

Federal Retirement Thrift Investment Board



Strategic Performance Metrics

1st Quarter Fiscal Year 2014

Metric	Description	Target	Threshold	Frequency	1stQ FY13	2ndQ FY13	3rdQ FY13	4thQ FY13	1stQFY14/ Comments	Status
Strategic Goal 1: We help people retire with dignity.										
FERS Participation Rate	Average FERS participation rate	90.00%	85.00%	Quarterly	86.60%	87.10%	86.70%	86.40%	85.90%	
FERS Average Deferral Rate	Percent of FERS participants deferring less than 5%	Annual decrease by 1% or more from prior year	Annual decrease ≥ 0%	Annually					22.08% (for 2012) A decrease of 2.66% from prior year	
1 Year Post-separation Retention	Percentage of participants that retain a balance with TSP one year after separation (\$10K+)	Annual increase of 1% or more over prior year	Annual increase ≥ 0%	Annually					29.60% A decrease of 1.5% from prior year	
Active Duty Uniformed Service member participation rate	Percentage of active duty participants in the Plan relative to the eligible active duty population	Quarterly increase in active duty participation rate greater than 0.5%	Quarterly increase ≥ 0%	Quarterly	40.20%	40.40%	40.40%	39.90%	39.50%	
Average Asset Allocation	Participants elect asset allocations that reflect greater age-based diversification	Quarterly increase greater than 0.5% in proportion of participant balances allocated to the L Funds	Quarterly increase ≥ 0%	Quarterly		14.40%	14.90%	15.20%	15.80%	

Strategic Goal 2: We ensure that FRTIB is a great place to work.										
Performance Management Plans (PmP)	Percent (%) of FRTIB staff members in place on 10/1 that have completed PMPs	100% by 10/31	100% by 12/31	Annually					100% (by 12/31)	
Best Places to Work Rankings	Ranking based on overall score which measures performance of agencies related to employee satisfaction and commitment	Top 25%	Top 50%	Annually					5/29 (for 2013)	

Strategic Goal 3: We pursue flawless operations.										
Daily Investment	Number of days that daily investments is not performed by 3 PM, Eastern Time	0 days	1 day	Quarterly	0	1	0	0	0	
Participant Account Information Availability	Number of days participant account information is not updated on the web by 8 AM, Eastern Time	0 days	1 day	Quarterly					1	
Call Center Availability	Percent (%) of time a call center is available during established business hours	99.80%	99.50%	Quarterly	99.00%	98.90%	100%	100%	100%	
Call Center Response Time	Percent (%) of calls answered within 20 seconds	90.00%	85.00%	Quarterly	92.60%	81.40%	97.80%	98.70%	97.90%	
Withdrawal Transactions	Percent (%) of withdrawals processed within five (5) business days of receipt of valid package	95.00%	90.00%	Quarterly	76.00%	98.00%	99.10%	100%	99.00%	
Participant Correspondence Response Rate	Percent (%) of written participant correspondence responded to within five (5) business days (except loans)	90.00%	85.00%	Quarterly					99.00% (12,620 of 12,747)	
Emessaging Response Rate	Percent of Emessages responded to within 24 hours (2 business days)	95.00%	90.00%	Quarterly					99.40% (13,811 13,894)	

Legend:
DNR = Did Not Receive Information
NPR = No Previous Data Reported
NA = Not applicable

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Strategic Goal 4: We maintain excellent relationships with entities that oversee, regulate, govern, and influence the TSP.										
Audit Reports	FRTIB management responds to draft and final reports within the agreed to time standards	100% within 30 days	100% within 45 days	Quarterly				100% (3 of 3 met)	100% (2 of 2 met)	
Board Satisfaction	Board's satisfaction with the information and interaction with FRTIB	Exceeds Expectations	Meet Expectations	Annually					Exceeds Expectations	
Participant Satisfaction	Participant satisfaction with the TSP	85.00%	80.00%	Biannually					87.00% (2013) A 1% Increase over 2011	
Financial Audit Opinion	Opinion on FRTIB financial statements from independent auditor	Unqualified	Unqualified	Annually					Financial Audit for 2012 (received in 4/2013) was unqualified	
ETAC Satisfaction	Strong relationship with ETAC and they actively support our positions	2/3 support on 100% of FRTIB positions	2/3 support on 90% of FRTIB positions	Annually					100%	
Performance Audit	New and existing fundamental or significant findings scheduled to be closed this quarter are closed	100%	90.00%	Quarterly			100% (7 of 7 findings)	88.00% (22 of 25 findings)	50.00% (3 of 6)	

Strategic Initiatives										
Decision Intelligence	Completion of projects within the Decision Intelligence Portfolio	Schedule slack is \geq 5% of schedule	Schedule slack is $<$ 5% of schedule	Quarterly					30.38% (Benchmarking is the only project in the execution phase)	
Enterprise Information Security & Risk Management (EISRM)	System authorizations completed according to schedule	Total assessments and authorizations planned for quarter completed	Total assessments and authorizations planned for quarter completed - 1	Quarterly				1/1	0/0	
Integrated Acquisition Strategy Index	Establishment and enhancement of contracting and acquisition policies	First draft of contracting and acquisition policies delivered by 12/31/2013	First draft of contracting and acquisition policies delivered by 3/31/2014	Annually					Both draft policies were received by 12/31/2013	

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