

***Federal***

***Personal Property Management***

***Balanced ScoreCard***

***FY 2006***

## ***Federal Personal Property Management Program Mission, Vision, and Strategy***

The Department's federal personal property management program consists of the following elements:

1. The acquisition, control, utilization, and disposition of personal property in the possession and control of DOE direct operations.
2. The oversight of DOE organizations or contractors that are responsible for the management of DOE direct operations personal property.
3. The oversight of DOE prime and offsite contractors that are responsible for the management of DOE personal property accountable to their contracts.

In implementing the program, entities<sup>1</sup> charged with DOE federal personal property management program responsibilities should be guided by the Department's stated highest level purpose (mission), desired end-state (vision), and methodology (strategy) for achieving that end-state. In turn, these entities should be guided by and support the stated mission, vision, and strategy statements in the implementation of Departmental balanced scorecard objectives, measures, and targets.

**MISSION:** To manage the DOE federal personal property management program so as to support the accomplishment of the Department's programmatic goals and objectives.

**VISION:** To manage the DOE federal personal property management program in the most efficient manner that meets customer expectations.

**STRATEGY:** To utilize innovative, customer driven, and results oriented methods and mechanisms to provide (1) the highest levels of stewardship for personal property in the possession and control of DOE direct operations, and (2) effective implementation of the

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<sup>1</sup> It is recognized that certain aspects of the DOE federal personal property management program are not performed by a DOE personal property management function at a number of DOE sites. Where that is the case, applicable Departmental BSC objectives, measures, and targets will be flowed down and applied to measure the performance of the entities (i.e., other DOE offices or contractors) charged with those program responsibilities.

oversight requirements of the DOE federal personal property management program.

## **DOE Federal Personal Property Management Program Balanced Scorecard (BSC)**

The DOE federal personal property management program BSC (hereafter referred to as the federal personal property BSC) is a functional component of the Departmental business systems performance measurement and management program issued by the DOE Procurement Executive on October 1, 1997.

In order to achieve Department-wide consistency, this review and assessment program is based on the personal property management policies, standards, and practices outlined in Department of Energy Property Management Regulations (DOE-PMR) as codified in 41 CFR Chapter 109. DOE direct operations are expected to achieve cost effective performance results while meeting Departmental expectations, customer requirements, legislative and regulatory requirements, and good business management practices.

The core performance objectives and measures established under the federal personal property BSC are applicable to all entities having DOE federal personal property management program responsibilities. The core performance measures are exclusive of additional optional measures that the Department expects its field offices to develop and implement. DOE field offices are responsible for determining the best optional measures to use for their specific situations.

In the federal personal property BSC, performance measures are developed, targets are established, and measurements taken. Formal, documented self-assessments are the principal data generating or gathering sources. Measurements are taken to report the status of performance to management and customers, and the feedback cycle drives corrective or improvement actions as appropriate.

The core objectives and measures listed in this BSC will be used by entities having DOE federal personal property management program responsibilities to monitor and manage the program. The initial step in each area will be to establish a baseline against which future performance will be compared. The objective is to demonstrate continuous improvement trends affecting program performance. To ensure this data is trendable and reliable, the methods used to establish the baseline should also be applied in subsequent assessments. It is recognized that the results may not be directly comparable from one entity to another.

## **The BSC Perspectives**

### **Customer Perspective:**

The Customer Perspective enables organizations to align the core measure (customer satisfaction) to targeted customers. For this perspective, the primary objectives are to provide effective service to and establish effective partnerships with external and internal customers. Effective service and partnerships are key ingredients in assessing the health of any federal personal property management program.

### **Internal Business Processes Perspective:**

The objectives in the Internal Business Processes Perspective collectively assure that an effective federal personal property management program is established to (1) support customer needs; (2) provide efficient life cycle management (accountability, utilization and disposition) of direct operations personal property; and (3) maintain oversight of entities that have federal personal property management program responsibilities. Key processes in the federal personal property management program must be monitored to ensure that the outcomes satisfy program objectives.

This perspective is important because it not only addresses the internal business processes that must be developed and maintained to meet customer and stakeholder requirements and expectations, but also the process results that lead to financial success and satisfied customers. Within any personal property management organization, there are a number of internal business processes that require focused management attention to ensure requirements and expectations are met as effectively as possible, while accommodating cost efficiency issues addressed in the Financial Perspective.

### **Learning and Growth Perspective:**

The two objectives under the Learning and Growth Perspective promote organizational and individual growth that will provide long-term benefits to the federal personal property management program. These objectives must be achieved if program performance is going to improve over time. While the objectives in the other perspectives identify where the program must excel to achieve breakthrough performance, the Learning and Growth objectives provide the infrastructure needed to enable the objectives in the other perspectives to be achieved. The Learning and Growth objectives are the drivers for achieving excellence in the other perspectives.

This perspective is important because it promotes individual and organizational growth factors that are crucial to future success. Support for this perspective equates to recognition of the link between top-level strategic objectives and activities needed to re-skill and motivate employees; supplying information; and aligning individuals, teams, and organizational units with the Department's strategy and long-term objectives. An analysis of the cause and effect relationships of the measures in this perspective clearly shows that employee satisfaction, employee alignment, and information availability are vital contributors to meeting the objectives stated in the other perspectives.

### **Financial Perspective:**

The objective of the Financial Perspective is to strive for optimum efficiency in the federal personal property management program. To achieve that, processes need to be analyzed to determine (1) cost and performance trends over time and (2) process changes that can be implemented to produce optimum efficiencies. Success for entities charged with federal personal property management program responsibilities should be measured by how effectively and efficiently these entities meet the needs of their constituencies.

This perspective is important because optimizing the cost efficiency of the federal personal property management program ensures that the maximum amount of funds are available for accomplishing the primary missions of the Department and its field organizations. Managers must ensure that federal personal property management program operating costs are optimized in order to meet the challenge of creating business programs that work better and cost less.

## **BSC Objectives, Measures and Targets**

### **General:**

Each federal personal Property BSC should contain both national and local performance objectives, measures, and targets. The national elements of the BSC are developed by the Department in support of the Departmental mission, vision, and strategy. The local elements of the BSC are developed locally, based on site-specific missions and needs.

### **National (Core) Measures:**

The core measures contained in the federal personal property BSC are measures that the Department expects all entities charged with federal personal property management program responsibilities to implement where applicable. The formulae and measuring methods should be maintained as standard as practicable from self-assessment to self-assessment. Some core measures may contain core and optional elements. Core elements are aspects of the federal personal property management program that the Department expects all entities to take into consideration, where applicable, when measuring. Optional elements are aspects of the federal personal property management program that the Department suggests, but does not require, for measurement where applicable.

### **Local Measures:**

The federal personal property BSC should also include local measures to track performance in areas of importance to the local site. The following measures are provided as examples of local measures that are currently in use throughout the DOE complex:

#### ***1. Customer Perspective***

- ! Percent accuracy of key property data elements (e.g., property control number, nomenclature, part/model number, and serial number) where customers maintain or update databases.

