

For: FSA and RMA Employees

FY 2015 Individual Development Plan (IDP) Information for Employees and Supervisors

Approved by: Associate Administrator for Operations and Management



1 Overview

A Background

All FSA and RMA permanent full-time employees are **required** to complete IDP's annually according to Department Regulation (DR) 4040-410, dated February 7, 2011, and the Agency's employee development and training handbooks. This includes:

- Presidential Management Fellows
- Senior Executive Service Candidate Development Program participants
- all non-bargaining unit employees
- any employees requesting an IDP.

OPM **requires** Agencies to assess individual training needs. In addition, collective bargaining agreements with FSA and RMA reference using IDP's. IDP's:

- are tools used to meet OPM's requirements and to assist employees and their supervisors in identifying training needs
- are methods used to develop the core competencies employees need to improve performance in their present positions
- assist employees in maintaining their current level of job proficiency
- ensure that employees are encouraged to obtain the necessary skills for future job requirements
- must be completed by **COB January 16, 2015**, for FY 2015
- shall be reviewed and approved by each employee's supervisor by **January 23, 2015**.

Disposal Date	Distribution
February 1, 2015	All FSA and RMA employees; State Offices relay to County Offices

1 Overview (Continued)

A Background (Continued)

Every new permanent full-time employee is **required** to have an IDP completed within 90 calendar days after the employee reports for duty. Employees who are newly promoted or moved to a new position shall update their IDP within 90 calendar days.

Note: Employees are **required to use AgLearn** to complete IDP's.

B Labor Management Obligations

Where contract language addresses the policies and procedures for bargaining unit employees, contract language prevails.

C Purpose

This notice:

- explains FY 2015 IDP requirements
- provides guidance for employees to complete IDP's
- provides contacts to answer questions.

D Authorities

Training guidelines are available in 6-PM for FSA and OPM regulations. Employee training **must** comply with the following:

- Agency guidelines
- DR's
- Government Employees Training Act
- OPM regulations.

E Reasonable Accommodations

Persons with disabilities, who require accommodations to complete IDP's, see contacts provided in subparagraph G.

F Deadline for Completing IDP's

All FSA and RMA permanent full-time employees are **required** to complete IDP's by **January 16, 2015**.

Notice PM-2923

1 Overview (Continued)

G Contacts

The following table provides contacts for additional information.

IF assistance is needed with...	THEN...
eAuthentication and/or password resets	do 1 of the following: <ul style="list-style-type: none"> • CLICK “Forgot your password?” on the eAuthentication Login Screen • e-mail the eAuthentication Help Desk at eAuthHelpDesk@ftc.usda.gov • if RMA employee, contact Alex Christensen at alex.christensen@rma.usda.gov.
completing IDP’s for: <ul style="list-style-type: none"> • Washington, DC, employees • Kansas City, St. Louis, and APFO employees • State and County Office employees • RMA 	contact: <ul style="list-style-type: none"> • Leadership and Employee Development Branch (LEDB) at 202-401-0374 • LEDB at 816-926-6263 • State Training Officer, AgLearn Lead • either of the following: <ul style="list-style-type: none"> • alex.christensen@rma.usda.gov • velerie.eddleman@kcc.usda.gov.

1 Overview (Continued)

H IDP Process

The IDP process consists of the following 5 steps.

Step	Action
1	Preconference planning. See Exhibit 1.
2	Employee and supervisor conference.
3	Selecting developmental activities.
4	Preparing and submitting IDP for approval in AgLearn.
5	Implementing and working toward IDP goals.

IDP procedure:

- is a cycle of planning, implementation, and evaluation between an employee and supervisor for the mutual benefit of both the employee and the Agency
- requires reviewing job requirements and making informed decisions about developmental needs.

A critical factor throughout all phases of the IDP process is interactive and effective communication between the supervisor and the employee.

Employees are encouraged to develop OPM core competencies for Federal employees or 1 of the 28 leadership core competencies. To find either of the following, go to the LEDB web site at <http://fsaintranet.dev.sc.egov.usda.gov/fsa/operations/HRD/ledb.htm>:

- a list of the core competencies, definitions, and related courses
- more information about developing IDP's and job aids.

The following AgLearn courses are available for employees and supervisors on creating IDP's. Log into AgLearn to access the following courses:

- "Guide to Completing Your Individual Development Plan"
- "AgLearn + Supervisors".

See Exhibit 1 for an optional IDP worksheet.

1 Overview (Continued)

I Experience Opportunities

Training does not always have to be a formal course. Explore options from following list for additional ways to stretch and develop competencies through experiences.

