Proposal

It has been observed by Management Council – Council Chair workshop participants and others that ICASS Councils vary widely in how they function. Some are:

- very active, with a consensus that they are effective;
- talking shops focused on agency-specific minutiae, or minor cost questions;
- lacking the appropriate focus to command the attention of senior agency heads;
- not very active...with varying interpretations of what this means.

Based on discussions that occurred during the MCCC workshops, and other feedback from ICASS Council meeting participants over the years, the following changes in the way ICASS Councils are organized are offered for consideration.

1. ICASS Councils be formally designated in policy to be composed of cabinet level and independent agency representatives, mirroring the representation on the ICASS Executive Board.

Senior officers representing entities within the same cabinet level Department will agree on which one of them will represent their Department on the Council.

The Council roles will be: to pursue their role as stewards of ICASS resources at post and advocates for quality service at reasonable cost; to approve ICASS budgets; to evaluate the service provider through the preparation of the consensus memorandum; and to review and approve ICASS service standards and performance.

2. ICASS working groups at each post will be composed of all entities at post that a) receive an invoice and b) are empowered by their agencies to participate in budget discussions, mirroring the Interagency Working Group in Washington.

Post working groups will be responsible for ICASS budget review and recommendation to the Council, workload count review and approval, and workload count modification; they will review specific reports in advance of the Council's budget meeting and deal with agency-specific or highly detailed questions.

The proposed changes are based on the assumption that a) senior agency reps' time is valuable, and b) these issues are important. ICASS Council deliberations should be organized around those guiding principles. I believe this model will allow Councils to fulfill their intended role as senior managers and stewards of government resources. Detailed discussions should be focused at the working group level. Individuals working at that level should receive deliverables and deadlines from Councils, who should be decision-makers.

# **ICASS**

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**IWG Chair Report**

**Section C**



International Cooperative Administrative Support Services

CASS Service Center  
U.S. Department of State  
SA-1, Columbia Plaza, Room H1504  
2401 E. Street N.W., Washington, D.C. 20520  
(202) 663-3260 FAX (202) 663-3275

April 27, 2006

TO: ICASS Executive Board

FROM: ICASS Working Group Chair: Janet G. Buechel

SUBJ: Quarterly Report to the IEB

After a lengthy processing period, I assumed the chair of the IWG on February 21, 2006. My initial efforts have focused on reading into the range of ICASS issues and catching up on actions and developments since my retirement six years ago. While some of the issues are the same, there have been many changes and some impressive improvements.

In reading through the files and papers left by predecessors, the ICASS Strategic Plan appears to be the most concise and appropriate vehicle to focus the efforts of the IWG and provide a framework for updating the IEB. I plan to provide an update to the Strategic Plan in the next IEB meeting.

*Summary of Committee Activity:*

1. **Policy Committee:** The Committee finalized a new policy governing the transfer of property in instances where two service providers combine operations. The new policy will be communicated to the field and included in the new Handbook set for publication in a few months. A copy of the policy is included in your notebooks. Also included is a copy of new procedures outlining how policy is made. The IEB has a role in the event the IWG is unable to reach consensus on a proposed policy.

The Department of State issued a worldwide cable (State 5965) on January 12, 2006, outlining new procedures for gathering position data for the Capital Security Cost Sharing (CSCS) Program. Validating and verifying ICASS OBO Data for the CSCS Program has been a concern of the IWG. The new procedures include a mechanism for ICASS Council Chairpersons at post to sign off on CSCS head counts for ICASS personnel, thus providing an

additional level of review. The cable also announced that OBO is working with State/HR to begin using position data from the Post Personnel (PASS) system in FY07, thereby eliminating the need for a separate data call for CSCS. A copy of the cable is included in your notebooks.

Following up on discussions from the December IEB meeting, I have tasked this Committee with exploring options for staffing the ISC to ensure a multi-agency perspective. A proposal will be presented at the next IEB meeting.

2. **Training Committee:** The Committee surveyed ICASS agencies to determine what kind of ICASS training they provided their employees being assigned overseas. Only ten agencies responded to the survey but the ISC has ongoing training relationships with more than a dozen others. Of the respondents, only three indicated they provided no ICASS orientation training. The ISC accepts virtually all requests for orientation briefings and last year provided sessions for 1,124 people in 14 domestic agencies – an 83 percent increase over FY2004. Over the last five years, the ISC has also provided overseas training to a total of 6,954 employees from 121 posts.
3. **IT Committee:** Progress is being made on the longstanding issue regarding access to the ICASS Global Database (GDB) by ICASS agencies domestically. Currently, agency representatives in Washington must come to the ISC and access the GDB on terminals available for their use. Additionally, agencies that use post Mission Program Plans (MPPs) to coordinate budget requests must obtain copies from the Department – a lengthy, time-consuming process. Both the GDB and MPPs are, theoretically, accessible on State's intranet which is currently not remotely accessible to non-State agencies in Washington. Over the years there have been many proposals for providing this access, but technology and/or funding have been constant impediments. But a new approach is under consideration.

In 2005, the Department of State implemented the ONE Program (OpenNet Everywhere) to address intranet access requirements of State employees when they are away from their offices. This program enables users to access OpenNet from any internet-enabled computer using a special fob and a password. As both the MPPs and the GDB are accessible through State's intranet, the Committee proposed to the IWG that a pilot project be requested to test this approach for Washington interagency access to ICASS data. The IWG approved the approach and the ISC prepared a decision memorandum for the State CFO and CIO. The CFO has approved the pilot proposal and the CIO has tasked his staff with exploring the accessibility of the GDB through this approach. We are awaiting their findings to determine if any significant changes (that carry funding implications) would be required to facilitate this access or if it can be done with relative ease. A copy of the Decision Memorandum is included in your notebooks.

## **ICASS Shared Services and Asset Disposition**

As instances of duplication are eliminated and service platforms are combined, the issue of how to combine the capital assets of multiple service platforms arises. This policy covers the transitional period when platforms are combined. The eventual outcome of the move to single service provider platforms will be that new capital assets will be purchased by the working capital fund of the service manager.

### **Background and Scope**

This policy addresses circumstances that arise when the administrative operations of two service providers are combined, bringing together two sets of assets for management by a single service provider. This policy does not address issues related to the entry of a new customer agency into ICASS at a post, or the establishment of, and buy-in by, customers to furniture and appliance pools. Those circumstances are addressed elsewhere in the ICASS Handbook.

This policy specifically acknowledges the legal understanding that, absent specific statutory authority, assets purchased from a single agency's appropriation **may not** be transferred to another entity without compensation to the transferring agency for the value of those assets. This policy does not apply to assets purchased with Trust funds or other non-appropriated funds, which are addressed in a separate section.