#### ***2. Internal Business Processes Perspective***

- ! Number of property system processes re-engineered during period.
- ! Percent and/or value (acquisition cost) of personal property items lost, damaged, destroyed, and/or stolen during the period.

- ! Value (acquisition cost) of personal property items found during the period.
- ! Percent of scheduled property management reviews conducted during period.
- ! Percent of scheduled management walk-throughs completed during period.
- ! Percent of excess or surplus property shipped within XX days of receipt of requisitions or transfer orders.
- ! Percent of usable property with sale value sold within XX days after completion of required screening.
- ! Extent to which reliable property, administrative, and financial systems are in place and integrated.
- ! Percent of Government equipment issues resolved in a timely (defined locally) fashion.

### **3. *Learning and Growth***

- ! Number of classes/training sessions, supporting BSC objectives, provided to personal property custodians/representatives during the period.
- ! Percent of personal property custodians/representatives who attended the classes that were provided during the period in support of BSC objectives.
- ! Percent of personal property custodians/representatives who have been trained regarding their property management responsibilities.
- ! Percent of professional personal property employees who have attended a basic property administration course.
- ! Percent of professional personal property employees who have attended property management related training (e.g., demilitarization, high risk, NPMA).
- ! Number of employee suggestions, supporting BSC objectives that were adopted during the period.
- Percent of personal property professional staff with professional certifications related to BSC objectives.



#### **4. Financial Perspective**

- ! Net proceeds from the sale of surplus assets as a percent of asset acquisition cost.
- ! Dollar value of site-generated excess property reutilized internally at the site.
- ! Dollar value of externally generated excess property (i.e., by other DOE sites and other Federal agencies) utilized by the site.
- ! Reutilization screening transactions (number and dollar value) completed during period

#### **National and Local Targets:**

Each entity should strive to meet or exceed the national targets contained in the BSC. If an entity's current performance results fall short the national targets, short-term local targets may be established to stimulate progress towards the national targets over time. When acceptable levels of performance are achieved, they should be maintained. However, performance should not be driven beyond what is necessary to support the organizational mission.

#### **Implementing Guidance:**

The following information is provided as a suggested methodology for gathering data and evaluating results for each of the core measures listed in the direct operations BSC. Alternate implementing methodologies may be referred to Headquarters for inclusion in revisions to the BSC.

## CUSTOMER PERSPECTIVE

(OBJECTIVE #1, CORE MEASURE #1)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #1: Provide effective service to and establish effective partnerships with external customers.</p> <p>Data Source: Written customer surveys (periodic or point of service), focus groups, interviews, etc.</p>	<p>Core Measure #1: The extent to which external customers are satisfied with specific personal property products and services.</p> <p>Core Elements: The process should provide feedback from external customers regarding their satisfaction with</p> <ol style="list-style-type: none"> <li>(1) Timeliness of personal property products and services they received,</li> <li>(2) the quality of the information and services provided by personal property functions, and</li> <li>(3) the degree of partnership that exists between personal property functions and external customers in terms of responsiveness, cooperation and level of communication.</li> </ol>	<p>National Target: 80% (or equivalent index value) customer satisfaction rating.</p> <p>Local Target: (1) A short term lower local target may be established if the most recent rating is below the national target (or equivalent index value); or (2) If there is no customer survey history, conduct a customer survey and establish a baseline rating. If the baseline rating is below the national target, a short-term lower target may be established.</p>

## CUSTOMER PERSPECTIVE

<b>Objective #1:</b>	Provide effective service to and establish effective partnerships with external and internal customers.
<b>Core Measure #1:</b>	The extent to which external customers are satisfied with specific personal property products and services. <sup>2</sup>
<b>Core Elements:</b>	The process should provide feedback from external customers regarding their satisfaction with (1) the <b>timeliness</b> of personal property products and services they received, (2) the <b>quality</b> of the information and services provided by personal property functions, and (3) the degree of <b>partnership</b> that exists between direct operations personal property function(s) and external customers in terms of responsiveness, cooperation and level of communication.
<b>National Target:</b>	80% (or equivalent index value) customer satisfaction rating.
<b>Local Target:</b>	<ol style="list-style-type: none"><li>1. A short term lower local target may be established if the most recent rating is below the national target (or equivalent index value).</li><li>2. If there is no customer survey history, conduct a customer survey and establish a baseline rating. If the baseline rating is below the national target, a short-term lower local target may be established.</li></ol>
<b>Suggested Data Sources:</b>	Written customer surveys (periodic or point of service), focus groups, interviews, etc.
<b>Suggested Measuring Method:</b>	(1) Identify the external customers who were provided specific products and services during the period (e.g.,

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<sup>2</sup> Products and services may include preparation and/or validation of reports (e.g., motor vehicle reports, disposal reports) required by Headquarters; responses to DOE Headquarters requests for information; correspondence with externally established suspense dates; self assessment plans negotiated with other DOE offices and contractors; and surveillance, validation, and verification activity.

## CUSTOMER PERSPECTIVE (continued)

quarter, semi-annual, annual). Select a statistically valid random sample from the total external customer population. Conduct a customer satisfaction survey with the selected customers. Determine the external customer satisfaction rating or equivalent index for the period.

or

(2) Provide a point of service customer survey form with each product or service provided during the period (e.g., quarter, semi-annual, annual). Review each survey form upon return by the customer and address specific issues/concerns raised by the customer. At the end of the period, analyze the survey results or, if volume of surveys is sufficiently large, select a statistically valid random sample from the total population of survey forms. Determine the customer satisfaction rating or equivalent index for the period.

### **Results:**

Compare the external customer satisfaction rating or index with the target. As necessary, determine the course of action needed to bring about improvement, to include addressing and providing candid feedback on individual external customer concerns and issues raised during the customer survey process. Consider tracking the course of action under one of the BSC perspectives, as appropriate.



## CUSTOMER PERSPECTIVE

(OBJECTIVE #1, CORE MEASURE #2)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #1: Provide effective service to and establish effective partnerships with internal customers.</p> <p>Data Source: Written customer surveys (periodic or point of service), focus groups, interviews, etc.</p>	<p>Core Measure #2: The extent to which internal customers are satisfied with specific personal property products and services.</p> <p>Core Elements:</p> <p>The measure should provide feedback from external customers regarding their satisfaction with</p> <ol style="list-style-type: none"> <li>(1) the timeliness of personal property products and services they received,</li> <li>(2) the quality of the information and services provided by personal property functions, and</li> <li>(3) the degree of partnership that exists between personal property functions and external customers in terms of responsiveness, cooperation and level of communication.</li> </ol>	<p>National Target: 80% (or equivalent index value) customer satisfaction rating.</p> <p>Local Target:</p> <ol style="list-style-type: none"> <li>(1) A short term lower local target may be established if the most recent rating is below the national target (or equivalent index value);</li> </ol> <p style="text-align: center;">or</p> <ol style="list-style-type: none"> <li>(2) If there is no customer survey history, conduct a customer survey and establish a baseline rating. If the baseline rating is below the national target, a short-term lower target may be established.</li> </ol>

