Employee Survey Playbook: A Guide for Federal Agencies to Design, Administer, and Report Employee Feedback

U.S. Office of Personnel Management

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Section 1128 of the National Defense Authorization Act for Fiscal Year 2004 (Pub. L. 108-136, 5 U.S.C. 7101 note) requires executive agencies to survey their workforce annually on topics including performance management, leadership and organizational alignment, workplace culture and employee experience. This Playbook is designed to help agencies meet those requirements from initial planning through data submission regardless of agency size, survey maturity, or available resources.

The Playbook addresses the full survey lifecycle: eligibility and governance decisions, platform selection, survey design, administration, response monitoring, post-survey reporting, and U.S. Office of Personnel Management (OPM) data submission. Agencies may use sections independently or as a whole, depending on where they are in the planning process.

Throughout, the Playbook highlights cost-efficient approaches, opportunities to use existing internal resources, and practical recommendations drawn from survey research and federal practice.

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Suggested Survey Timeline

Federal Executive Branch agencies (including Departments, large independent agencies, and small independent agencies) must administer an annual employee survey each fiscal year. Planning should begin well in advance of the intended launch date. The timeline below reflects a typical enterprise survey cycle. Agencies already conducting internal surveys or working with existing infrastructure may compress some phases. Agencies should not need to procure outside vendors to complete the survey.

Timeframe	Activity
8–12 weeks before launch	Establish governance; confirm eligibility criteria; select platform; consider Information Collection Request (ICR) review and approval
6–8 weeks before launch	Finalize survey items; complete privacy coordination; program and test survey
4–6 weeks before launch	Develop communications plan; prepare helpdesk process
2 weeks before launch	Validate final roster; confirm IT and platform readiness
Launch week	Distribute invitations; activate helpdesk
Survey administration period	Send reminders; monitor response rates; address technical issues
Survey close	Validate data; conduct quality assurance
2–6 weeks post-close	Analyze results, when response rates are low or when response rates vary substantially across organizational units agencies should allow 1-2 weeks to conduct non-response bias analysis before finalizing results; develop reports
Final phase	Brief leadership; share results with employees; complete action planning; submit data to OPM and Office of Management and Budget (OMB) **(Note: data must be submitted to OPM and OMB within 90 days of survey completion)**

1. Pre-Survey Administration: Planning and Design

A successful survey administration starts well before launch. Early planning includes defining who will be surveyed, what content will be included, what privacy protections must be in place, and how results will be reported. Agencies that invest in planning reduce costly mid-field corrections and produce more reliable, actionable data.

1.1 Establish Governance

Designating clear roles before planning begins prevents gaps in accountability and ensures that the right people are involved at the right stages. The table below outlines key roles and responsibilities. Agencies should adapt this structure to their size and organizational context; smaller agencies may consolidate several roles.

Role	Responsibilities
Survey Program Manager	Overall administration oversight; timeline management
HR / People Analytics/ Statistical Officer	Population files; sampling decisions; reporting and analysis; weighting decisions, non-response analysis, item development, and data quality review
Office of General Counsel	Legal authority; compliance review; oversight
Senior Agency Official for Privacy (SAOP), Chief Privacy Officer, or equivalent agency Privacy Officer	Provide privacy program oversight throughout survey lifecycle and determine applicable privacy requirements
IT / CIO Office	Platform review; security and accessibility compliance; IT whitelisting
Communications Team	Employee messaging; promotion strategy
Leadership Sponsors	Visible promotion; accountability for action planning
Paperwork Reduction Act (PRA) Compliance Officer	Ensures appropriate ICR planning and approval is included in the process

Recommended practice: Convene a brief kickoff meeting with all stakeholders at the start of the planning phase. Establish a shared timeline, assign owners for each major activity, and agree on a process for resolving decisions that require cross-functional input.

1.2 Determine Eligibility Criteria

Clearly define who will be invited to participate in the survey. Agencies have discretion in setting eligibility criteria and should document their decisions for future replication.