A compensation issue arises when an agency that had been providing services to itself contributes assets for shared services managed by the ICASS service provider (for example, if USAID contributes capital assets to a State-managed ICASS service platform, or vice versa). This policy is intended to preclude the necessity for other ICASS customer agencies to pay the compensation described above for assets not required to meet the needs of the customer base prior to the combining of operations.

### **Policy**

In order to avoid the compensation issues described above, this policy separates the ownership and management of transferred assets. The ownership of such assets remains with the original purchasing entity, while management of such assets is transferred to the ICASS service provider at a given post. The following points address specific circumstances and how they are addressed under this policy:

- When USAID/ASP is selected as the single service provider (of a motorpool, warehouse, or other service involving capital assets), it manages all assets in the pool. USAID retains title to assets (e.g., vehicles, forklifts, etc.) purchased with USAID appropriations. ICASS assets brought into the service platform remain the property of the ICASS Working Capital Fund (WCF).
- When State is selected as the single service provider, it manages all assets in the pool. ICASS assets remain the property of the ICASS WCF. USAID assets pooled into the service platform remain the property of USAID.

- Replacement assets are purchased with funds from the agency managing the service platform. Over time as assets are replaced, the service manager will eventually own all assets in the service platform and the separation of management and ownership will no longer be necessary.
- When an asset reaches the end of its useful life, it is returned to the owning agency for disposal. Proceeds of sale realized after disposal are credited to the agency that owns the asset.
- If an agency that has contributed assets to the service platform departs a post, capital assets owned by that agency are disposed of and proceeds returned to that agency, in accordance with existing regulations. Because the agency is departing post, the assets will no longer be needed to service it.
- Where pooling assets results in efficiencies being realized, and there are more capital assets in the service platform than are required to maintain existing service standards, the assets that are closest to being fully depreciated, regardless of ownership, should be prioritized for disposal. The assets should be disposed of by the agency owning the assets, in accordance with existing regulations, with proceeds returned to that agency.

### **Roles and Responsibilities**

A list of separate management and ownership responsibilities for pooled assets is described below. In general where ownership and management of assets is separated, both parties should ensure that their role in the process does not impede the ability of the other to perform its functions.

The service provider agency will:

- Manage and be accountable for all assets in the service platform;
- Repair and maintain (including purchasing spare parts) all assets in the pool;
- Provide data to the owning agency for required asset reporting;
- Depreciate assets for budgeting purposes;
- Budget for replacement assets to be purchased by the ICASS WCF;
- Purchase replacement assets, as approved in post ICASS budgets;
- Return assets at the end of their useful life, and/or if not needed by the ICASS service provider, to the owning agency for disposal.

The agency owning capital assets will:

- Provide all necessary records to the service provider for maintenance, budgeting, and other management requirements;
- Continue to report to headquarters on the management of assets, as required by agency regulations;
- Depreciate assets for financial reporting purposes;
- Upon return on a capital asset at the end of its useful life, take appropriate disposal actions, including the collection and recording of proceeds of sale.

### **Principles**

1. Ownership remains where it originated; consequently, ICASS and the transferring agency do not risk legal issues such as augmenting other agency appropriations;

2. This policy does not require the ICASS community in a particular location to incur extraordinary expenses to increase the size of the asset pool to provide service to an expanded customer base;
3. While this policy does not provide exclusive use of transferred assets by the owning agency, it does in principle afford that agency the full delivery of the service the asset was purchased to provide.
4. This policy improves the potential for increased quality of services and increased efficiencies to the ICASS community by pooling assets in a common service platform.

**Final**

(as approved by IWG 2/8/06)

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January 2006

**How does a New Policy Become Policy?**

1. Issues are brought/referred to the Policy Committee (PC) from the IWG or the ISC. Policy questions raised by the field are generally discussed in the IWG and referred to the PC as needed. It is important to bring up issues in the IWG first to ensure that members know what is to be discussed in the PC should they wish to participate.
2. The PC develops a consensus recommendation and brings it to the IWG for discussion and approval.
  - a. If no consensus reached, the PC presents options to the IWG and requests a vote.
3. The IWG approves a policy (or votes on an option).
  - a. If the policy is not approved, the issue is closed or returned to the PC for additional consideration/ recommendations.
  - b. If no consensus emerges from the IWG, the issue is returned to the PC to prepare options papers/ materials for presentation to the IEB.
4. An approved policy is taken up by ISC or PC, as appropriate, to develop implementation procedures.
  - a. The ISC coordinates with State Department entities (e.g., OPE, L, etc.), as required, to obtain clearances.
5. New policy and procedures are sent via cable to posts.
  - a. Pursuant to State Department guidance regarding new policies, a policy enters into effect for 6 months once transmitted via cable.
6. The policy cable is posted on ICASS web site in area designated for policy documents (distinct from operational guidance).
  - a. All policies/policy cables posted on the website should follow a standard format
  - b. All policies posted on the web site must include an effective date.
7. New policies and procedures are collected and saved for the next Handbook update cycle.
8. Once policy cables have been subsumed into the Handbook, they should be placed in an archive on the ICASS web site.

The two sources of official policy are the ICASS Handbook, and policy cables (including any accompanying implementation procedures).

Attachment 3

R 121959Z JAN 06  
FM SECSTATE WASHDC  
TO ALL DIPLOMATIC AND CONSULAR POSTS COLLECTIVE  
USLO TRIPOLI

UNCLAS STATE 005965

INFORM CONSULS  
BELGRADE PASS PODGORICA  
KINSHASA PASS BRAZZAVILLE  
LIBREVILLE PASS SAN TOME  
FOR: MANAGEMENT OR PRINCIPAL OFFICER;  
EMBASSIES ALSO PASS TO CA OFFICES

E.O. 12958: N/A  
TAGS: ABLD, AMGT, AFIN  
SUBJECT: Capital Security Cost-Sharing (CSCS) Program - Upcoming  
Survey, Lessons Learned and New Processes

REF: 05 State 033937

1. Summary: This cable is to announce the upcoming Capital Security Cost-Sharing (CSCS) FY08 survey and outline new processes and share some lessons learned.
2. Position Survey: OBO will initiate the CSCS survey of posts by the close of January 2006. At that time, OBO will survey for current, authorized positions in place as of January 1, 2006. Posts will receive a cable with details on how to download and complete the survey. The position survey will be very similar to last year. The data that posts provided last year will be pre-populated within the survey tool. Posts will only need to make corrections to the data, add new positions or discontinue those that have ended or are to be abolished. If your post did not use the CSCS Survey tool last year, entry of all positions will be necessary. Posts will have 45 days from the Survey cable date to return the data to OBO.
3. Who should respond: A list of posts that should respond to the CSCS survey is available on the link below and is discussed later in this cable. To access the response list, please use the following link.  
(<http://obo.state.gov/Capital%20Security%20Cost-Sharing.htm>)  
End summary.
4. Overview of CSCS Program: The CSCS Program is designed to raise approximately \$1.4 billion a year to fund the construction of NECs that will provide USG employees secure, safe, functional workplaces overseas. The program runs from 2005 - 2018 and will ultimately fund construction worth \$17.5

billion. To accomplish this, the CSCS Program allocates charges to all agencies under Chief of Mission authority on the basis of the number and type of positions each agency has overseas. To implement the CSCS Program, the Department requires an accurate count of all existing and authorized positions at each post.