## CUSTOMER PERSPECTIVE

<b>Objective #1:</b>	Provide effective services to and establish effective partnerships with internal customers.
<b>Core Measure #2:</b>	The extent to which internal customers are satisfied with specific personal property products and services. <sup>3</sup>
<b>Core Elements:</b>	The measure should provide feedback from internal customers regarding their satisfaction with (1) the timeliness of personal property products and services they received, (2) the quality of the information and services provided by personal property functions, and (3) the degree of partnership that exists between the direct operations personal property function(s) and internal customers in terms of responsiveness, cooperation and level of communication.
<b>National Target:</b>	80% (or equivalent index value) customer satisfaction rating.
<b>Local Target:</b>	<ol style="list-style-type: none"><li>1. A short term lower local target may be established if the most recent rating is below the national target (or equivalent index value).</li><li>2. If there is no customer survey history, conduct a customer survey and establish a baseline rating. If the baseline rating is below the national target, a short term lower local target may be established.</li></ol>
<b>Data Sources:</b>	Written customer surveys (periodic or point of service), focus groups, interviews, etc.
<b>Suggested Measuring Method:</b>	(1) Identify the internal customers who were provided specific products and services during the period (e.g., quarter, semi-annual, annual). Select a statistically valid random sample from the total internal customer

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<sup>3</sup> Products and services may include direct operations property management program enhancements, internal control reviews, self assessment plans negotiated with DOE offices and contractors responsible for direct operations personal property.

## **CUSTOMER PERSPECTIVE (continued)**

population. Conduct a customer satisfaction survey with the selected customers. Determine the internal customer satisfaction rating or equivalent index for the period.

or

(2) Provide a point of service customer survey form with each product or service provided during the period (e.g., quarter, semi-annual, annual). Review each survey form upon return by the customer and address specific issues/concerns raised by the customer. At the end of the period, analyze the results or, if the volume is sufficiently large, select a statistically valid random sample from the total population of survey forms and analyze the results. Determine the internal customer satisfaction rating or index for the period.

### **Results:**

Compare the internal customer satisfaction rating or index with the target. As necessary, determine the course of action needed to bring about improvement, to include addressing and providing candid feedback on individual internal customer concerns and issues raised during the survey process. Consider tracking the course of action under one of the BSC perspectives, as appropriate.





## INTERNAL BUSINESS PROCESSES PERSPECTIVE

(Objective #1, Core Measure #1)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #1: Establish and maintain an effective program for the acquisition, utilization, control and disposition of direct operations personal property.</p> <p>Data Source: Internal control processes, implementation plan, and review documentation and findings.</p>	<p>Core Measure #1: Extent that internal control processes have been developed and implemented.</p>	<p>National Target: Completion of scheduled annual internal control reviews.</p> <p>Local Target: Completion of scheduled annual internal control reviews.</p>



## INTERNAL BUSINESS PROCESSES PERSPECTIVE

<b>Objective #1:</b>	Establish and maintain an effective program for the acquisition, utilization, control, and disposition of direct operations personal property.
<b>Core Measure #1:</b>	The extent that internal control processes have been developed and implemented.
<b>National Target:</b>	Completion of scheduled annual internal control reviews.
<b>Local Target:</b>	Same as above.
<b>Suggested Data Source:</b>	Internal control processes, implementation plan, and review documentation and findings
<b>Suggested Measuring Method:</b>	Compare (1) the number of internal control process reviews that were scheduled for the period with (2) the number of internal control process reviews that were completed during the period. Determine if the target was met.
<b>Results:</b>	Complete the internal control process reviews scheduled for the period. Review the results of the internal control process reviews. As necessary, determine the course of action needed to bring about improvements in the property management processes. Consider tracking the course of action under one of the BSC perspectives, as appropriate.



## INTERNAL BUSINESS PROCESSES PERSPECTIVE

(Objective #1, Core Measure #2)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #1: Establish and maintain an effective program for the acquisition, utilization, control and disposition of direct operations personal property.</p> <p>Data Source: Personal property database, physical inventory results, and supporting documentation.</p>	<p>Core Measure #2: The percent of property subject to physical inventory located during inventory, computed as follows:</p> <p style="text-align: center;">% Located = <math>\frac{\text{amount located during physical inventory}}{\text{amount subject to physical inventory}}</math></p> <p>Core Elements: The measure should provide feedback on the amount of property (by line item and acquisition cost) located during physical inventory for each of the following categories of property: equipment and sensitive property. Feedback should be provided on stores inventory for those direct operations sites that have this type of property.</p>	<p>National Target:</p> <p>Equipment: 99% (acq. cost) 98% (items)</p> <p>Sensitive items: 99% (acq. cost) 98% (items)</p> <p>Stores inventory: 99% (acq. cost) 98% (items)</p> <p>Local Target: A short-term lower target may be established if the most recent physical inventory results are below the national target.</p>

## INTERNAL BUSINESS PROCESSES PERSPECTIVE

<b>Objective #1:</b>	Establish and maintain an effective program for the acquisition, utilization, control, and disposition of direct operations personal property.
<b>Core Measure #2:</b>	The percent of property subject to physical inventory located during physical inventory, computed as follows:  $\% \text{ Located} = \frac{\text{Amount Located During Physical Inventory}}{\text{Amount Subject to Physical Inventory}}$
<b>Core Elements:</b>	The measure should provide feedback on the amount of property (by line item and acquisition cost) located during physical inventory for each of the following categories of property: equipment and sensitive property. Feedback should be provided on stores inventory for those direct operations sites that have this type of property
<b>National Target<sup>4</sup>:</b>	Equipment - 99% (acquisition cost) and 98% (items) Sensitive items - 99% (acquisition cost) and 98% (items) Stores inventory - 99% (acquisition cost) and 98% (items)
<b>Local Target:</b>	A short-term lower local target may be established if the most recent physical inventory results are below the national target.
<b>Suggested Data Source:</b>	Personal property database, physical inventory results, and supporting documentation.
<b>Suggested Measuring Method:</b>	Using approved physical inventory methods, complete the physical inventories that are scheduled for the period. Determine the percent of items located (by line item and acquisition cost) during each inventory. For each category of property whose physical inventory is conducted using statistical sampling techniques, calculate an estimated percent of property located for the entire category.

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<sup>4</sup> American Society for Testing and Materials Standard Number E2131-01, March 2001.

## **INTERNAL BUSINESS PROCESSES PERSPECTIVE (continued)**

**Results:** Compare the actual (or estimated) property located rates with the target rates. As necessary, determine the course of action needed to bring about improvements in the property located rates. Consider tracking the course of action under one of the BSC perspectives, as appropriate.