Key Eligibility Decisions

Consideration	Examples
Onboard cutoff date	Employees onboarded on or before a specified date
Employment type	Full-time, part-time, intermittent, seasonal
Worker category	Federal employees, interns, fellows
Leave status	Employees on extended leave
Organizational inclusion	Headquarters (HQ), field offices, components, task forces

Recommended practices:

- Coordinate with HR and IT to obtain accurate employee counts and support response-rate monitoring throughout fielding.
- Document inclusion and exclusion rules clearly so that future administrations can replicate the same population definition or make deliberate, documented changes.
- Choose an approach that is practical, feasible, and meaningful for the agency's reporting goals.

1.3 Survey Platform and IT Specifications

The survey platform is the technical foundation for administration. Select a survey platform that meets federal security, accessibility, and operational requirements.

Key platform features to evaluate:

- Federal cybersecurity compliance
- Section 508 accessibility compliance
- Mobile responsiveness
- Support for anonymous or confidential survey distributions
- Unique survey links (if applicable)
- Automated reminder functionality
- Data export capability

- Encryption, role-based access controls, and other safeguards appropriate to protect survey information throughout its lifecycle

Recommended practice: Coordinate with IT offices to whitelist survey communications, test firewall compatibility, validate authentication methods, confirm email deliverability, and conduct usability testing before launch. Agencies should also coordinate with their privacy program and information officer and information security officials before survey administration.

Cost efficiency note: Before procuring a new survey platform, agencies should evaluate whether tools already available within their IT environment, such as Microsoft Forms (available through existing Microsoft 365 licenses) or similar agency-licensed platforms, can meet their needs for the annual survey. These tools may satisfy basic requirements at no additional cost. Agencies with limited budgets are encouraged to consult with their CIO office to inventory available platforms before pursuing a separate procurement. When a dedicated survey tool is necessary, agencies should seek options available through existing governmentwide contract vehicles. For example, Microsoft Forms is a straightforward option for agencies already operating within a Microsoft 365 environment. It enables users to quickly build surveys, incorporate a variety of question types, customize the layout, and distribute the survey to respondents. Responses are collected automatically and can be reviewed directly within Microsoft Forms or exported to Excel for further analysis.

For agencies unfamiliar with the tool, Microsoft provides step-by-step guidance through its official support documentation: Create a form with Microsoft Forms — Microsoft Support

1.4 Determine Survey Administration Approach

Several interrelated design decisions shape survey administration: whether to survey all employees or a sample and how to handle respondent identity and link distribution. These decisions affect data quality, platform requirements, privacy obligations, and reporting granularity. It is recommended to consult your Statistical Officer throughout this process.

Sample Survey vs. Census Survey

Census Survey	Sample Survey
Surveys all eligible employees	Surveys a statistically representative subset of employees
Advantages	**Advantages** • May reduce cost and burden

- Supports detailed organizational reporting and subgroup analyses - Straightforward employee messaging - Simplest design	- Faster administration - Useful for pulse or targeted surveys
Considerations - Larger administration burden - Potentially more complex reporting (if applicable)	**Considerations** - Requires statistical sampling to ensure representativeness - Limits reporting granularity due to response rates and privacy considerations

A census survey collects responses from all eligible employees; a sample survey collects responses from a statistically representative subset. Agencies choosing a sample approach should consult with their agency's Statistical Officer to ensure representative results.

Recommended practice: When deciding between census and sample, consider your survey goals, reporting plans, population size, staffing resources, and intended follow-up actions.

Cost efficiency note: For smaller agencies or those with limited administrative capacity, a census approach using an existing licensed platform may be simpler and more cost-effective than designing and validating a statistical sample. Conversely, larger agencies may find that a well-designed sample reduces platform and personnel costs while still producing reliable results.

Statistical Official note: Agencies choosing a sample design should work with their agency's Statistical Official before finalizing the sampling plan. The plan should document at minimum: the sampling frame (complete list of all eligible employees), stratification variables (e.g., organizational unit, supervisory status), the target sample size, and the method for randomly selecting sampled employees. Without this documentation, results may not be statistically defensible for cross-unit or agency-wide reporting.

