

Federal Retiree Re-engagement and Talent Re-Infusion:

AN INNOVATIVE CRM SOLUTION

The loss of highly specialized know-how as federal employees retire is disconcerting for many federal agencies.

The expertise of career federal employees in fields such as the sciences, acquisition, technology, engineering, programming, security, energy, and others is lost as baby boomers leave federal agencies. In many cases, government project and program leaders require rapid access to highly-qualified personnel with agency- or government-specific expertise. Traditional methods of such re-engagement – based on conventional federal hiring practices – have been less than optimal. One way to address this issue is to implement a robust CRM-based system for re-engaging federal retirees in the government arena. This white paper addresses this challenge and describes a retiree re-engagement system that serves as a feasible solution.



THE RISK OF GOVERNMENT INSTITUTIONAL TALENT LOSS

“Strategic human capital management” remains on the General Accounting Office’s (GAO) “high-risk list” in its February 15, 2017 report [1]. Federal leaders are highly concerned about the impact “institutional talent loss” in the wake of mass “baby boomer” retirements. For example, the Office of the Inspector General (OIG), Social Security Administration’s (SSA) report on SSA rehired annuitants states that “the SSA, like many other federal agencies, is facing the loss of its most experienced employees” [2].

This issue is particularly acute in areas of highly-specialized expertise. “Mission critical skills gaps within the federal workforce pose a high risk to the nation,” states the GAO report [1]. Expert know-how and experience in specific disciplines in the sciences, acquisition, technology, engineering, programming, security, energy, and many others is difficult or impossible to quickly replace when federal experts in these areas retire. Entry-level, and even mid-level, federal workers rarely possess the same depth and breadth of agency-specific know-how that retirees have acquired over decades of public service. The steady and continued loss of institutional experience and judgment is causing a form of “brain drain” in many federal agencies. In some cases, the skill sets lost are essential to ensuring effective ongoing and new mission critical work.

The challenge for government human resources (HR) and program leaders is to effectively close the widening and expanding talent

gap. According to the GAO report, “In our 2015 update, we noted that while OPM and agencies had made strides in developing an infrastructure for identifying and addressing skills gaps, they needed to do additional work to more fully use workforce analytics to identify their gaps, implement specific strategies to address these gaps, and evaluate the results of actions taken so as to demonstrate progress in closing the gaps” [1].

“Mission critical skills gaps within the federal workforce pose a high risk to the nation”

GAO Report, 2017 [1]

Another challenge is that the need for some specialized skills may not currently exist, but the need may arise in the future as new projects are initiated. In some cases, accurately predicting when or if these skills will be needed is difficult or impossible. However, if the specialized project is initiated, the skillsets – which may not have been needed for some time – would acutely be needed. One example is the potential future need for personnel with specialized needs for the design and construction of nuclear power plants.

EXAMPLES OF AGENCY REHIRING TO FILL CRITICAL NEEDS

Federal agencies need a robust retiree re-engagement mechanism to help meet time sensitive government human capital management requirements and effectively mentor new full-time equivalents (FTEs). History has shown that federal retirees are

indispensable during emergencies and high priority national initiatives. For example, many government leaders scrambled to rehire federal retirees during the height of the American Recovery and Reinvestment Act (ARRA) of 2009 [3]. ARRA created the need to rapidly recruit seasoned acquisition and grants staff, to handle the massive increase in grant and contract solicitations.

The Federal Emergency Management Administration (FEMA) actively recruits retired Coast Guardsmen as part of FEMA’s U.S. Coast Guard Retiree to FEMA Reservist Initiative [4]. Having skilled emergency responders, including rehired military retirees and veterans, is critical to FEMA and the American public during times of natural disasters.

The SSA rehires federal retirees to serve in critical positions where expertise and experience is a must [2]. These are a few examples of why federal agencies have such a critical need to “reinfuse” the workforce with talented, pre-qualified retirees. These retirees can help federal leaders bridge the human resource gap and help equip the next generation workforce.

THE NEED FOR AN EFFICIENT WAY TO IMPROVE FEDERAL RETIREE RE-ENGAGEMENT

One way to mitigate the federal skill gap is to invite high performing retirees to return to work at their agency (or at other agencies) to help deliver mission critical services to the American people. The idea here is to encourage retiree engagement in government projects to effectively re-infuse high demand expertise. Many retirees

are likely to welcome this opportunity to contribute again to their agency, especially in light of the potential for working less than 40 hours per week and more convenient hours. Another reason that such an opportunity is likely to be appealing to retirees is that many of them are not fully self-sufficient financially (e.g., due to inadequate savings for retirement) [5].