## INTERNAL BUSINESS PROCESSES PERSPECTIVE

(Objective #1, Core Measure #3)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #1: Establish and maintain an effective program for the acquisition, utilization, control and disposition of direct operations personal property.</p> <p>Data Source: Direct operations personal property management databases, physical inventory documentation.</p>	<p>Core Measure #3: The percent accuracy of property assignments (i.e., items confirmed by the accountable individuals or organizations as being properly assigned), computed as follows:</p> $\% \text{ Accuracy} = \frac{\text{\# of confirmed, properly assigned items}}{\text{total \# of assigned items}}$ <p>Core Elements: The measure, intended to demonstrate individual and/or organization responsibilities and the level of accuracy for personal property assignments, should provide feedback for at least the following categories of property: (1) sensitive and (2) equipment items.</p>	<p>National Target:</p> <p>98% or more of all items are properly assigned to the responsible individuals or organizations.</p> <p>Local Target: A short-term lower target may be established if the most recent property assignment accuracy rate is below the national target.</p>

## INTERNAL BUSINESS PROCESSES PERSPECTIVE

<b>Objective #1:</b>	Establish and maintain an effective program for the acquisition, utilization, control, and disposition of direct operations personal property.
<b>Core Measure #3:</b>	The percent accuracy of property assignments (i.e., items confirmed by the accountable individuals or organizations as being properly assigned), computed as follows:  $\% \text{ Accuracy} = \frac{\text{Number of Confirmed, Properly Assigned Items}}{\text{Total Number of Assigned Items}}$
<b>Core Elements:</b>	The measure, intended to demonstrate individual and/or organizational responsibility and the level of accuracy for personal property assignments, should provide feedback for at least the following categories of property: (1) sensitive items and (2) equipment items.
<b>National Target<sup>5</sup>:</b>	98% or more of all items are properly assigned to the responsible individuals or organizations.
<b>Local Target:</b>	A short term lower local target may be established if the most recent property assignment accuracy rate is below the national target.
<b>Suggested Data Sources:</b>	Direct operations personal property management databases, physical inventory documentation.
<b>Suggested Measuring Method:</b>	Determine the population size for each category of property being measured. Select a statistically valid random sample from each population. Contact the accountable individuals or organizations of record. Determine if the assignments of record are accurate. Establish a population accuracy rate based on the statistical sampling results.

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<sup>5</sup> American Society for Testing and Materials Standard Number E2131-01, March 2001.

**Results:**

Compare the population accuracy rates established from the random sampling with the target. As necessary, the course of course of action needed to bring about improvements in the accuracy rates. Consider tracking the course of action under one of the BSC perspectives, as appropriate.

## INTERNAL BUSINESS PROCESSES PERSPECTIVE

(Objective #1, Core Measure #4)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #1: Establish and maintain an effective program for the acquisition, utilization, control and disposition of direct operations personal property.</p> <p>Data Source: Equipment utilization/issue records.</p>	<p>Core Measure #4: The percent of equipment items meeting Federal or local utilization/issue standards or objectives, computed as follows:</p> $\% = \frac{\text{\# of equipment items meeting standards}}{\text{total \# of equipment items subject to standards}}$ <p>Core Elements: The measure is intended to demonstrate the degree of effective utilization of motor vehicles and, where appropriate, other equipment items.</p>	<p>National Target: 90% (or better) of equipment items meet Federal or local utilization/issue standards.</p> <p>Local Target: A short-term lower local target may be established if the most recent percentage of equipment items meeting the standards is below the national target.</p>

## INTERNAL BUSINESS PERSPECTIVE

<b>Objective #1:</b>	Establish and maintain an effective program for the acquisition, utilization, control, and disposition of direct operations personal property.
<b>Core Measure #4:</b>	The percent of equipment items meeting Federal or local utilization/issue standards or objectives, computed as follows:  $\% = \frac{\text{Number of Equipment Items Meeting Standards}}{\text{Total Number of Equipment Items Subject to Standards}}$
<b>Core Elements:</b>	The measure is intended to demonstrate the degree of effective utilization of motor vehicles and, where appropriate, other equipment items.
<b>National Target:</b>	90% (or better) of equipment items meet Federal or local utilization/issue standards.
<b>Local Target:</b>	A short-term lower local target may be established if the most recent percentage of equipment items meeting the standards is below the national target.
<b>Suggested Data Source:</b>	Equipment utilization/issue records.
<b>Suggested Measuring Method:</b>	From each equipment item that is subject to standards or objectives, determine its actual usage/issue rate for the period. Compare the actual usage/issue rate with the established usage/issue standard. Determine the percentage of items that meet the standards.
<b>Results:</b>	As necessary, determine the course of action needed to bring about improved usage/issue rates for the equipment items falling below the standards. Consider tracking the course of action under one of the BSC perspectives, as appropriate.



## **INTERNAL BUSINESS PROCESSES PERSPECTIVE**

(Objective #1, Core Measure #5)

**OBJECTIVE**

**MEASURE**

**NATIONAL TARGET**

<p>Objective #1: Establish and maintain an effective program for the acquisition, utilization, control and disposition of direct operations personal property.</p> <p>Data Source: Excess and surplus property disposal records.</p>	<p>Core Measure #5: Percent of increase in the volume of items reported excess and disposed of within 180 days as compared with previous cycle.</p> <p><math>\% = \frac{\text{previous cycle items excessed/disposed of in 180 days}}{\text{current cycle items excessed/disposed of in 180 days}}</math></p>	<p>National Target: 8% increase</p>
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**INTERNAL BUSINESS PROCESSES PERSPECTIVE**



<b>Objective #1:</b>	Establish and maintain an effective program for the acquisition, utilization, control, and disposition of direct operations personal property.
<b>Core Measure #5:</b>	Percent of increase in the volume of items reported excess and disposed of within 180 days as compared with the previous cycle.  $\% = \frac{\text{previous cycle items excessed/disposed of in 180 days}}{\text{current cycle items excessed/disposed of in 180 days}}$
<b>National Target:</b>	8% increase
<b>Suggested Data Source:</b>	Excess and surplus property disposal records.
<b>Suggested Measuring Method:</b>	Determine the population size for all disposal actions completed during the period. Select a statistically valid random sample from the population. Determine the percentage of sampled disposal actions that were complete within 180 days. Compare with previous cycle and report percentage of increase.
<b>Results:</b>	Review those sampled disposal actions that were not completed in a timely fashion and determine what caused the delays. Determine if systemic problems exists affecting timely disposition that require attention. As necessary, determine the course of action needed to improve the timely disposal percentage. Consider tracking the course of action under one of the BSC perspectives, as appropriate.

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## **INTERNAL BUSINESS PROCESSES PERSPECTIVE**

(Objective #2, Core Measure #1)

**OBJECTIVE**

**MEASURE**

**NATIONAL TARGET**

<p>Objective #2: Establish and implement an effective program for the oversight of direct operations personal property management operations.</p> <p>Data Source: Performance objectives, measures, and targets; self-assessment plans; operational awareness activities.</p>	<p>Core Measure #1: The percent of self assessment plans that have been updated, approved, and implemented, computed as follows:</p> <p><math display="block">\% = \frac{\text{\# of updated, approved, \&amp; implemented self assessment plans}}{\text{\# of entities responsible for direct ops personal property}}</math></p>	<p>National Target: 100%</p> <p>Local Target: 100%</p>
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**INTERNAL BUSINESS PROCESSES PERSPECTIVE**

**Objective #2:** Establish and implement an effective program for the

oversight of direct operations personal property management operations<sup>7</sup>.