5. The difference between this data call and the LROBP FY2007-FY2012 data call: Each post is required to complete either an LROBP survey in connection with proposed NECs or a CSCS Survey. 67 posts have been tasked to complete the LROBP survey and the remaining 257 posts and locations must respond to the CSCS survey. For clarification on the posts and locations from which we are expecting data, please view the "FY08 Post Survey Response List" at: <http://obo.state.gov/Capital%20Security%20Cost-Sharing.htm>

6. Embassies that complete rightsizing reports in connection with a proposed NEC at one of their locations will still need to ensure the completion of the CSCS survey for all other locations in the country. The rightsizing report will not provide the necessary detail about the other locations for CSCS purposes. Again, please review the list mentioned above to determine each post's required response.

7. Any post or location may respond directly to the CSCS survey or it can be completed on their behalf. Embassies will need to coordinate and/or delegate the responses from each in-country location. Each location will have its own position profile in the survey. Each profile should contain only that location's position data.

8. New Processes: After consultations with M/R, RM, and HR, OBO has implemented several new processes that will facilitate a more accurate survey process and improve the quality of the incoming data.

a. Sign off at Post: To achieve greater accuracy, we have implemented a more structured verification checklist to be completed at post before the final submission of the data. During this upcoming survey effort, posts will now be required to provide OBO a form signed by the ICASS Council Chair and Management(or Principal)Officer at post that certify the data is correct. The certification form will require the names and contact information of the representative from each agency at post who confirmed the data. The Management Officer at post will provide final signature verifying the accuracy of the State Department positions as well as the overall validity of the submission. The form, which will be made available during the data "checkout" process, will need to be faxed to OBO immediately upon completion of the survey and submission of the data. Posts' responses will not be considered complete until this signed form is transmitted to OBO.

The signing Management or Principal Officer will receive an email confirming receipt.

b. Review in Washington: Once OBO receives and processes each post's data, we will transmit the State Department and ICASS position data to each Regional Bureau for an official review, with copies to HR, M/R, the ICASS Working Group and RM/BP.

c. More Guidance for Posts: We are expanding our support to include the following: Detailed Instructions on the website, quick reference guides through the survey tool, a 'Lessons Learned for FY08' memo available on the web, live help desk support via telephone and email during the survey period Monday thru Friday from 8:30 am to 5:30 pm EST, live help desk support by appointment outside normal business hours, technical help via email or phone, help links embedded in the survey tool, FAQs from posts during FY05, and additional documents posted on the CSCS website.

d. Future Use of the HR PASS system: OBO has started work with HR technical teams to implement changes that will enable OBO to obtain the position information for the CSCS Program directly from the Post Personnel (PASS) system, as opposed to conducting its own data calls. Once the system is in place, OBO will utilize PASS information for position data. This will reduce workload on Posts by eliminating separate CSCS surveys. It is anticipated that OBO will utilize the PASS system for data collection during the next data call in FY07. Posts may want to update their position data in PASS in conjunction with this CSCS data call.

9. Lessons Learned: If all Posts follow this guidance in preparation we can reduce some of the most prevalent errors occurring in the data.

a. Start Early: Reduce deadline time crunches due to unforeseen IRM issues or requirements in the data correction/entry tasks by beginning the work earlier rather than later. Posts will have 45 days to complete the survey once the Survey cable is received.

b. Do not combine one location's position data under the profile of another location. A profile will exist in the tool for each and every location on the web list. If a post or location does not appear on this list, data is not expected from that location. Please contact the CSCS staff if you think a location should, in fact, be included.

c. Coordinate with Agencies: Like last year, Agencies will be contacting posts in the Spring to clarify any disputes on the positions reported for their agencies. Agencies

will have access to the names of their representatives at post that vetted the data submitted to OBO. No changes to the data will be made by OBO without written concurrence from post supporting the requested change or dispute. OBO asks that posts remain responsive to these Agency requests. Unlike last year, additional parties will be reviewing position data for the Department. The position data will be provided to the Regional Bureaus for review, and posts should be aware of this new level of involvement.

d. Avoid Common Data Mistakes:

- 1) Include all vacant and unfilled positions.
- 2) Include all Guards, Janitors, Drivers, and other non-office positions that are associated with the post.
- 3) Do not include any guards or other positions that are associated with any residential facility.
- 4) Do not include positions that fall under the Department of Defense Regional Command.
- 5) Carefully identify all post ICASS-funded positions: Accuracy in this field is critical. Please double check the data against the list of personnel reported annually to the ICASS Service Center.
- 6) Carefully identify positions that are "never to be co-located". This field should only be checked if the position fits the definitions found in the CSCS Guidance Memo on the website and in instructions accompanying the Survey Tool.
- 7) Begin Date and End Date for positions: These fields have not been required on previous surveys, but will now be required for all positions. This field will help more clearly identify those positions that are "planned or projected" as opposed "current and authorized". More detailed guidance and assistance will be provided in the instructions with the survey tool. Although the CSCS survey only calls for current, authorized positions, oftentimes projected positions appear in some posts' data due to their LROBP participation. Use of the dates field will help keep current positions properly identified.
- 8) Requirements, not reality: In many situations at post, the reality of a position may not match what is technically required for it. For example, a position may be located in CAA space simply due to a lack of space in non-CAA space. Another example is when position incumbent utilizes a desk, when that position's requirements technically do not call for a desk. Please complete the

CSCS survey based on what is technically required for each position, not what may actually occur in reality.

10. Please recognize that errors in the data can have direct and significant financial consequences for both the Department and agencies. For example, misclassification of a position as "CAA" vs. "Non-CAA" is a \$24,188 overcharge, reporting "Agency X" positions erroneously under "Agency Y" could have an impact up to \$40,579 each, and failing to tag ICASS positions correctly causes the Department alone to bear significant, unnecessary costs. Please provide the data verification process the careful attention it requires.