Anonymous vs. Unique-Link Administration

When selecting a survey distribution method, consider agency goals for confidentiality, response tracking, follow-up communications, and data analysis.

Anonymous Survey	Unique-Link Survey
Respondent identities are not collected or linked to responses	Each participant receives a personalized link tied to a participation record
Advantages • May increase candor	**Advantages** • Better response tracking • Prevents duplicate submissions • Targeted reminders • Enhanced reporting integration
Considerations • Limited follow-up capability • Reduced nonresponse monitoring • Could result in duplicate responses from one employee • Could result in inaccurate organizational reporting	**Considerations** • Requires stronger privacy safeguards • Requires clear employee communication regarding confidentiality

Recommended practice: For either approach, agencies should communicate clearly to employees whether responses are anonymous or confidential, who has access to the data (agencies need to include who within the agency will have access and that record level data will be provided to OPM and OMB), and how results will be reported. Ambiguity on this point is one of the most common drivers of low participation. It is recommended that agencies review the methodology with their Privacy Officer and adhere to any requirements for collecting survey data within their agency. See Section 1.6 for more information.

Note for anonymous surveys: Anonymous administration eliminates the ability to target reminders to non-respondents and creates a risk of duplicate responses from a single employee, which could skew results. Agencies using anonymous surveys should document this as a limitation in the methodology writeup submitted to OPM and should consider technical controls (such as limiting one response per device or network session) where feasible without compromising anonymity.

1.5 Develop Survey Items

Survey content must include the items prescribed in 5 CFR 250 and may also include agency-specific items that reflect organizational priorities.

Required Items (5 CFR 250)

The following 10 items must be included in the annual employee survey. Items 1–9 use a five-point agreement scale (Strongly Agree, Agree, Neither Agree nor Disagree, Disagree, Strongly Disagree). Item 10 uses a "select all that apply" format and must be coded accordingly for OPM submission. Item 10 differs from Items 1–9 in format because it asks employees to characterize an outcome rather than express agreement with a statement. It accepts multiple responses. See Section 3.4 for required coding for OPM and OMB submissions.

1. Managers clearly communicate the goals of the organization.
2. The people I work with cooperate to get the job done.
3. In my work unit, differences in performance are recognized in a meaningful way.
4. My supervisor provides ongoing feedback to help me succeed and progress in my career.
5. My supervisor holds my team accountable for achieving results.
6. I know how my work relates to the agency's goals.
7. I feel empowered to get things done at my organization.
8. I can disclose a suspected violation of any law, rule or regulation without fear of reprisal.
9. In my work unit, steps are taken to deal with a poor performer who cannot or will not improve.
10. In my work unit, poor performers usually (select all that apply):
    - Remain in the work unit and improve their performance over time;
    - Remain in the work unit and continue to underperform;
    - Leave the work unit – removed or transferred;
    - Leave the work unit – quit;
    - There are no poor performers in my work unit.

Definitions

To help employees interpret items consistently, agencies must define the terms "manager" and "supervisor" as being used in survey materials. The definitions below are recommended. Agencies may adapt them to reflect their organizational structures but should document any modifications.

Term	Definition
Managers	Those in management positions who typically supervise one or more supervisors.
Supervisors	First-line supervisors are typically responsible for employees' performance appraisals and leave approval.

Agency-Specific Items

Agencies may include additional items beyond the 10 required items but are not required to do so. There is no limit on the number of supplemental items. Additional items must go through PRA ICR review and approval. When developing additional items, consider the following priority areas:

- Leadership priorities and strategic initiatives
- Workplace culture and inclusion
- Change management
- Employee engagement and well-being

Best practices for survey item development:

- Write one idea per item. Avoid double-barreled questions that ask about two things simultaneously.
- Avoid leading or loaded wording that steers respondents toward a preferred answer.
- Keep items concise and include only necessary information.
- Select a response scale appropriate to what you are measuring (see Appendix A for examples).
- Include a "Don't Know" or "No Basis to Judge" option or incorporate survey programming to allow participants to skip past items that do not apply to them.
- Define any key terms used in agency-specific items. Sample definitions are provided below.
- Consult with your agency’s Statistical Official for technical questions.