**Core Measure #1:** The percent of self assessment plans that have been updated, approved, and implemented, computed as follows:

$$\frac{\text{Number of updated, approved, and implemented self assessment plans}}{\text{Number of entities responsible for direct ops personal property}}$$

**National Target:** 100%

**Local Target:** Same as above.

**Suggested Data Source:** Performance objectives, measures, and targets; self assessment plans; operational awareness activities

**Suggested Measuring Method:** For each entity responsible for direct operations personal property, review the content of the self assessment plan and determine if the plan is current: (1) adequately addresses functional areas to be reviewed, assessment methods to be used, time schedules, etc. and (2) has been updated (to include current performance objectives, measures and targets), approved, and implemented. Determine the percentage of entities that have a current self-assessment plan. Compare with the target.

**Results:** If the target was not met, negotiate a sufficiently detailed and current mutually agreeable self assessment plan with each entity that has direct operations personal property management responsibilities.

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<sup>7</sup> This objective and its associated measures apply when direct operations property management responsibilities are performed by other DOE offices or by contractors.

## **INTERNAL BUSINESS PROCESSES PERSPECTIVE**

(Objective #2, Core Measure #2)

**OBJECTIVE**

**MEASURE**

**NATIONAL TARGET**

<p>Objective #2: Establish and implement an effective program for the oversight of direct operations personal property management operations.</p> <p>Data Source: Operational awareness activities (on-site reviews, status reports, trend analyses, meetings, interviews, internal control reports, Inspector General reports, General Accounting Office reports, validation reviews, verification reviews).</p>	<p>Core Measure #2: The extent to which operational awareness activities (surveillance, validation, &amp; verification) are conducted, computed as follows:</p> <p><u># of operational awareness plan activities completed</u> # of operational awareness plan activities scheduled</p>	<p>National Target: Operational awareness plan is met.</p> <p>Local Target: Operational awareness plan is met.</p>
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**INTERNAL BUSINESS PROCESSES PERSPECTIVE**

**Objective #2:** Establish and implement an effective program for the

oversight of direct operations personal property management operations.<sup>8</sup>

<b>Core Measure #2:</b>	The extent to which operational awareness activities (surveillance, validation, and verification) are conducted, computed as follows:  $\frac{\text{Number of operational awareness plan activities completed}}{\text{Number of operational awareness plan activities scheduled}}$
<b>National Target:</b>	Operational awareness plan is met
<b>Local Target:</b>	Same as above.
<b>Suggested Data Source:</b>	Operational awareness activities (on-site reviews, status reports, trend analyses, meetings, interviews, internal control reports, Inspector General reports, General Accounting Office reports, validation reviews, verification reviews).
<b>Suggested Measuring Method</b>	Compare (1) the number of operational awareness activities completed with (2) the number of operational awareness activities planned for the performance period. Determine if the target was met.
<b>Results:</b>	If the target was not met, determine what steps need to be taken to ensure that operational awareness plan activities are completed as scheduled and reasonable assurance is provided.

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<sup>8</sup> This objective and its associated measures apply when direct operations property management responsibilities are performed by other DOE offices or by contractors.

## INTERNAL BUSINESS PROCESSES PERSPECTIVE

(Objective #3, Core Measure #1)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #3: Establish and implement an effective program for the oversight of prime contractor personal property management operations.</p> <p>Data Source: Performance objectives, measures, and targets; self-assessment plans; operational awareness activities.</p>	<p>Core Measure #1 The percent of self-assessment plans that have been updated, approved, and implemented, computed as follows:</p> <p><u># of updated, approved &amp; implemented prime contractor selfassessment plans</u> # of prime contractors administered by the DOE field office</p>	<p>National Target: 100%</p> <p>Local Target: 100%</p>



## INTERNAL BUSINESS PROCESSES PERSPECTIVE

**Objective #3:** Establish and implement an effective program for the oversight of prime contractor personal property management operations.

**Core Measure #1:** The percent of self assessment plans that have been updated, approved, and implemented, computed as follows:

$$\frac{\text{Number of updated, approved and implemented prime contractor self assessment plans}}{\text{Number of prime contractors administered by the DOE field office}}$$

**National Target:** 100%

**Local Target:** Same as above.

**Suggested Data Source:** Performance objectives, measures, and targets; self assessment plans; operational awareness activities

**Suggested Measuring Method:** For each prime contractor administered by the DOE field office, review the content of the self assessment plan and determine if the plan is current: (1) adequately addresses functional areas to be reviewed, assessment methods to be used, time schedules, etc. and (2) has been updated (to include current performance objectives, measures and targets), approved, and implemented. Determine the percentage of contractors that have a current self-assessment plan. Compare with the target.

**Results:** If the target was not met, negotiate a current self-assessment plan with each prime contractor that is not implementing a current self-assessment plan.

## INTERNAL BUSINESS PROCESSES PERSPECTIVE

(Objective #3, Core Measure #2)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #3: Establish and implement an effective program for the oversight of prime contractor personal property management operations.</p> <p>Data Source: Operational awareness activities (on-site reviews, status reports, trend analyses, meetings, interviews, internal control reports, Inspector General reports, General Accounting Office reports, validation reviews, verification reviews).</p>	<p>Core Measure #2: The extent to which operational awareness activities (surveillance, validation, &amp; verification) are conducted, computed as follows:</p> <p><u># of operational awareness plan activities completed</u> # of operational awareness plan activities scheduled</p>	<p>National Target: Operational awareness plan is met.</p> <p>Local Target: Operational awareness plan is met.</p>

## INTERNAL BUSINESS PROCESSES PERSPECTIVE

<b>Objective #3:</b>	Establish and implement an effective program for the oversight of prime contractor personal property management operations.
<b>Core Measure #2:</b>	The extent to which operational awareness activities (surveillance, validation, and verification) are conducted, computed as follows:  $\frac{\text{Number of operational awareness plan activities completed}}{\text{Number of operational awareness plan activities scheduled}}$
<b>National Target:</b>	Operational awareness plan is met
<b>Local Target:</b>	Same as above.
<b>Suggested Data Source:</b>	Operational awareness activities (on-site reviews, status reports, trend analyses, meetings, interviews, internal control reports, Inspector General reports, General Accounting Office reports, validation reviews, verification reviews).
<b>Suggested Measuring Method</b>	Compare (1) the number of operational awareness activities completed with (2) the number of operational awareness activities planned for the performance period. Determine if the target was met.
<b>Results:</b>	If the target was not met, determine what steps need to be taken to ensure that operational awareness plan activities are completed as scheduled and reasonable assurance is provided.