11. Thank you for your assistance: OBO would also like to take this opportunity to thank again posts for their participation during last year's survey effort. OBO obtained a 100% response rate to this data call of worldwide positions. Your efforts on that CSCS survey, using our newly designed electronic survey tool, resulted in the validation of information on over 75,000 overseas positions. We are looking forward to an equally successful survey effort this year.

12. Contact Information and Assistance: If you have questions about the survey or the CSCS program that are programmatic or content-related in nature, please contact Kelly Denton at [dentonKB@state.gov](mailto:dentonKB@state.gov) or 703 516 1980. If you have technical, system or IRM related questions or problems, please utilize the Help button in the system tool and on the main screens. Your utilization of this button will capture keystrokes and system information in an email that is crucial for technical problem solving. We will treat your queries with a sense of urgency and will make every effort to respond within 24 hours.

Minimize Considered.

RICE





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**ISC Director Report**

**Section D**



International Cooperative Administrative Support Services  
An Interagency Program Administered by the U.S. Department of State

ICASS Service Center  
U.S. Department of State  
SA-1, Columbia Plaza, Room H1504  
2401 E. Street N.W., Washington, D.C. 20520  
(202) 663-3260 FAX (202) 663-3275

April 27, 2006

TO: ICASS Executive Board

FROM: ISC Deputy Director - Peter Hogan

SUBJECT: ICASS Report for April 2006

The FY 2006 ICASS final targets were approved last month by the ICASS Budget Committee, and post budgets are due this week. At a total funding level of \$1.23 billion, the dollar increase represents about 5 percent growth over last year. Cost per capita to support direct hire Americans grew by 1.9 percent, the lowest since 2001.

The ICASS web site displays some new reports since the last meeting of the IEB. These reports show time series data by post and cost center, from FY 2000 to FY 2005, and include information on full-time equivalent (FTE), workload, and cost for each cost center. The costs are broken out into personnel, operational, and investment categories (with the latter derived from equipment and depreciation). Costs per FTE and per unit of workload are displayed for each cost category. This data can be used to compare costs over time at one post, and to identify relative costs among posts. Your briefing books contain the introduction and a page of the report from the web site.

The Program Assessment Rating Tool, OMB's evaluation process for Federal programs, is being updated with new data for ICASS. This data includes the new Customer Satisfaction Survey data, plus data on per capita cost, procurement card usage, and the customer to service provider ratio.

The ISC hosted, with USAID/Washington, a conference attended by Alternate Service Provider (ASP) practitioners. The group, composed of Locally Engaged Staff and a few Americans from USAID missions providing ICASS ASP services, viewed the latest developments with the ASP software and brought their perspective to discussions about issues affecting service delivery. With the recent joint guidance to the field from the Under Secretary for Management and the USAID Deputy Administrator, the role of USAID as an ICASS ASP is expected to

grow. (This cable is included in your packets.) The ISC will be hosting a presentation by Patrick Robinson, Executive Officer, USAID/Almaty, on the transition of USAID to become the ICASS service provider in Almaty, Kazakhstan after the embassy moves to Astana this summer. This event will take place at 10:00 on Monday, May 15, in the ISC's large conference room.

For two years, ICASS policy has included a provision to bill agencies for 70 percent of their prior year's final invoice as a way to recapitalize the ICASS Working Capital Fund. This is necessary to insure adequate cash flow in the fund. In both of these years, many agencies have not paid their bills within the 90 day window allotted to them. This lack of payment prevents the goal of the policy – fund recapitalization – from being achieved. The ISC has proposed to the IWG a new policy that would include the option to terminate services to non-paying agencies at the 90 day point, rather than the full 270 days allowed under current policy. There is a role for the IEB anticipated in the new policy. The IEB would be informed of the delinquent agencies at the 90 day mark, and then would rule on whether service suspension should occur immediately, or whether the agency should be engaged to allow it to make payment before the cut-off is implemented.

Such a role for the IEB has a two-fold purpose. It allows agencies who believe they have circumstances justifying their non-payment to make their case to the Board, and brings the weight of the Board to bear on agencies that are unable to present such a case, but simply have not paid due to circumstances that have no bearing on their ICASS liability. The IWG is reviewing the proposed policy change and will address it at their May meeting. If approved by the IWG, IEB concurrence will be sought in time to implement the policy for the final invoices this year.

The ISC has completed the second round of Management Counselor – Council Chair (MC3) workshops this year. Held last year in the Western Hemisphere, Africa, and Near East/South Asia regions, the workshops were hosted this year in Manila and Istanbul for the East Asia and Pacific and Eurasian Bureaus, respectively. These workshops bring together these two key ICASS players from every post in the region to explore issues related to their partnership. The goal is improve the working relationship between them to enhance the workings of ICASS at their posts. IEB members Frank Coulter from State, Dr. Paul Cortis from Justice, and Chuck Alexander from Agriculture attended the Manila workshops, and Juergen Tooren from FAA and George Schutter from Peace Corps participated in Istanbul. I invite any of them at this time to briefly share their perspective on the experience.

# **IOEASS**

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**Informational Documents/  
Cables/Reports**

**Section E**

## Introduction: Interpreting the Data in This Report

Respondents to this survey were asked to rate their agreement with the following three statements:

- The service provider understands my needs.
- The service provider welcomes my feedback and uses it to improve service.
- Overall, I am satisfied with this service.

Depending on the services they received, respondents could have rated their agreement with these items for as many as 28 ICASS-provided services:

### Personnel Services

American Personnel Services

Locally Employed Staff Services

### Community Liaison Office Services

### Financial Management Services

Budgets and Financial Plans

Accounts and Records

Payrolling

Vouchering

Cashiering

### General Services

Vehicle Maintenance

Administrative Supply

Procurement

Reproduction

Shipping and Customs

Direct Vehicle Operations (Motor pool)

Non-Expendable Property Management

Leasing

Travel Services

Furniture, Furnishings, and Appliance Pools

### Communications (Information Management Services)

Pouching

Mail and Messenger

Reception and Switchboard

### Other

Basic Package

Health Services

Computer Services

Non-Residential Local Guard Program

Security Services

Residential Building Operations/Maintenance

Non-Residential Building Operations/Maintenance

## Introduction: Interpreting the Data in This Report

In addition, each respondent rated ICASS services as a whole. Note that references to "overall ICASS" satisfaction refer to responses to this question, not a calculated average based on responses to specific ICASS services received. Each of these services was rated according to the following scale, which is the basis for the statistics provided in this report:

Strongly disagree = 1

Disagree = 2

Neutral = 3

Agree = 4

Strongly agree = 5

### Definitions

**Mean:** Arithmetic average--the sum of scores divided by the number of cases.

**Standard deviation:** A measure of dispersion around the mean. In a normal distribution, 68% of the cases fall within one standard deviation of the mean and 95% of the cases fall within two standard deviations. For example, if the mean age is 45, with a standard deviation of 10, 95% of the cases would be between 25 and 65 in a normal distribution (the square root of the variance).