Term	Definition
Senior Leaders	The heads of departments/agencies and their immediate leadership team responsible for directing the policies and priorities of the department/agency. They may hold either a political or career appointment and typically are members of the Senior Executive Service or equivalent.
Non-supervisor	Anyone who does not have supervisory responsibilities.
Alternative Work Schedule	This refers to a Compressed Work Schedule (a fixed work schedule under which a full-time employee completes an 80-hour biweekly work requirement in less than 10 workdays) or Flexible Work Schedule (a work schedule that allows an employee to determine his or her own schedule within the limits set by the agency).
Work Unit	This is your immediate work unit headed by your immediate supervisor.
Organization	This is your agency, office, or division. Please respond to these questions based on the level in your organization that is appropriate for the content of the question. Depending on how your organization is structured, this could either be one or more levels above your own.

Recommended practice: Agencies do not need to contract out survey item development. HR specialists, people analytics staff/Statistical Officer, and program managers often have the knowledge and skills to develop and review supplemental items internally. OPM can also provide assistance. Peer review of draft items by a small internal working group (consider statistical units that may exist within the agency) can improve quality without added cost.

Demographic Items

Consider whether to include demographic items that allow your organization to understand how responses vary across groups such as age, sex, location, job role, or experience level. This information supports more nuanced analysis, helps identify trends or disparities, and enables more targeted action planning.

Note that collecting demographic information may affect your anonymity approach and privacy obligations. Coordinate with your Privacy Officer/Statistical Officer and Office of General Counsel when finalizing demographic items (see Section 1.6).

Demographic variable examples

Demographic Area	Examples
Supervisory Status	Supervisor, manager, non-supervisor
Tenure	Years of service
Grade/Pay Band	General Schedule (GS) level or pay band
Location	HQ, regional office, field office
Occupational Information	Series, bargaining unit status

1.6 Privacy Requirements: System of Records Notice (SORN) and Privacy Act Statement

Collecting data about employees creates statutory obligations. Agencies should engage privacy officials early in the planning process to understand and fulfill these requirements.

Why this is important: Employee survey data can include information that is sensitive individually even when reported in aggregate. Early privacy coordination prevents delays, protects employees, and ensures the agency meets its legal obligations before data collection begins.

System of Records Notice (SORN)

Determine whether an employee survey falls under an existing SORN at the agency, or if it requires a new or updated notice. For reference, the SORN governing the Federal Employee Viewpoint Survey (FEVS) when it was centralized at OPM can be found in the Federal Register here. Note that this SORN only applies to OPM and is not transferable to individual agencies.

Privacy Act Statement

If collecting personally identifiable information (PII), a statement must be provided to respondents, including: legal authority for collection, purpose of collection, routine uses (also stated in the applicable SORN), disclosure requirements (voluntary or mandatory).

Data Management, Confidentiality, and Disclosure Avoidance

- Review data retention policies and records management requirements at your agency, and in coordination with National Archives and Records Administration (NARA) as needed to establish or apply an appropriate records retention schedule.

- Establish confidentiality protections and disclosure avoidance procedures, such as limiting reports to groups with at least 10 respondents and suppressing demographic breakouts for small groups to protect individual confidentiality. Consider consulting with the Statical Officer within the agency if applicable. Note, confidentiality assurances with be required to be described in PRA ICR packages.

Recommended Coordination

The table below provides an example of recommended coordination activities to ensure privacy and security.

Office	Role
Chief Privacy Officer	SORN review; Privacy Act statement
Statistical Officer	Guidance as needed
Office of General Counsel	Legal authority; compliance review
Records Management	Retention schedules
CIO/IT Security	Data security; access controls

1.7 Identify Organizational Levels and Reporting Structure

When defining organizational levels, consider the goals for how the agency intends to analyze and report results. Determine the level at which results should be reported, such as, agency-wide, by component, or by subcomponent.

Decide the organizational reporting structure before the survey launches because it directly affects whether a census or sample is needed, how the survey platform must be configured, and how much pre-survey roster work is required.