## INTERNAL BUSINESS PROCESSES PERSPECTIVE

(Objective #4, Core Measure #1)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #4: Establish and implement an effective program for the oversight of offsite contractor personal property management operations.</p> <p>Data Source: Operational awareness activities, letters of delegation, oversight activity reports.</p>	<p>Core Measure #1: The number (and percent) of DOE offsite contractors receiving personal property management oversight from the Defense Contract Management Agency (DCMA).</p>	<p>National Target: Demonstrate increasing reliance on DCMA oversight where cost effective and applicable.</p> <p>Local Target: Demonstrate increasing reliance on DCMA oversight where cost effective and applicable.</p>



## Internal Business Processes Perspective

<b>Objective #4:</b>	Establish and implement an effective program for the oversight of offsite contractor personal property management operations.
<b>Core Measure #1:</b>	The number (and percent) of DOE offsite contractors receiving personal property management oversight from the Defense Contract Management Agency (DCMA).
<b>National Target:</b>	Demonstrate increasing reliance on DCMA oversight where cost effective and applicable.
<b>Local Target:</b>	Same as above.
<b>Suggested Data Source:</b>	Operational awareness activities, letters of delegation, oversight activity reports.
<b>Suggested Measuring Method</b>	Determine the number (and percent) of offsite contractors receiving personal property management oversight from DOE that receives oversight from DCMA. Determine the extent and cost of DOE oversight, determine the cost of comparable oversight from DCMA, and compare.
<b>Results:</b>	When determined cost effective, delegate oversight to DCMA in accordance with the provisions of the May 15, 2001 Memorandum of Understanding between DOE and DCMA.

Change 1, 10/1/2001

## INTERNAL BUSINESS PROCESSES PERSPECTIVE

(Objective #5, Core Measure #1)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #5: Use of Information Technology to improve asset management performance.</p> <p>Data Source: Personal property database, surplus property sales records, and supporting documentation.</p>	<p>Core Measure #1: The percent change in current year “on-line” sales when compared with prior year “on-line” sales.</p> $\% \text{ Change} = \frac{\# \text{ of line items sold "on-line" (current yr. - prior yr.)}}{\# \text{ of line items sold "on-line" during prior year}}$	<p>National Target: Increase the number of items sold on-line” by 10% per year for two years.</p> <p>Local Target: National target or better.</p>



## INTERNAL BUSINESS PROCESSES PERSPECTIVE

**Objective #5:** Use of Information Technology to improve asset management performance.

**Core Measure #1:** The percent change in current year “on line”<sup>9</sup> sales when compared with prior year “on line” sales.

$$\% \text{ Change} = \frac{\# \text{ of Line Items Sold "On Line" (Current Year - Prior Year)}}{\# \text{ of Line Items Sold "On Line" During Prior Year}}$$

**National Target:** Increase the number of items sold “on line” by 10% per year for two years.

**Local Target:** National target or better.

**Suggested Data Source:** Personal property database, surplus property sales records, and supporting documentation.

**Suggested Measuring** If there were no prior year “on line” sales, establish **Method:** baseline u:  
Subtract prior year line items sold “on line” from current year line items sold “on line.” Divide the difference by the number of line items sold “on line” during prior year.

**Results:** Determine if the targeted percent increase in on line sales was achieved. As necessary, determine the course of action needed to bring about improved results in the use of on line sales.

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<sup>9</sup> On line sales media may include locally developed sales capabilities, sales services available from another DOE site, or sales services available from another Federal agency such as GSA.

Change, 7/25/2005

## **INTERNAL BUSINESS PROCESSES PERSPECTIVE**

(Objective #6, Core Measure #1)

**OBJECTIVE**

**MEASURE**

**NATIONAL TARGET**

<p>Objective #6: Ensure that personal property acquired via purchase card is recorded in the property and financial management systems.</p> <p>Data Source: Personal property database, receiving reports, credit card vouchers, sales receipts and supporting documentation.</p>	<p>Core Measure #1: The percent of personal property acquired via purchase card that is recorded in property and financial databases within 72 hours of receipt.</p> <p><math>\% = \frac{\text{\# of items acquired via purchase card}}{\text{\# of items recorded in property and financial database within 72 hours.}}</math></p>	<p>National Target: 98%</p> <p>Local Target: National target or better.</p>
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## INTERNAL BUSINESS PROCESSES PERSPECTIVE

- Objective #6:** Ensure that personal property acquired via purchase card is recorded in property and financial management systems.
- Core Measure #1:** The percent of personal property acquired via purchase card that is recorded in property and financial databases within 72 hours of receipt.
- % =  $\frac{\text{\# of Items acquired Via Purchase Card}}{\text{\# of Items Recorded in Property and Financial Database within 72 hours}}$
- National Target:** 98%
- Local Target:** National target or better.
- Suggested Data Source:** Personal property database, receiving reports, credit card vouchers, sales receipts and supporting documentation.
- Suggested Measuring Method:** Compare the number of items acquired via the purchase card to the number of items recorded in property and financial databases. **Method:** purchase card
- Results:** As necessary, determine the course of action needed to bring about improved accountability for items acquired with the purchase card. Consider tracking the course of action under one of the BSC perspectives, as appropriate.

## **INTERNAL BUSINESS PROCESSES PERSPECTIVE**

(Objective #7, Core Measure #1)

**OBJECTIVE**

**MEASURE**

**NATIONAL TARGET**

<p>Objective #7: Ensure that subcontractor-held personal property is recorded in the Contractor's property management system.</p> <p>Data Source: Subcontractor's personal property databases, physical inventory, receiving documents.</p>	<p>Core Measure #1: The percent of personal property identified in the subcontractor's property inventory upon review of invoices and/or scheduled inventories during reporting period.</p> <p><math>\% = \frac{\text{\# of items identified in during inventory}}{\text{\# of items received per invoices}}</math></p>	<p>National Target: 98%</p> <p>Local Target: National target or better.</p>
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## INTERNAL BUSINESS PROCESSES PERSPECTIVE

<b>Objective #7:</b>	Ensure that subcontractor-held property is recorded in the Contractor's property management system.
<b>Core Measure #1:</b>	The percent of property identified in the subcontractor's property inventory upon review of invoices and/or scheduled inventories.  $\% = \frac{\text{\# of items identified in during inventory}}{\text{\# of items receipted per invoices}}$
<b>National Target:</b>	98%
<b>Local Target:</b>	National target or better.
<b>Suggested Data Source:</b>	Subcontractor's personal property databases, physical inventory, receiving documents
<b>Suggested Measuring Method:</b>	Compare the number of items found during a review of invoices and/or scheduled inventory to the number of items recorded in the subcontractor's property database.
<b>Results:</b>	As necessary, determine the course of action needed to bring about improved accountability and control for items held by a subcontractor. Consider tracking the course of action under one of the BSC perspectives, as appropriate.