**N:** The number of rating scores provided. Does not include cases in which respondents were not able to rate agreement with a particular item, or for which they did not receive the service in question.

## About the ICASS Customer Satisfaction Survey

In the summer of 2004, APQC began work with the U.S. Department of State to develop a customer satisfaction survey that could be administered globally to U.S. diplomatic posts. This effort, launched in the fall of 2004, collected over 18,000 completed surveys from approximately 190 posts worldwide. The customer satisfaction survey was repeated this year, with the survey running from January 17, 2006 to February 10, 2006. In this go-round, the survey collected over 25,000 surveys from 217 posts worldwide.

The survey gave respondents, whether from the U.S. Department of State or other agencies, an opportunity to evaluate the administrative support services provided by the International Cooperative Administrative Support Services (ICASS). Anyone receiving ICASS services at any U.S. embassy was eligible to complete the survey. The desire was to collect responses not only from direct-hire American employees, but also from family members, locally employed staff, third-country nationals, and personal services' contractors.

### About APQC

An internationally recognized resource for process and performance improvement, APQC helps organizations adapt to rapidly changing environment, build new and better ways to work, and succeed in a competitive marketplace. With a focus on productivity, knowledge management, benchmarking, and quality improvement initiatives, APQC works with its member organizations to identify best practices, discover effective methods of improvement, broadly disseminate findings, and connect individuals with one another and the knowledge, training, and tools they need to succeed. Founded in 1977, APQC is a member-based nonprofit serving over 500 organizations around the world in all sectors of business, education, and government. APQC has conducted more than 625 benchmarking and improvement projects, trained more than 16,000 people in 36 nations in benchmarking, knowledge management, and performance and process improvement.

Survey Results - By ICASS Cost Center

	2006										2005									
	AF	EAP	EUR	IO	NEA	SA	WHA	Worldwide	AF	EAP	EUR	IO	NEA	SA	WHA	Worldwide				
Overall ICASS Services	3.93	4.07	3.98	3.98	3.96	4.09	3.93	3.98	3.93	4.04	3.97	4.01	3.94	4	3.89	3.95				
American Personnel Services	n=4346	n=4116	n=6978	n=89	n=2434	n=1496	n=4895	n=24354	n=2972	n=2584	n=5797	n=138	n=1813	n=922	n=3713	n=17939				
Locally Employed Staff Services	n=529	n=576	n=1177	n=28	n=406	n=177	n=788	n=3661	n=785	n=732	n=1636	n=46	n=561	n=229	n=1024	n=5023				
Community Liaison Office Services	n=1535	n=1708	n=2508	n=23	n=843	n=589	n=1677	n=8893	n=1522	n=1377	n=3098	n=64	n=926	n=463	n=1926	n=9376				
Budgets and Financial Plans	n=1204	n=1281	n=2587	n=50	n=885	n=300	n=1691	n=7998	n=1167	n=1082	n=2689	n=71	n=785	n=241	n=1548	n=7563				
Accounts and Records	n=937	n=820	n=1841	n=36	n=565	n=386	n=851	n=5436	n=788	n=577	n=1439	n=43	n=449	n=232	n=740	n=4248				
Payrolling	n=689	n=667	n=1430	n=28	n=432	n=363	n=709	n=4318	n=625	n=532	n=1334	n=54	n=369	n=201	n=734	n=3849				
Vouchering	n=1538	n=1860	n=3323	n=46	n=993	n=670	n=2060	n=10490	n=1271	n=1240	n=2936	n=77	n=857	n=398	n=1903	n=8682				
Cashiering	n=1191	n=1433	n=2632	n=42	n=797	n=496	n=1647	n=8438	n=1063	n=1043	n=2807	n=70	n=711	n=336	n=1358	n=7188				
Vehicle Maintenance	n=1942	n=2187	n=4263	n=69	n=1264	n=678	n=2293	n=12696	n=1491	n=1377	n=3698	n=88	n=1032	n=478	n=1786	n=9848				
Administrative Supply	n=603	n=338	n=1098	n=8	n=332	n=172	n=434	n=2986	n=472	n=295	n=897	n=15	n=317	n=428	n=405	n=406				
Procurement	n=1506	n=1612	n=3085	n=50	n=931	n=678	n=1883	n=9745	n=1315	n=1175	n=2815	n=78	n=850	n=423	n=1684	n=8340				
Reproduction	n=1650	n=1476	n=3272	n=46	n=1016	n=671	n=1887	n=10018	n=1313	n=1168	n=3000	n=78	n=916	n=598	n=1621	n=8484				
Shipping and Customs	n=493	n=367	n=803	n=27	n=216	n=289	n=596	n=2731	n=477	n=370	n=895	n=40	n=296	n=139	n=693	n=2790				
Direct Vehicle Operations (Motor pool)	n=1292	n=1163	n=2555	n=38	n=1032	n=469	n=1769	n=8318	n=1089	n=867	n=2384	n=63	n=810	n=383	n=1470	n=7066				
Non-Expendable Property Management	n=1515	n=1067	n=2514	n=40	n=860	n=551	n=1579	n=8126	n=1249	n=931	n=2206	n=57	n=791	n=416	n=1379	n=7029				
Leasing	n=941	n=845	n=1713	n=13	n=588	n=414	n=807	n=5321	n=1249	n=831	n=2206	n=57	n=791	n=416	n=1379	n=7029				
Travel Services	n=377	n=410	n=804	n=17	n=297	n=111	n=558	n=2574	n=364	n=679	n=1589	n=27	n=546	n=280	n=785	n=4810				
Furniture, Furnishings, and Appliance Pools	n=1623	n=1507	n=3560	n=49	n=1170	n=690	n=2154	n=10753	n=1358	n=1217	n=3129	n=65	n=972	n=477	n=1741	n=8659				
Pouching	n=79	n=806	n=768	n=0	n=186	n=188	n=80	n=1807	n=973	n=896	n=2137	n=25	n=727	n=347	n=1192	n=6297				
Mail and Messenger	n=1509	n=1032	n=2241	n=51	n=645	n=498	n=1240	n=7216	n=1370	n=997	n=2518	n=80	n=708	n=419	n=1377	n=7469				
Reception and Switchboard	n=1827	n=1951	n=3663	n=54	n=1264	n=736	n=2554	n=12041	n=1336	n=1330	n=3102	n=83	n=988	n=431	n=1878	n=9208				
Basic Package	n=1763	n=1663	n=3750	n=55	n=1074	n=805	n=2445	n=11545	n=1687	n=1298	n=3370	n=89	n=1029	n=536	n=2186	n=10085				
Health Services	n=571	n=554	n=1029	n=24	n=347	n=186	n=661	n=3352	n=754	n=686	n=1732	n=58	n=472	n=207	n=1015	n=4924				
Computer Services	n=1137	n=1128	n=2332	n=42	n=916	n=377	n=1657	n=7589	n=1422	n=1265	n=2914	n=86	n=1020	n=431	n=1864	n=9002				
	n=1823	n=2019	n=4133	n=63	n=1203	n=787	n=2703	n=12731	n=1593	n=1457	n=3611	n=80	n=1098	n=515	n=2200	n=10554				