Options for Capturing Organizational Data

The table below outlines options for capturing employee organizational data.

Front-End Selection	Back-End Integration
Employee selects where they work on one or more items on the survey	Organizational information comes from personnel/payroll database
Advantages • Simpler implementation for a limited number of work units • Can be used with anonymous and confidential survey design	**Advantages** • Greater accuracy • No burden on respondents • Fewer discrepancies in reporting

Considerations	**Considerations**
• Employee selection errors or omissions • Too many work units or branching items can be complicated to navigate	• Survey cannot be anonymous • Requires integration with personnel database(s) • Survey platform capabilities

Recommended practices:

- Use consistent naming conventions across all organizational units.
- Plan for reorganizations or office name changes that may occur before or during the administration window.
- Establish minimum reporting thresholds to protect confidentiality — for example, producing reports only for units with at least 10 respondents.
- Use back-end integration where feasible to improve data quality and reduce respondent burden.
- Maintain consistent unit definitions over time to support year-over-year trend analysis.

1.8 Establish a Help Desk Process

Employees will encounter technical issues, access problems, and questions about confidentiality. A designated helpdesk function (even a simple one) reduces barriers to participation, improves the survey experience, and ensures issues are resolved consistently throughout the administration period.

Support may include:

- Access/link issues
- Technical troubleshooting
- Survey questions
- Privacy/confidentiality concerns
- Accommodation requests

Possible support channels include a dedicated email inbox, phone support, and FAQ intranet page.

Designate a point of contact to own helpdesk operations and ensure they are briefed on the survey design, privacy protections, and escalation procedures before launch.

1.9 Establish Survey Administration Launch Schedule

A launch schedule helps to coordinate internal communications, prepare systems and support resources, manage timelines, and ensure employees have adequate opportunity to participate. Avoid scheduling the survey window during peak operational periods or major holiday periods that reduce employee availability.

Recommended Timeline Components

Phase	Activity
Launch	Invitation email distributed
Week 1	First reminder to non-respondents or all eligible employees
Mid-Field	Second reminder; response rate review
Final Days	Final reminder
Closeout	Survey closes

1.10 Survey Communication and Promotion

Clear and consistent communication increases participation and trust. Agencies should communicate with employees at key points throughout the administration cycle. Communication channels may include leadership emails, town hall meetings, intranet announcements, digital signage, team meetings, and internal newsletters.

The table below summarizes essential communication points.

Phase	Key Messages
Pre-Survey	When the survey opens and closes; which email address it will come from; who is eligible; why participation matters; what confidentiality protections are in place; leadership endorsement
During Administration	Reminders about the deadline; real-time participation updates; reiteration of why the survey matters and how results will be used; how to access the survey link
Post Administration	Thank participants; when and how results will be shared; examples of past actions taken based on survey results; commitment to follow up

2. Survey Administration

Once the survey is launched, the priority shifts to maintaining operational stability, supporting respondents, and encouraging participation. Active monitoring helps identify low response rates, technical barriers, and communication gaps while there is still time to address them.

2.1 Response Rate Monitoring

Monitor participation throughout the administration period. Early identification of low response allows time for targeted outreach before the survey closes.

Key Metrics to Track:

- Overall response rate
- Response rates by subgroup
- Partial completions
- Bounce-backs/undeliverable emails

Monitor daily during the first week after launch and several times per week thereafter. Establish escalation triggers — for example, if overall response falls below a target threshold by mid-field — and identify who is responsible for initiating outreach or escalation when those thresholds are reached.

Note: When overall response rates are low or when response rates vary substantially across organizational units, a non-response bias analysis is warranted before reporting results. This analysis compares the demographic characteristics of respondents against the full surveyed population to assess whether non-response has introduced systematic bias. Agencies in this situation should consult with their agency's Statistical Official prior to finalizing results.

2.2 Reminder Administration

Use reminders strategically to improve participation. Reminders encourage participation, increase response rates, and help ensure employees are aware of survey deadlines and opportunities to provide feedback.

