

Quarterly Metrics Report

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| Metric | Description | Target | Threshold | Frequency Collection/ Reporting | Prior Results & Status | Ist Quarter Results | Status |
|--|--|--------|-----------|---------------------------------------|------------------------------|---------------------------|--------|
| Strategic Goal A: Improve participant retirement outcome | | | | | | | |
| FERS Participation Rate | Percentage of FERS participants that contribute to the TSP | 90.00% | 85.00% | Monthly/ Quarterly | 95.75% ● | 95.55% | ● |
| I Year FERS Post-separation Retention | Percentage of participants that retain a balance with TSP one year after separation | 64.00% | 60.00% | Monthly/ Quarterly | 67.51% ● | 69.14% | ● |
| FERS Full Matching Contribution Rate (Monthly) | Percentage of FERS participants deferring 5% or greater | 80.00% | 70.00% | Monthly/ Quarterly | 88.30% ● | 88.43% | ● |
| BRS Full Matching Contribution Rate (Monthly) | Percentage of active duty BRS participants deferring 5% or greater | 80.00% | 70.00% | Monthly/ Quarterly | 90.29% ● | 90.58% | ● |
| BRS Participation Rate | Percentage of active duty BRS participants who contribute to the TSP | 90.00% | 85.00% | Quarterly/ Quarterly | 94.60% ● | 93.89% | ● |
| Strategic Goal B: Provide top tier defined contribution services to participants | | | | | | | |
| Participant Satisfaction - Interactions | Percentage of participants who report satisfaction with interactions across all channels | 90.00% | 90.00% | Monthly/ Quarterly | 94.41% ● | 94.39% | ● |
| Strategic Goal C: Function as a high-performing agency | | | | | | | |
| Schedule Compliance | Percentage of daily feeds from the Recordkeeper that are processed on time and without errors to meet the FRTIB OCFO Accounting schedule for Pre Notes | 100% | 100% | Monthly/ Quarterly | 100% ● | 100% | ● |
| F, C, S, I Funds Investment | Number of days that daily investments for the F, C, S, I funds are not performed by 2 PM, Eastern Time | 0 days | 1 day | Monthly/ Quarterly | 0 ● | 0 | ● |
| G Fund Investment | Number of days that daily G Fund investment is not performed by 3 PM, Eastern Time | 0 days | 1 day | Monthly/ Quarterly | 0 ● | 0 | ● |
| Legend | | | | | | | |
| <small>N/A: Not Applicable -- : Data with a zero denominator Metric Reported Annually, Status shows current year result.</small> | | | | | | | |