## Learning and Growth Perspective

(Objective #1 Core Measure #1)  
Reserved

OBJECTIVE	MEASURE	NATIONAL TARGET
Objective #1: Reserved	Core Measure #1: Reserved	National Target:



## **LEARNING AND GROWTH PERSPECTIVE**

(Reserved)

**Objective #1:**

**Core Measure#1:**

**Core Elements:**

**National Target:**

**Local Target:**

**Suggested Data Sources:**

**Suggested Measuring:**

**Method:**

**Results:**

## LEARNING AND GROWTH PERSPECTIVE

(Objective #2, Core Measure #1)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #2: Ensure employee alignment to BSC objectives.</p> <p>Data Source: Training schedules, individual development, and performance standards.</p>	<p>Core Measure #1: Percent of direct operations professional property management employees having performance expectations and training requirements responding to BSC objectives, computed as follows:</p> $\% = \frac{\text{\# of property employees completing BSC – supportive training}}{\text{total \# of personal property employees}}$ <p>Core Elements: The measure, intended to demonstrate the degree to which professional personal property BSC objectives, should provide feedback on success rates for: (1) completing funded training that supports BSC objectives; (2) incorporating BSC objectives in individual development plans; and (3) completing annual performance reviews against BSC related performance standards.</p>	<p>National Target: (1) 90% of funded training, supporting BSC objectives, is completed.</p> <p>and</p> <p>(2) 90% of property management employees are aligned with BSC objectives.</p> <p>Local Target: (1) National target or better. However, a short-term lower local target may be established if the personal property operation is significantly affected by personnel changes (retirements, reduction-in-force, etc.).</p>

## LEARNING AND GROWTH PERSPECTIVE

**Objective #2:** Ensure employee alignment to BSC objectives.

**Core Measure#1:** Percent of direct operations professional property management employees having performance expectations and training requirements responding to BSC objectives, computed as follows:

$$\% = \frac{\text{No. of Property Employees Completing BSC-Supportive Training}}{\text{Total Number of Personal Property Employees}}$$

$$\% = \frac{\text{No. of Personal Property Employees With BSC-Based Performance Expectations}}{\text{Total Number of Personal Property Employees}}$$

**Core Elements:** The measure, intended to demonstrate the degree to which professional personal property employees are aware of and aligned with personal property BSC objectives, should provide feedback on success rates for: (1) completing funded training that supports BSC objectives; (2) incorporating BSC objectives in individual development plans; and (3) completing annual performance reviews against BSC related performance standards.

**National Target:** (1) 90% of funded training, supporting BSC objectives, is completed.

and

(2) 90% of property management employees are aligned with BSC objectives.

**Local Target:** (1) National target or better. However, a short term lower local target may be established if the personal property operation is significantly affected by personnel changes (retirements, reductions-in-force, etc.)

**Suggested Data Sources:** Training schedules, individual development, performance standards



## LEARNING AND GROWTH PERSPECTIVE (continued)

**Suggested Measuring Method:**

Based on a supervisory review of each professional personal property management employee=s individual development plan and performance standards, determine:

- (1) The total number of BSC related training courses that were funded for the period and the total number that were completed during the period,
- (2) The number of professional property management employees who have individual development plans based, at least in part, on BSC objectives.
- (3) The number of professional property management employees who have performance standards based on BSC objectives.

**Results:**

- (1) Compare the actual training completion rate with the target for training completion. As necessary, determine the course of action needed to overcome any training shortfalls. Consider tracking the course of action under one of the BSC perspectives, as appropriate.
- (2) Compare the individual development plan alignment rate and the annual performance review completion rate with the target for employee alignment. As necessary, determine the course of action needed to overcome employee alignment shortfalls. Consider tracking the course of action under one of the BSC perspectives, as appropriate.

## LEARNING AND GROWTH PERSPECTIVE

(Objective #3, Core Measure #1)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #3: Ensure employees are adequately trained to successfully support the accomplishment of the Department's missions.</p> <p>Data Source: Individual development plans, performance standards, and training schedules.</p>	<p>Core Measure #1: Percent of personal property management professional employees that have completed the core courses listed in DOE Order 361.1A, Acquisition Career Development Program, Chapter II, Personal Property Management Career Development Program Module, dated April 2004 computed as follows:</p> <p style="text-align: center;"> <math display="block">\% \text{ Trained} = \frac{\# \text{ of professional employees completing core training}}{\text{total \# of professional employees}}</math> </p>	<p>National Target: 100% of professional staff trained within five years.</p> <p>Local Target: National target or better.</p>



## LEARNING AND GROWTH PERSPECTIVE

**Objective #3:** Ensure employees are adequately trained to successfully support the accomplishment of the Department=s missions.

**Core Measure#1:** Percent of personal property management professional employees that have completed the core courses listed in DOE Order 361.1A, Acquisition Career Development Program, dated April 1999, computed as follows:

$$\% \text{ Trained} = \frac{\text{No. of Professional Employees Completing Core Training}}{\text{Total Number of Professional Employees}}$$

**National Target:** 100% of professional staff trained within five years.

**Local Target:** National target or better.

**Suggested Data Sources:** Individual development plans, performance standards, and training schedules.

**Suggested Measuring Method:** Establish a time-phased training plan that will result in the completion of core training for each professional employee within five years. Annually review the training plan to ensure that each employee is on track to complete the core training within the specified time period.

**Results:** As part of the annual review, determine what needs to be done, if anything, to ensure that all core training is completed within the required five years. Implement adjustments as necessary.



## Financial Perspective

(Objective #1, Core Measure #1)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #1: Strive for optimum efficiency of direct operations personal property management operations.</p> <p>Data Source: Cost accounting and performance databases.</p>	<p>Core Measure #1: Establish and maintain cost and performance data for targeted processes (e.g., physical inventory, warehousing, and disposition).</p> <p>Core Elements: None. However the measure, intended to provide trend data for use in determining cost efficiency for targeted direct operations personal property management processes, should provide feedback on those processes that are the <u>major</u> cost drivers.</p>	<p>National Target: Establish a cost and performance baseline for each targeted process and trend the cost annually.</p> <p>Local Target: Establish a cost and performance baseline for each targeted process and trend the cost annually.</p>

## FINANCIAL PERSPECTIVE

<b>Objective:</b>	Strive for optimum efficiency of direct operations personal property management operations.
<b>Core Measure #1:</b>	Establish and maintain cost and performance data for targeted processes (e.g., physical inventory, warehousing, disposition).
<b>Core Elements:</b>	None. However the measure, intended to provide trend data for use in determining cost efficiency for targeted direct operations personal property management processes, should provide feedback on those processes that are the <u>major</u> cost drivers.
<b>National Target:</b>	Establish a cost and performance baseline for each targeted process and trend the cost annually.
<b>Local Target:</b>	Same as above.
<b>Suggested Data Sources:</b>	Cost accounting and performance databases.
<b>Suggested Measuring Method:</b>	For each targeted process, collect and trend prior/current year(s) cost and performance data. Data should be collected in sufficient detail to allow trending and analyses of major subelements of the targeted processes. For trending purposes, collect a minimum of 3 years of data for each targeted process.
<b>Results:</b>	Review the established cost and performance trends. Determine which of the major processes to target for tracking under the Financial core measure #2.