Best practices:

- Target nonrespondents when possible
- Keep reminders concise
- Reinforce confidentiality protections in each reminder
- Include estimated completion time

- Avoid overcommunication that may increase survey fatigue

2.3 Help Desk Operations During Fielding

The helpdesk established in pre-survey planning should be active and staffed from the day invitations are distributed. Volume typically peaks in the first two days after launch and again after each reminder.

During fielding, helpdesk staff should be prepared to:

- Resend or regenerate survey links for employees who did not receive them or whose links have expired
- Troubleshoot access issues related to firewalls, browser compatibility, or authentication
- Answer questions about what "anonymous" or "confidential" means for this survey
- Escalate accommodation requests promptly
- Log all contacts and resolutions for post-survey documentation

3. Post-Survey Administration

After the field period closes, several steps should be taken to ensure the quality and usability of the data collected. This phase encompasses data preparation, confidentiality protection, reporting, action planning, and submission of required data to OPM.

Agencies should require verbal or in written agreement by the employees who have access to the identifiable data that they will not share with others who do not have a need to know.

3.1 Weighting

Weighting is a technique typically performed by statisticians which corrects for biases in survey sampling and responses and helps ensure the generalizability of your results. Biases in surveying can include under-representation of hard-to-reach populations (such as those in the field with limited time to respond) or over-representation of certain groups who are more likely to respond (such as supervisors and managers).

When Is Weighting Necessary?

Not every agency will need to weight its data. Weighting is most important when response rates vary substantially across subgroups and when agency-wide or cross-unit comparisons are a priority. Agencies conducting a census survey with high and relatively uniform response rates may find that weighting has minimal effect on results. Agencies using a sample design, or those with significant variation in response across organizational units, should consult with their Statistical Official before deciding whether and how to weight.

Potential weighting variables may include:

- Organizational unit
- Supervisory status
- Demographic categories
- Geographic location
- Grade level

Maintain documentation on methodology, variables used, adjustment procedures, and limitations. As a resource, a description of the weighting process used for the FEVS in the past can be found in OPM's 2024 Technical Report.

Agencies should include their weighting methodology documentation as part of the data submission to OPM and OMB, covering: the decision to weight or not weight (and the rationale), base weights, any post-stratification adjustments, trimming of extreme weights, and known limitations of the approach.

For census surveys with high and relatively uniform response rates, weighting will typically have minimal effect on results and may not be warranted. The decision not to weight should still be documented and included in the methodology submission to OPM and OMB.

3.2 Reporting

Reports should be clear, actionable, and designed with confidentiality protections built in. Plan your reporting approach before the survey closes so that analysis can begin promptly after data validation.

Report Types

Report Type	Purpose
Executive Summaries	Leadership overview
Organizational Reports	Office-level results
Dashboards	Interactive exploration
Benchmark Analyses	External/internal comparisons
Trend Analyses	Year-over-year tracking

Recommended report components:

- Overall and subgroup response rates
- Favorability scores for each item (percent positive, neutral, negative)
- Year-over-year trend comparisons where available
- Key strengths and improvement opportunities
- Benchmark comparisons, if applicable

Confidentiality and disclosure avoidance in reporting: Suppress results for any group with fewer than 10 respondents. Apply consistent suppression rules across all reports. For demographic breakouts, apply additional caution when small cell sizes could allow individual identification even without meeting the general suppression threshold. The 10-respondent threshold is a minimum standard; agencies should apply higher thresholds when combinations of demographic attributes could allow re-identification even at larger group sizes. Agencies should consult with their Statistical Official and Privacy Officer when finalizing suppression rules for demographic cross-tabulations.

Rollout sequence: A phased rollout is generally advisable — brief senior leadership first, then share results with managers, and finally communicate broadly with employees. This sequence gives leaders time to prepare responses to the results and reduces the risk of employees hearing about findings through informal channels before official communication.

3.3 Action Planning

Results without action erode employee trust in the survey process over time. Employees who complete a survey and never see a response are less likely to participate in future administrations.

