



# Office of the Inspector General

SOCIAL SECURITY ADMINISTRATION

## *Informational Report*

# Staffing Public-facing Offices

022327 | September 2025



# Office of the Inspector General

SOCIAL SECURITY ADMINISTRATION

## MEMORANDUM

**Date:** September 2, 2025

**Refer To:** 022327

**To:** Frank Bisignano  
Commissioner

**From:** Michelle L. Anderson *Michelle L. Anderson*  
Acting Inspector General

**Subject:** Staffing Public-facing Offices

The attached final report provides information on the process the Social Security Administration used to establish staffing levels at its public-facing offices.

If you wish to discuss the final report, please call me or have your staff contact Michelle L. Anderson, Assistant Inspector General for Audit.

Attachment

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## **ABBREVIATIONS**

FO	Field Office
FY	Fiscal Year
OCS	Office of Customer Service
OIG	Office of the Inspector General
OMB	Office of Management and Budget
OPM	Office of Personnel Management
OPSOS	Office of Public Service and Operations Support
POMS	Program Operations Manual System
SSA	Social Security Administration
SSCC	Social Security Card Center
TSC	Teleservice Center

## INTRODUCTION

This report summarizes the process the Social Security Administration (SSA) used to establish staffing levels at its public-facing offices.

## BACKGROUND

Public-facing field offices (FO), Social Security Card Centers (SSCC), and teleservice centers (TSC) are SSA's primary points of contact with the public. FOs and SSCCs process benefit claims and appeals, process applications for Social Security number and Medicare cards, and address the public's urgent needs and questions.<sup>1</sup> TSCs answer a range of Social Security and Medicare-related questions, schedule FO appointments, and provide status updates on claims and appeals.<sup>2</sup> According to SSA, it began Fiscal Year (FY) 2025 with almost 26,000 employees in FOs, more than 4,400 in TSCs, and 168 in SSCCs.

According to the Office of Personnel Management (OPM), workforce planning ensures each Federal agency has the right number of staff to accomplish the Agency's mission. This planning helps organizations address current and future workforce needs thereby helping avoid unnecessary disruptions and maintaining a stable, agile workforce.<sup>3</sup>

Office of Management and Budget (OMB) Circular A-11, *Preparation, Submission, and Execution of the Budget*, requires that Federal agencies have effective workforce planning.<sup>4</sup> The Circular also requires that budget submissions address strategic human capital management and justify associated resources to help the Agency accomplish its program goals. It also directs agencies to link their missions' success, largely attributed to the workforce, to their budget submissions. SSA's FY 2025 budget request included funding for over 32,000 employees in public-facing offices, which represented 54 percent of SSA's workforce.<sup>5</sup>

In 2024, we identified human capital management as a major management and performance challenge for SSA. We determined SSA needed clearer human capital and operating plans that addressed its human capital risks, including limited staffing and increased attrition rates, to ensure its existing human capital will improve service delays and address backlogged workloads.<sup>6</sup>

Since January 2025, SSA's organizational structure and staffing plans have undergone significant changes. In February 2025, SSA announced it was implementing an Agency-wide restructuring initiative to streamline operations and reduce workforce levels. Key changes

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<sup>1</sup> SSA, *POMS*, RM 10201.025, A (October 25, 2023); SSA, *Social Security Handbook*, sec. 110.1 (November 30, 2010).

<sup>2</sup> SSA, *Agency Financial Report Fiscal Year 2024*, p. 12 (November 2024).

<sup>3</sup> OPM, *Workforce Planning Guide*, secs. 1.2 through 1.4, pp.4-5 (November 2022).

<sup>4</sup> OMB, Circular A-11, *Preparation, Submission, and Execution of the Budget*, sec. 85.1 (July 2024).

<sup>5</sup> SSA, *Justification of Estimates for Appropriations Committees Fiscal Year 2025*, table 3.20, p. 143 (March 2024).