## FINANCIAL PERSPECTIVE

(Objective #1, Core Measure #2)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #1: Strive for optimum efficiency of direct operations personal property management operations.</p> <p>Data Source: Accounting and performance databases.</p>	<p>Core Measure #2: Determine the efficiency (cost vs. performance) of targeted processes.</p> <p>Core Elements: None. However the measure, intended to provide trend data for use in determining cost efficiency for targeted direct operations personal property management processes, should provide feedback on those processes that are the <u>major</u> cost drivers.</p>	<p>National Target: Demonstrate an improving trend in efficiency for targeted processes. An improving trend may be demonstrated through (1) lower costs for the same level of performance, (2) improved level of performance for the same costs, or (3) a combination of lower costs and improved level of performance. The Department recognizes that achieving long term efficiency in some targeted processes may require incurring higher costs initially.</p> <p>Local Target: Same as national target.</p>



## FINANCIAL PERSPECTIVE

<b>Objective:</b>	Strive for optimum efficiency of direct operations personal property management operations.
<b>Core Measure #2:</b>	Determine the efficiency (cost vs. performance) of targeted processes.
<b>Core Elements:</b>	None. However the measure, intended to establish the level of efficiency for major direct operations personal property management processes, should provide feedback on the efficiency of those processes that are the <u>major</u> cost drivers.
<b>National Target:</b>	Demonstrate an improving trend in efficiency for targeted processes. An improving trend may be demonstrated through (1) lower costs for the same level of performance, (2) improved level of performance for the same costs, or (3) a combination of lower costs and improved level of performance. The Department recognizes that achieving long term efficiency in some targeted processes may require incurring higher costs initially.
<b>Local Target:</b>	Same as above.
<b>Suggested Data Source:</b>	Accounting and performance databases.
<b>Suggested Measuring Method:</b>	For each targeted process, review cost and performance trends from data collected under Financial core measure #1. Determine which targeted processes are in need of improved efficiency. Establish a priority among the targeted processes in most need of improvement.
<b>Results:</b>	Select at least one of the highest priority processes for process improvement/reengineering. Identify the course of action needed to improve process efficiency. Consider tracking the course of action under one of the BSC perspectives, as appropriate.

## FINANCIAL PERSPECTIVE

(Objective #2, Core Measure #1)

OBJECTIVE	MEASURE	NATIONAL TARGET
<p>Objective #2: Ensure the fleet is comprised of vehicles needed to meet the site's mission and still achieve maximum economy and efficiency.</p> <p>Data Source: Vehicle inventory, internal vehicle utilization records, trip records and fleet systems.</p>	<p>Core Measure #1: By each non-law enforcement sport utility vehicle (SUV), compare the number of trips made that required driving on other than normal road conditions with the total number of trips the SUV made.</p> <p>Core Elements: Based on statistics that SUVs are less economical and efficient to drive, determine if SUVs were required to accomplish assigned tasks during the period. By vehicle, compare the number of trips each SUV made that required driving on other than normal road conditions with the total number of trips each SUV made.</p>	<p>National Target: 90% of each SUV's trips require driving on other than normal road conditions</p>

## FINANCIAL PERSPECTIVE

- Objective #2:** Ensure the fleet is comprised of vehicles needed to meet the site's mission and still achieve maximum economy and efficiency.
- Core Measure #1:** By each non-law enforcement sport utility vehicle, compare the number of trips made that required driving on other than normal road conditions with the total number of trips the SUV made.
- Core Elements:** Based on statistics that SUVs are less economical and efficient to drive, determine if SUVs were required to accomplish assigned tasks during the period. By vehicle, compare the number of trips each SUV made that required driving on other than normal road conditions with the total number of trips each SUV made.
- National Target:** 90% of each SUV's trips require driving on other than normal road conditions
- Local Target:** To be determined, if appropriate.
- Suggested Data Source:** Vehicle inventory, internal vehicle utilization records, trip records, and fleet systems.
- Suggested Measuring** Compare the number of trips each SUV made that required driving on other than normal road conditions with number of trips the SUV made.
- Method:** By vehicle: 
$$\frac{\text{\# of SUV trips made in other than normal conditions}}{\text{\# of SUV trips made}} = \% \text{ of SUV trips that required the use of this type of vehicle}$$
- Results:** By SUV, report the percent of trips that required driving on other than normal road conditions (e.g., off-road, extreme weather conditions, etc.) during the period. Determine if the most economical and efficient vehicles are being used to perform your sites' mission. For vehicles that do not meet the national target nor has a local target established, note any extenuating circumstances that may be taken into consideration for maintaining the vehicle.





## FINANCIAL PERSPECTIVE

(Objective #3, Core Measure #1)

<b>OBJECTIVE</b>	<b>MEASURE</b>	<b>NATIONAL TARGET</b>
<p>Objective #3: To ensure DOE meets the reduction of petroleum consumption requirement of Executive Order (E.O.) 13149.</p> <p>Data Source: Federal Automotive Statistical Tool (FAST) System, internal fuel use records, vehicle utilization records and strategy for acquiring alternative fuel vehicles.</p>	<p>Core Measure #1: The percent of reduced petroleum consumption within entire motor vehicle fleet as compared with FY 1999 petroleum consumption levels.</p> <p>Core Elements: The measure is intended to demonstrate, by trending data, the level of petroleum consumption reduction accomplished within the motor vehicle fleet.</p>	<p>National Target: As compared to FY 1999 petroleum consumption levels, for FY 2005, demonstrate a significant improving trend in reducing the net petroleum consumption, and by FY 2008, achieve at least a 20 percent petroleum consumption reduction.</p> <p>Local Target: Same as national target.</p>

## FINANCIAL PERSPECTIVE

<b>Objective #3:</b>	To ensure DOE meets the reduction of petroleum consumption requirement of Executive Order (E.O.) 13149.
<b>Core Measure #1:</b>	The percent of reduced petroleum consumption within entire motor vehicle fleet as compared with FY 1999 petroleum consumption levels.
<b>Core Elements:</b>	The measure is intended to demonstrate, by trending data, the level of petroleum consumption reduction accomplished within the motor vehicle fleet.
<b>National Target:</b>	As compared to FY 1999 petroleum consumption levels, for FY 2005, demonstrate a significant improving trend in reducing the net petroleum consumption, and by FY 2008, achieve at least a 20 percent petroleum consumption reduction.
<b>Local Target:</b>	Same as above.
<b>Suggested Data Source:</b>	The Federal Automotive Statistical Tool (FAST) system, internal fuel use records, vehicle utilization records, fleet systems and strategy for acquiring alternative fuel vehicles.
<b>Suggested Measuring Method</b>	<p>Compare (1) the FY 1999 petroleum consumption level with (2) the current year petroleum consumption level. Determine if the target was met.</p> <p>(Subtract current year consumption level from FY 1999 petroleum consumption level. Divide the difference by the FY 1999 petroleum consumption level.)</p>
<b>Results:</b>	Report the percent of decrease or increase of petroleum consumption. Sites not making progress in reducing petroleum consumption should demonstrate that it has made substantial good faith efforts to comply, along with a plan for compliance.

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