Recommended Action Planning Steps:

1. Share results with employees, not just leadership, in a timely and accessible format.
2. Identify two or three priority areas for improvement based on results, agency strategic goals, and available resources. Avoid trying to act on everything at once.
3. Develop specific action plans with named owners, timelines, and measurable outcomes.
    - Recommend including employees from across the organization in developing and implementing action planning.
4. Communicate action plans to employees, including what will and will not be addressed and why.
5. Monitor progress throughout the year and provide interim updates to employees.
6. At the next survey administration, share what changed as a result of prior results.

Recommended practice: Managers at every level should receive results for their unit (where thresholds are met) and be expected to discuss results with their teams. Linking action planning to existing performance management and strategic planning cycles increases the likelihood that commitments are sustained.

3.4 Data Submission Requirements

Requirement 1: Submit Data to OPM and OMB

Agencies must submit required data to OPM and OMB within 90 days of survey completion. Submission covers the 10 required items from 5 CFR 250 only; agencies are not required to submit responses to agency-specific supplemental items. OPM will transmit agencies' submissions to OMB.

Submission Specifications

Element	Requirement
Submission Portal	OPM Collection Portal
File Format	Comma-delimited (CSV)
Record Level	Individual respondent-level records (one row per respondent)

Required Variables	Responses for items 1-9; responses for item 10, unique respondent identifier, work unit or organizational identifier
Additional Information	Include weighting methodology, covering: the decision to weight or not weight (and the rationale), base weights, any post-stratification adjustments, trimming of extreme weights, and known limitations of the approach. Survey methodology covering: sample/census, distribution method, and (if applicable) nonresponse bias study results

Required Coding Scheme

Items 1-9 (agreement scale) must use the following coding scheme when submitted to OPM.

Code	Response
1	Strongly Disagree
2	Disagree
3	Neither Agree nor Disagree
4	Agree
5	Strongly Agree

Item 10 (select all that apply) must use the following coding scheme when submitted to OPM.

Code	Response
1	Remain in the work unit and improve their performance over time
2	Remain in the work unit and continue to underperform
3	Leave the work unit – removed or transferred
4	Leave the work unit – quit
5	There are no poor performers in my work unit

Additional Required Information

If the agency surveyed below the agency level, include a codebook for work unit information. The codebook should list all work units surveyed, their organizational hierarchy, and any codes used in the data file with corresponding unit names.

Include survey methodology information, such as the number of employees surveyed, census or sample approach, eligibility criteria, response rates, and survey open and close dates.

Pre-Submission Quality Assurance

Before submitting, verify the following:

- All required variables are present and correctly named
- Response codes match the required coding scheme
- Response counts align with expected totals
- No personally identifiable information included in the file
- Work unit codes are consistent with the codebook submission

Questions about this process may be directed to .

Requirement 2: Publicly Posting Results

In addition to submitting data to OPM, each agency must make the annual employee survey results available to the public and post the results on its website unless doing so would jeopardize or impact national security. Each agency may determine the manner and content of its public disclosure, provided the results are posted by the end of the calendar year unless security concerns prevent publication.

4. OPM Assistance

OPM is available to support all employees and agency staff with questions related to this effort. For general inquiries, individuals may contact for assistance.

Individuals seeking additional assistance or higher-level support may contact OPM's Human Resources Solutions (HRS) organization at Organizational_Assessments@opm.gov for information on survey design, administration, analysis, reporting services, and procurement options.

Appendix A: Response Scale Examples

Measure	Scale
Agreement	Strongly Agree, Agree, Neither Agree nor Disagree, Disagree, Strongly Disagree
Satisfaction	Very Satisfied, Satisfied, Neither Satisfied nor Dissatisfied, Dissatisfied, Very Dissatisfied
Frequency	Always, Most of the time, Sometimes, Rarely, Never
Quality	Very Good, Good, Fair, Poor, Very Poor
Importance	Extremely important, Very Important, Moderately Important, Slightly Important, Not at all Important

Include a "Don't Know" or "No Basis to Judge" option or incorporate survey programming to allow participants to skip past items that do not apply to them.

U.S. Office of Personnel Management

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