<sup>6</sup> SSA, OIG, *The Social Security Administration's Major Management and Performance Challenges During Fiscal Year 2024*, 022401, p. 1 (November 2024).

included reducing the number of regional offices (which provide technical assistance to public-facing offices) from 10 to 4, and realigning office functions and reporting structures.<sup>7</sup>

SSA leadership indicated their reductions in the workforce would significantly focus on functions and employees who do not directly provide mission critical services, which could involve component closures, directed reassignments, and workforce downsizing. To support this transition, the Agency made several voluntary options available to its workforce, including reassignments to mission critical positions in public-facing offices, voluntary separation incentive payments, deferred resignations, and early retirement opportunities.

## **BUDGET FORMULATION**

SSA's budget formulation process begins with estimating the number of work years needed to address estimated workloads for nine components, which includes public (FOs, SSCCs, and TSCs) and non-public-facing components (e.g., Offices of the Chief Information Officer and General Counsel).<sup>8</sup> For public-facing components, SSA calculates the work years it needs to process the work based on certain factors, including: actuarial projections of workload receipts, actual receipts from the prior year, staff productivity rates, analysis of workload processing, and planned service improvements. SSA uses this information to estimate the staffing it will need to handle workloads and builds a staffing plan with estimated labor costs. SSA's Office of Operations and Budget uses these estimates to develop the Agency's budget request for Congress.

SSA calculates the work years it requires for each workload and estimates its overall staffing needs based on the total work years across all workloads. SSA's Operations and Budget components then convert the projected work years into estimated funding needs.

Management in regional offices determine specific staff placements within the hiring allocations set by the Office of Public Service and Operations Support (OPSOS) and the Office of Customer Service (OCS). Regional offices also maintain both maximum hiring ceilings and minimum staffing levels by the end of each FY.<sup>9</sup>

## **BUDGET EXECUTION**

SSA employs a top-down approach to budget execution, in which high-level decisions by leadership guide the distribution of hiring resources across Agency components. When SSA receives its appropriation or an allocation of its appropriation, SSA's Office of Budget works with the Commissioner and executives from the Office of Operations to determine staffing allocations across its components and distributes hiring resources that may consist of the number of hires allocated or hiring ceilings.<sup>10</sup> A hiring ceiling represents the maximum number of employees a

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<sup>7</sup> SSA, *Social Security Announces Workforce and Organization Plans*, Social Security Matters, blog.ssa.gov (February 28, 2025).

<sup>8</sup> A work year represents one full-time employee working for one year.

<sup>9</sup> TSCs have a minimum staffing level, but FOs do not. Hires set for regions may be adjusted because of such factors as hiring capability and emergent needs in other regions.

<sup>10</sup> We requested information on how the Agency determines staffing allocations across its components and followed-up with the Office of Budget. However, the Office of Budget did not provide any additional details on how it and the Commissioner determine these allocations.

region may have, and these ceilings are adjusted annually. Once the Office of Budget provides the Office of Operations—which is responsible for public-facing offices—with its staffing level allocation, OPSOS and OCS distribute regional and subcomponent allocations with the approval of Operations executives.<sup>11</sup>

The methodologies SSA used to establish hiring ceilings are metric-based and tied to workload indicators for each operational area. For example, OPSOS considers the volume of claims received at FOs, while OCS bases its allocations on the volume of calls received in TSCs.

## Field Office and Card Center Staffing

OPSOS uses a “workload share methodology” to determine the maximum staffing for each region. This approach considers total claims per region (claims for retirement, survivor, and disability benefits); the number of beneficiaries and recipients served; and customer contact data, such as the number of calls, appointments, and in-person visits. Staffing requirements vary across regions based on each region’s calculated “fair share” of the total workload, which is derived from workload share percentages. Consequently, regions with higher workloads receive more staffing resources. For instance, OPSOS may allocate additional personnel to regions experiencing high claim volumes or larger customer populations.<sup>12</sup>

After OPSOS establishes each region’s maximum hiring capacity, regional offices create staffing distribution plans—often preparing several different staffing scenarios to guide allocation decisions. For example, one staffing scenario could include assigning a 30 percent weight to regional workload share, representing the “fair share” amount of work, and a 70 percent weight to attrition. Another staffing scenario could include assigning equal weights of 50 percent to both attrition and workload shares. The regional commissioners decide which scenario works best for their regions after consulting with senior staff executives and area directors to assess their specific hiring needs.