To fill the need for rapid or emergency hiring, federal agencies have traditionally used conventional federal hiring processes that were designed to fill permanent, full-time “open competitive” or “merit promotion” positions. However, these systems are not optimum for rapid, time-limited, retiree re-engagement hiring or volunteer opportunity announcements because they were not designed for this purpose. Until recently, there was no efficient information system designed specifically to invite retirees to register for employment or volunteer re-engagement; identify retiree expertise and skillsets; input demographic information and availability for future engagements; and match up qualified retirees with critical projects.

Federal agencies need an automated solution to rehire and re-engage retired federal top performers or retirees with niche skillsets. Hiring officials could use this system to quickly identify qualified retirees from an agency database when needs arise to quickly “re-infuse” the organization with expertise. A robust customer relationship management (CRM)-based system is an essential part of such a solution; the system could serve as a data store to maintain information on a cadre of pre-screened, in-demand retired federal experts.

BENEFITS OF FEDERAL RETIREE TALENT RE-INFUSION

The benefits of a retiree re-engagement system are significant. A key benefit is that agency HR and program leaders can stay in active contact with esteemed federal retirees. Additional benefits include:

- Identification and capture of retiree interest (as soon as they depart) for potential future work re-engagement

- Identification of applicable, specialized talent in a timely fashion, enabling rapid retiree response to urgent employment or volunteer solicitations
- Identification of talent with highly specialized skills, applicable clearances, and ability to operate in conformance with various security and other requirements, including skill sets that may have been unused for some time, but may be acutely needed as future projects arise
- Facilitation of communication and collaboration between retirees and project leaders to gain opinions, expertise, and judgment, without formally engaging retirees on a permanent or temporary basis
- Cross-pollination of retiree talent across federal agencies and departments

Remaining in active contact with esteemed federal retirees can yield a range of benefits.

A ROBUST IT SOLUTION TO FILL THE TALENT GAP

One approach to improve retiree re-engagement is the deployment of an on-premise or cloud-based Retiree Re-engagement Ecosystem built on the FedRAMP-approved, Microsoft® Dynamics™ 365 CRM platform. As shown in Figure 1, HR specialists can invite esteemed federal retirees to register in the Retiree Re-engagement Ecosystem. The system enables retirees, HR specialists in the agency, program and project managers in the agency, and third-party users (e.g., authorized personnel from other departments or federal agencies) to collaborate, post and review events, news, and other content.



Figure 1. Retiree Re-engagement Ecosystem: Engagement Enrollment Process

HOW THE SYSTEM WORKS

In this system, when a federal employee retires, the agency HR personnel system produces a data file with retiree basic information. If the retiree possesses in-demand agency or government specialized skills, the HR department invites the retiree to register in the retiree re-engagement portal. Hence, retiree access to this portal is through an invitation-only process. If the retiree agrees to participate, the retiree enters information on tenure, job details, skill matrix, job category, clearances, and other information using an easy to navigate, intuitive, and responsively designed re-engagement portal. (In the future, a link to the retiree's LinkedIn® profile can expedite this process, potentially resulting in more thorough and up-to-date documentation of skillsets.) Once this information is entered, HR personnel and project leaders can identify paid and volunteer opportunities and collaborations that match the skill set of the retiree and inquire as to retiree interest in each opportunity. Figure 2 shows key features of the re-engagement system.

In addition, federal retirees can interact with other retirees and current FTEs on project matters and other relevant discussion topics using the portal communication capabilities. HR personnel can also use the “events” option to set up various types of virtual or in-person events, such as career open houses, workshops, webcasts, conferences, etc. HR personnel and project teams will also be able to broadcast news to retiree communities. Third parties (e.g., federal HR personnel or project leaders from other agencies) can also participate and collaborate, as appropriate.