Survey Results - By ICASS Cost Center

	2006										2005									
	AF	EAP	EUR	IO	NEA	SA	WHA	Worldwide	AF	EAP	EUR	IO	NEA	SA	WHA	Worldwide				
Non-Residential Local Guard Program	3.9 n=856	4.24 n=1101	4.2 n=2113	4.58 n=31	4.24 n=552	4.14 n=392	4.03 n=1103	4.14 n=6148	4.01 n=746	4.19 n=795	4.19 n=1689	4.23 n=62	4.29 n=509	4.02 n=222	4.08 n=869	4.14 n=4992				
Security Services	4.09 n=853	4.2 n=1475	4.16 n=1568	4.16 n=31	4.23 n=786	4.19 n=360	4.09 n=1587	4.15 n=6660	4.13 n=1297	4.2 n=1046	4.18 n=2676	4.15 n=62	4.25 n=818	4.12 n=396	4.14 n=1646	4.17 n=7941				
Residential Building Operations/Maintenance	3.7 n=856	4.16 n=887	3.94 n=1902	4 n=7	3.81 n=617	3.93 n=323	3.69 n=1149	3.87 n=5741	3.78 n=958	4.09 n=743	3.98 n=2053	3.85 n=20	3.99 n=688	3.99 n=327	3.76 n=1152	3.92 n=5951				
Non-Residential Building Operations/Maintenance	3.95 n=746	4.15 n=832	3.91 n=1555	4.08 n=24	3.98 n=445	4.16 n=363	3.93 n=824	3.89 n=4889	3.92 n=629	4.12 n=560	3.98 n=1367	3.89 n=96	4.05 n=405	4.01 n=216	3.94 n=772	3.99 n=3985				

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2ND CORRECTED COPY (TEXT)

FROM U/S FORE AND DEPUTY ADMINISTRATOR SCHIECK

CORRECTED COPY (ADDING CLEARANCE)

E.O. 12958: N/A  
TAGS: AMGT, KMRS  
SUBJECT: CONSOLIDATING SHARED ADMINISTRATIVE SUPPORT  
SERVICES AND ELIMINATING DULICATION - II

REF: (A) 05 STATE 220652

1. This message clarifies, updates, and supersedes reftel.
2. SUMMARY: Current budgetary pressures combined with the continued challenges of the overseas security environment underscore the need to provide the most efficient support services in the safest possible locations. We, as good stewards of the American public's resources, are committed to meeting this need. Rightsizing agency presence in New Embassy Compounds, centralizing and regionalizing business lines, empowering locally-employed staff, outsourcing and eliminating duplication in services are all part of this effort. Elimination of duplicative structures for support services delivery has been and remains a core objective in this effort. Lessons learned from both last year's shared services pilots are outlined in paragraph 6.
3. In addition, the shared services team that visited Embassy Nairobi has developed a strategy for consolidation that merges State and USAID General Services into a streamlined, unified operation with one ICASS invoice and jointly managed by State and AID. In principle, we recommend this general concept as a new model for all agencies overseas with duplicative service models, not just ICASS and USAID, particularly at posts where service providers are already co-located. This process is outlined in paragraph 8. The formal rightsizing process underway for new embassy construction offers even greater opportunities for co-location and consolidation, however,

and should result in more closely integrated operations. This issue is addressed in paragraph 10.

4. Chiefs of Mission and USAID Mission Directors should lead the effort at their posts to identify and fully support efforts to eliminate duplicative services, consolidate and re-engineer support services, while ensuring full programmatic support for all serviced customers. Paragraph 8 contains an action request for all posts. END SUMMARY

5. OBJECTIVES: Congress and OMB have made it clear that we must seek more efficient, lower-cost ways of doing business. The Secure Embassy and Counterterrorism Act of 1999 requires the co-location of all USG staff overseas in all new embassy compounds (NECs). The Office of Rightsizing the United States Government Overseas Presence (M/R) has a clear mandate from Congress to ensure that staff numbers and locations are aligned to meet our foreign policy priorities overseas. The ICASS Executive Board (IEB) has made cost containment of support services a priority, which we support. There are many reasons for budgetary growth in ICASS, but the overall goal should be a reduction in ICASS unit costs. Achieving this objective will involve numerous changes to how we do business: eliminating duplicative services and redundant staff, outsourcing functions that are not inherently governmental when more cost-effective to do so, and centralizing/regionalizing functions that do not need to be performed at post. We must do so with a sense of urgency, but also with full transparency, and strategic purpose. Post management should make themselves aware of the requirements of these efforts by reviewing information found on the State M/R and USAID EXO Tool Box web sites. Appropriate work objectives to achieve successful and sustained results in these areas should also be considered for the upcoming evaluation cycle.

6. PILOT PROGRAMS LESSONS LEARNED: The recent shared services pilots sponsored by the State/AID Joint Management Council, in Cairo, Dar es Salaam, Jakarta, and Phnom Penh, have established that significant operational efficiencies and some cost savings can be realized through the consolidation of duplicative services. Although regulatory and technical obstacles at the agency levels limited the impact of operational efficiencies achieved, JMC working groups have made real progress in addressing many of these obstacles. For example, a lease waiver form and standard lease document are ready for implementation, USAID will begin to utilize WEB PASS Post Personnel module in the near future, a joint USAID/State unified real property Asset Management Plan has been developed, and policy guidance has been prepared for the transfer of property under ICASS. As part of the consolidation, pilot

posts re-engineered business processes and updated standard operating procedures, improved communications with customers, improved equity in service levels, identified and expanded best practices, and optimized or reduced workspace requirements. Careful workforce planning enabled posts to identify the best employees from both service providers to create a stronger and leaner combined organization. Elimination of positions through attrition and abolition of vacant positions minimized the negative impact on local staff. Posts contemplating future consolidation, particularly those moving into NECs within the next two years, are cautioned not to create new positions or to fill vacancies until a decision has been taken on the staffing requirements of a combined operation. A full report of the evaluation of the pilots is available on the A/GSSI website at [a.gssi.state.gov](http://a.gssi.state.gov).