After the regional commissioner selects a staffing scenario, the region uses that methodology to allocate staffing between its areas. For example, if a region receives a hiring ceiling of 100 employees and chooses a staffing scenario assigning 50 percent weight to workloads and 50 percent to attrition, the following steps would be performed:

- Step 1 – Identify each area’s total workload as a percentage of the region’s total workload (e.g., Area 1 = 40 percent, Area 2 = 60 percent).
- Step 2 – Identify each area’s attrition rate as a percentage of the region’s total attrition (e.g., Area 1 = 70 percent, Area 2 = 30 percent).
- Step 3 – Calculate the weighted average of employees for Area 1 [weighted average factoring workload (100 x 50 percent x 40 percent = 20 employees) plus weighted average factoring attrition (100 x 50 percent x 70 percent = 35 employees)].

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<sup>11</sup> As of February 2025, OPSOS and the Office of Electronic Services and Technology had merged to form the Office of Analysis, Integration, and Performance Oversight. TSCs report to the newly formed Office of Telephone Services. We completed our review prior to these changes.

<sup>12</sup> According to OPSOS, in FY 2024, staffing allocations to the Regions were based solely on workload share and not regional staffing shortfalls.

- Step 4 – Calculate the weighted average of employees for Area 2 [weighted average factoring workload (100 x 50 percent x 60 percent = 30 employees) plus weighted average factoring attrition (100 x 50 percent x 30 percent = 15 employees)].

In this scenario, the region will allocate 55 hires to Area 1 and 45 hires to Area 2. After each area receives its allocation of staff hires, the area director determines which positions to fill and the specific office locations for the new staff. The area director's decision is based on several factors, including workload demands, projected attrition, physical space to house employees, office wait times, capacity and capability to train new staff, telephone answer rates, and employee experience.

## Teleservice Center Staffing

OPSOS collaborates with OCS to determine national staffing allocations as they relate to improving 800-number service and achieving performance goals. Key considerations include TSC site performance and attrition rates, site capacity, and time zone differences that affect technician availability during peak hours. The Agency has greater flexibility in assigning staff to TSCs, as these positions are located in centralized facilities, in contrast to FO positions, which are numerous and geographically dispersed across the country.

In regions with multiple TSCs, OCS works with the regional commissioners and the TSC directors to decide where to place each new hire.<sup>13</sup> They base these decisions on each office's capacity to accommodate and train staff, local job market conditions, and retention rates. For instance, the New York region has three TSCs, and regional executives may allocate additional hires to the TSC in Puerto Rico because of its success in hiring and retaining staff as well as the facility's capacity to accommodate more staff.<sup>14</sup>

## MATTER FOR CONSIDERATION

In FY 2024, SSA's formula for allocating personnel across regional offices incorporated key workload indicators, such as the volume of claims processed, the number of beneficiaries and recipients served, and the frequency of contacts.

Although SSA has a process for allocating staff to public-facing offices, this process focuses on broad staffing distributions rather than determining the optimal number of staff at each individual location. As such, it may not account for the unique service demands of individual offices, which could result in staffing levels that do not fully reflect the specific needs of each location.

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<sup>13</sup> After we completed our audit work, SSA reorganized and moved oversight of TSCs from the regions to Headquarters. Since this change was made after we completed our fieldwork, we cannot determine what affect this will have on staffing or how SSA determines staffing for the TSCs.

<sup>14</sup> The TSC in Puerto Rico is under the New York Region.





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