MERP Systems Inc., “Retiree Re-engagement Ecosystem” is built on Microsoft Dynamics 365 and is

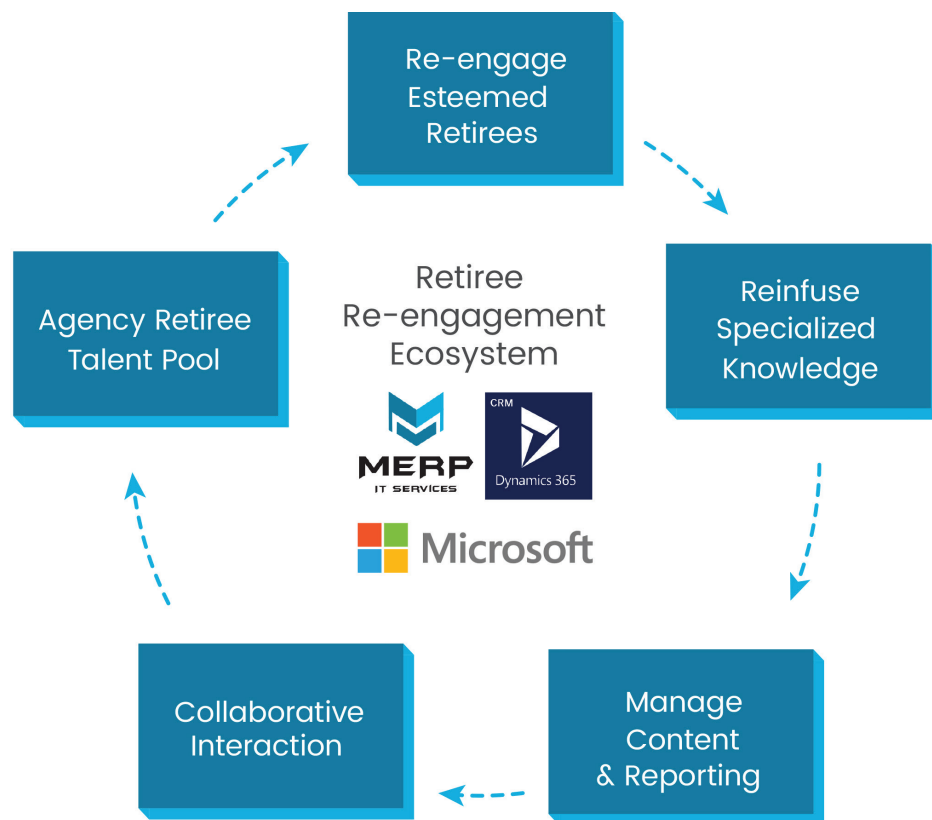


Figure 2. Key features of the Retiree Re-engagement Ecosystem

FedRAMP approved^{i}. The system provides scalable security features that are built into Microsoft's CRM core application based on Microsoft's “Scalable Security Modeling” methodology. Agency systems administrators can custom-define role-based security at the system, user, and record access levels. Security controls are highly configurable, enabling system administrators to quickly and easily configure and manage system access and security.

CONCLUSION

When highly skilled federal staff members retire, they take years of experience and specialized agency specific expertise with them. Budget uncertainty, continuing resolution, federal employment freezes, reorganizations, and other unpredictable events make it difficult to maintain a productive,

vibrant federal workforce. Too often, new federal hires are left to “re-create the wheel” or learn by trial and error. The Federal Retiree Re-engagement Ecosystem, developed by MERP Systems Inc., is a CRM-based tool that is built on the FedRAMP-approved Microsoft® Dynamics™ 365 platform. This system can help meet the need for specialized talent and ensure agencies can re-engage retired expert workers quickly and efficiently.

{i} The Federal Risk and Authorization Management Program (FedRAMP) is a government-wide program that provides a standardized approach to security assessment, authorization, and continuous monitoring for cloud products and services.

ABOUT MERP SYSTEMS, INC.

MERP Systems, Inc. provides a Microsoft® Dynamics™ 365-based CRM Retiree Re-engagement Ecosystem solution designed to meet the need for federal retiree re-engagement and talent re-infusion. MERP Systems is a certified Microsoft® Dynamics™ 365 partner. Established in

2010, MERP Systems specializes in scientific, engineering, business, and administrative database development, web development and content management, IT facility operations and maintenance, IT portfolio rationalization, and more.

MERP Systems is an SBA 8(a)-certified, small, woman-owned small business (WOSB), and a Minority Disadvantaged Business Enterprise (SWaM) with the Commonwealth of Virginia. GSA Schedule 70: Contract# GS-35F-409CA. DUNS# 969054720.



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