7. NEW MODEL: A study sponsored by the ICASS Council at Embassy Nairobi, in anticipation of the co-location of USAID on the Embassy compound, recently concluded that the creation of a combined or single mission administration unit would achieve the best results in delivering quality services at the lowest cost. This new model makes use of the Alternative Service Provider module in the ICASS software and new costing templates which for the first time provides us with an accurate comparison of costs between services provided by USAID and ICASS. A combined organization will build on the best practices and talents of post's well-performing service providers.

8. SINGLE SERVICE PROVIDER/ACTION REQUESTED: There are many organizational issues that need to be resolved in Washington to implement this single administrative structure referred to in para. 7. Before actual consolidation can occur, additional analyses should be undertaken to determine the overall cost impact to the USG and all customer agencies to implement this single service provider. This analysis needs to show that the formation of the single provider will over time be more cost effective for the USG. We assume for this to occur that business practices will have to change, including greater use of local staff, outsourcing, and regionalizing certain services. Posts should identify the most effective options for reducing support costs and improving service. Once the analysis has been completed, and if practicable, missions should proceed to consolidate services under a single service provider for each service, assigning some services to ICASS as the sole provider (USAID to buy in) and some services to USAID as the single service provider.

9. INFORMATION MANAGEMENT: The JMC Information Management Working Group has been charged with achieving consolidation of the overseas information management infrastructure. Further guidance will be sent to the

field as this process is refined.

10. NEW EMBASSY COMPOUNDS AND RIGHTSIZING: For over a year now, all embassies receiving a New Embassy Compound (NEC), as well as all other missions on a five-year cycle, have been required to complete a rightsizing study, approved by the Office of Rightsizing the United States Government Overseas Presence (M/R). One of the premises of this study is that duplicative functions will be eliminated. Since the rightsizing study has an approximately five-year lead time before a new facility is occupied, this process allows posts to adopt a much more developed strategy to consolidate services than is possible under the short-term approaches described above. At a minimum, M/R assumes that in new construction all administrative functions will be co-located, and all functions currently provided by ICASS will be consolidated, although M/R leaves to post discretion all decisions on which agency/agencies will provide what services. Posts need to ensure that their decisions on which positions are eventually abolished as part of this consolidation are taken interagency and in a completely fair and transparent manner. Competitive sourcing has also been introduced as part of the rightsizing exercise; in some cases it will result in the outsourcing of functions currently performed by both ICASS and USAID staff. As part of the rightsizing process, posts are also asked to identify functions currently performed by U.S. direct-hire employees which can be performed by locally-employed staff.

11. FUNCTIONS THAT SHOULD BE REVIEWED AS POTENTIAL FOR CONSOLIDATION: Functions that should be reviewed as potential for consolidation include: (1) Administrative Support Functions: warehouse management, expendable supplies, functional and residential property leasing, motor pool, residential and non-residential maintenance, customs and shipping, custodial services, reproduction services, mail and pouch services. With both agencies' severely limited funding, cost should be a primary consideration for all service recipients, including privatization alternatives. (2) Financial management functions: cashiering and FSN payroll processing. (3) Procurement functions: non-programmatic simplified acquisition procurement, e.g., administrative procurement of goods and services (not to include personal services contracting); does not include contracting, grant-making, and related contract management functions that implement USAID strategic programs. (4) Human Resources Functions: recruitment, "at post" language training for Americans, expanded Eligible Family Member program, FSN initiatives, and joint IT systems - specifically Human Resources Information Systems (HRIS), under eGov's HR Line of Business, and Learning Management System (LMS). USAID will retain hiring and classification authority for all

staff acquisitions, and will continue to perform its non-ICASS-equivalent HR functions. (5) Technology: Maintenance and service for all local networks, desktop hardware, printers, fax machines, video conferencing, telephone services, office automation servers, electronic mail systems and administrative software, servicing of all hardware and non-proprietary software. For those functions that are unique to supporting USAID operations and are not mentioned in this paragraph as subject to consolidation will not be co-located for NEC planning purposes.

12. FUNCTIONS NOT SUBJECT TO CONSOLIDATION: USAID technical and program management, and legal advisory USAID functions and non-administrative staff associated with these functions are not subject to consolidation. This would include all USAID technical areas such as democracy, education, health, disaster and humanitarian assistance and crisis mitigation, economic growth and trade, environment, agriculture, food for peace, general development programs, financial management activities that support programmatic functions, and program management functions.

13. MANAGEMENT PRINCIPLES: We appreciate that what we are asking you to do is difficult, sensitive, and involves profound change for American and locally-engaged staff. Here in Washington we are strongly committed to a dialogue and decision making process that is transparent and participatory. Consolidation decisions under any scenario, including rightsizing, should be based on the best way of providing services at the lowest possible cost, with fairness to all agencies' staff, both American and local, in terms of employment opportunities and services provided. We ask for the same spirit of openness, fairness, and participation in the field. Posts should develop plans for evaluating the staff in the consolidated organization that utilize these principles.

14. ASSISTANCE AVAILABLE: State's Office of Global Support Services and Innovation (A/GSSI) has worked with its USAID counterparts through the JMC Shared Services Working Group to develop step-by-step templates for costing analysis and consolidation planning and shared services team that can visit post and assist with the analysis. These will be reported septel. These templates, along with evaluation reports from the pilot posts, are posted on their website at [a.gssi.state.gov](http://a.gssi.state.gov) and the USAID EXO Toolbox. The working group will also provide guidance, regulations, and standard procedures for property management, work orders, property transfers, and leasing as they become available. In addition, the JMC at its latest meeting created a Rightsizing and Regionalization Working Group led by Patrick Truhn, State, and Carla Royalty, USAID, which will be exploring these issues in greater detail. Offices

available to help posts in this process, all of which should be slugged for action on telegrams from the field, are: A/GSSI - contact Crissy Somma; USAID's Office of Overseas Management Support (M/OMS) - contact Steve Callahan; Office of Rightsizing the United States Government Overseas Presence (M/R) - contact Patrick Truhn.

15. Minimize considered.

RICE

## **ICASS Time Series Analysis by Post and Cost Centers**

### **Introduction**

The ICASS Executive Board requested the development of metrics that captured FTE and Workload, and their associated costs, for cost centers, by post, over time. The reports provided here contain that data.

The intent is to provide data to ICASS service providers and customers at a detailed level, regarding the number of staff, the amount of workload, and the costs for ICASS services at each post. The data is presented to allow comparisons between posts and at a single post over time.

### **Caveats**

Whenever data is presented, there is the danger that it will be misinterpreted, cited out of context, or used to draw conclusions utterly unsupported by the nature of the data itself. Some of the caveats presented in conjunction with the Resource Unit Cost data displayed elsewhere on the ICASS web site are applicable here. Most statistical information is useful primarily because it raises questions. Why does this data change over time like that? Why is my post's data in this cost center different from other posts in my region? Sometimes the answers provide information useful to managers, sometimes not. What is almost certainly true is that the data in and of itself does not provide a sound basis for drawing conclusions, absent the further exploration of the issues and questions it raises. Often, data that may at first glance seem to indicate a problem situation (over-staffing, high cost, etc.) do not actually reveal problems once one understands the particular context of the post and cost center in question.

When viewing this data, it is important to remember all of this. The other reality is that the farther one is removed from in-depth knowledge of the cost center and post in question, the less useful the data becomes. It is also important to remember that the data displayed is intended first and foremost to serve a cost distribution purpose, and this purpose has not changed. This should also be factored into any considerations of the data, let alone any conclusions one may be tempted to draw from it.

With all of that, it is still the intent of the ICASS Executive Board that the ICASS Global Database should be culled for data of this type, and that it should be made available widely.

### **The Reports**

The reports contain tables of data, all derived from the ICASS Global Database, that include the following data elements:

**Total FTE:** derived from time allocation worksheets for both DH American and LES as assigned to each cost center.

**Total Workload:** workload attributed to each cost center.

**Workload per FTE:** Total Workload divided by Total FTE.

**Total Cost Center Amount:** Total costs budgeted to each cost center.

Object Costs includes three categories:

**Personnel Costs:** Costs budgeted to object classes 11, 12, and 13 from cost center budgets.

**Operations Costs:** All non-personnel object classes except object class 31 budgeted to cost centers.

**Investment Costs:** Object class 31 costs budgeted to cost centers.

NB: Note that while personnel cost categories are defined in a straight-forward way, using Office of Management Budget criteria, the next two categories, and their titles, represent discretionary judgments about how to display the data. Others could have been chosen.

The next 6 columns are derived from calculations of Personnel, Operations, and Investment costs divided by Total FTE and by Total Workload, respectively.

The reports indicate the name of each cost center, and the Workload Factor for each cost center. The data is displayed by fiscal year for FY 2000 through FY 2005, and an indication is included as to whether the data is from the Lite or Standard version of the software. This designation is displayed once unless the version used changes, and then the new version is indicated in the first year the change is reflected in the data.

Please contact the ICASS Service Center at [ICASSServiceCenter@state.gov](mailto:ICASSServiceCenter@state.gov) with questions, comments, and suggestions about these reports or related issues.

# ICASS Time Series Analysis by Post and Cost Centers

Region: AF  
Post: ABIDJAN

Fiscal Year	Total		Workload	Per FTE	Amount	Object Costs			Personnel			Operations			Investment			Personnel			Operations			Investment								
	FTE	Workload				Costs	Operations	Costs	Per FTE	Costs	Per FTE	Costs	Per FTE	Costs	Per FTE	Costs	Per FTE	Costs	Per FTE	Costs	Per FTE	Costs	Per FTE	Costs	Per FTE	Costs	Per FTE	Costs	Per FTE	Costs		
<b>General Services</b>																																
<b>6132 Vehicle Maintenance - (Number of Vehicles Maintained)</b>																																
FY2000	Standard	12.25	47.00	3.84	123,346	108,026	15,320	0	8,818.44	1,250.58	0.01	2,298.42	325.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
FY2001		6.30	52.00	8.25	103,621	79,830	23,636	155	12,671.48	3,751.77	24.60	1,535.20	454.54	2.98	2.98	2.98	2.98	2.98	2.98	2.98	2.98	2.98	2.98	2.98	2.98	2.98	2.98	2.98	2.98	2.98		
FY2002		6.25	49.00	7.84	105,302	67,159	34,943	3,200	10,745.40	5,590.80	512.04	1,370.59	713.11	65.31	65.31	65.31	65.31	65.31	65.31	65.31	65.31	65.31	65.31	65.31	65.31	65.31	65.31	65.31	65.31	65.31	65.31	
FY2003		5.25	50.00	9.52	111,224	81,481	29,743	0	15,520.23	5,665.29	0.05	1,628.62	594.86	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	
FY2004		5.37	50.00	9.31	167,209	116,880	50,330	0	21,765.27	9,372.40	0.00	2,337.59	1,006.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
FY2005		6.37	56.00	8.79	213,846	177,513	36,333	0	27,867.02	5,703.77	0.00	3,169.87	648.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>6133 Administrative Supply Services - (Dollar Value of Supplies Issued)</b>																																
FY2000	Standard	13.33	155,513.00	11,666.39	241,281	176,997	64,164	120	13,278.09	4,813.51	9.02	1.14	0.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
FY2001		8.30	117,802.08	14,193.02	190,636	133,143	28,152	29,341	16,041.28	3,391.84	3,535.10	1.13	0.24	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25
FY2002		10.20	130,887.31	12,833.07	185,994	117,637	75,157	3,200	11,532.99	7,368.31	313.75	0.90	0.57	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02
FY2003		9.20	98,387.46	10,695.38	194,666	132,139	62,527	0	14,362.98	6,796.40	0.02	1.34	0.64	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FY2004		9.19	96,575.26	10,508.73	262,666	182,525	80,141	0	19,861.22	8,720.47	0.00	1.89	0.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FY2005		7.67	100,615.72	13,118.09	344,316	289,410	74,906	0	35,125.16	9,766.17	0.00	2.68	0.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>6134 Procurement Services - (Number of Executed Procurement Documents)</b>																																
FY2000	Standard	10.36	2,902.00	280.12	238,251	186,798	51,273	180	18,030.72	4,949.13	17.39	64.37	17.67	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06
FY2001		11.42	2,231.00	195.36	270,443	230,768	39,675	0	20,207.33	3,474.19	0.00	103.44	17.78	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FY2002		12.60	2,670.00	211.90	303,377	258,679	44,798	0	20,522.18	3,555.37	0.00	96.85	16.78	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FY2003		13.40	4,958.00	370.00	432,006	370,720	61,286	0	27,665.69	4,573.55	0.00	74.77	12.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FY2004		11.85	1,795.00	151.48	331,870	282,411	49,458	0	23,832.19	4,173.69	0.00	157.33	27.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FY2005		11.10	926.00	83.42	395,778	376,203	19,575	0	33,892.20	1,763.51	0.00	406.27	21.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00