- **Work Groups**, serve on a special work group to use current skills in a new environment.
- **Teams and/or Projects**, request to join a special team, project, or assignment.
- **Focus or Sensing Groups**, join 1 of these groups of people who discuss their perceptions, opinions, beliefs, and attitudes towards a service, concept, or idea.
- **Cross-Training**, acquire knowledge and skills from coworkers who have similar grade levels and experiences. A new skill can make an employee more valuable.
- **Cross-Developmental Details**, check the USDA Detail Registry at <http://opportunities.usda.gov> for opportunities and/or consult with employee's supervisor for resources.
- **Shadowing Assignments**, ask employee's supervisor for recommendations for employee to engage in a shadow assignments that are designed to give employees exposure to program or managerial duties and responsibilities, and to show employees different approaches to handling program or managerial duties and responsibilities. Shadowing assignments also provide exposure and experience in a different unit than employee's current assignment.
- **Developmental Stretch Assignments**, allow employees to ease into program or leadership roles by exposing them to an array of roles and responsibilities. Stretch assignments are about getting employees to expand their competencies and skills to newer, wider levels. By definition, "a stretch assignment is one that requires you to take a leap beyond your comfort zone and, in the process, pick up new skills".
- **Be a Mentor and/or Find a Mentor**, the mentoring process links a less experienced employee with a more experienced employee to help facilitate professional growth. A mentor is someone not in employee's chain of command who is in a position to help with job and career issues, and who is committed to helping. For more information on mentoring contact Shirene Warner by e-mail to shirene.warner@wdc.usda.gov.
- **Be a Coach and/or Find a Coach**, coaching is a thought provoking and creative process that inspires employees to maximize their personal and professional potential. This is a method of instruction where the desired outcome is to obtain a certain level of knowledge or skills. Contact Marisol Rodriguez, of the Virtual University, for more information about coaching by e-mail to marisol.rodriguez@dm.usda.gov.

1 Overview (Continued)

I Experience Opportunities (Continued)

- **Online Training**, complete online development courses throughout the year.
- **Profession Organizations**, join professional organizations and volunteer to lead a group or serve as an officer.
- **Occupation Training**, participate in occupational training.
- **Special Emphasis Committee**, serve as a representative on a special emphasis committee.

2 Responsibilities

A Supervisor Responsibilities

All supervisors shall:

- meet with each employee to discuss their IDP **before** submitting IDP in AgLearn
- assist with IDP development by recommending goals and competencies needed for each employee's present job responsibilities
- provide feedback to each employee on performance strengths, needs, developmental activities, and guidance in completing IDP
- review and approve each employee's IDP by **January 23, 2015**.

B Employee Responsibilities

Employees shall:

- assess current skills and competencies and explore options for development
- discuss training needs for FY 2015 with their supervisor **before** submitting IDP's in AgLearn
- complete IDP's in AgLearn and submit to supervisor no later than **January 16, 2015**.

2 Responsibilities (Continued)

C Joint Responsibilities

IDP's should be reviewed, revised, and approved by the supervisor and employee as follows:

- during performance reviews
- as performance plans and/or job assignments change
- **except** for mission critical or legislatively mandated training.

Note: All training is subject to budgetary restrictions. Supervisory IDP approval is **not** a contract or guarantee of training. However, employees will be held accountable for failing to complete training approved and paid for by obligated Agency funds.

3 Action in AgLearn by Employees

A Online Training

AgLearn is USDA's Learning Management System. AgLearn has numerous online courses and books available to all USDA employees.

Notes: Employees shall search the AgLearn online catalog for free training **before** requesting similar courses with associated costs that require an external training request.

Supervisors must ensure that courses on IDP's are first available at no cost in the AgLearn catalog **before** obligating Agency funds.

3 Action in AgLearn by Employees (Continued)

B Creating IDP's in AgLearn


Note: When using AgLearn, employees shall **verify** their **e-mail address** and **supervisor's name**. On the "Home" tab, CLICK "**Your Name**" to verify current information.

Create a new IDP according to the following table.

Step	Action
1	Access AgLearn at www.aglearn.usda.gov .
2	CLICK " Login ".
3	CLICK " Login " or " Login with your LincPass (PIV) ".
4	On the "Home" tab under "Learning Status" CLICK " IDP Goals ".
5	<p>On the My Goals Workspace Screen, in the upper right corner under "Goal Links", CLICK "Create Plan".</p> <p>Employees shall have one IDP per FY in AgLearn. IDP's may be updated throughout the year. However, the employee may have more than 1 of either of the following:</p> <ul style="list-style-type: none"> • goal or competency • activity (courses, conferences, developmental assignments, on-the job-training, etc.) to achieve each goal and strengthen competencies. <p>Note: If users do not want any developmental activities, see subparagraph C.</p>
6	<p>Complete the "Create Plan" dialog box as follows:</p> <ul style="list-style-type: none"> • "Plan Type", select "Development" • "Plan Name", enter IDP, FY, and the employee's current job title <p>Example: IDP FY 2015 Loan Specialist, IDP FY 2015 Management Analyst, IDP FY 2015 Program Technician, etc.</p> <ul style="list-style-type: none"> • "Description", optional • "Plan Period", use the drop-down list and select "Fiscal Year 2015 (10/1/2014 to 9/30/2015)" <p>Note: If user is not located in e.t. zone, the dates will be different by 1 or 2 calendar days. This is acceptable.</p> <ul style="list-style-type: none"> • CLICK "Save and Add Goal".

3 Action in AgLearn by Employees (Continued)

B Creating IDP's in AgLearn (Continued)

Step	Action
7	<p>Complete the Add Goal Screen as follows:</p> <ul style="list-style-type: none"> • “Goal Name”, enter a name that explains the goal, such as, “Improve Skills in MIDAS”, “Obtain Contracting Officer Technical Representative Certification”, “Improve Processing Skills”, “Develop Leadership Skills”, etc. • “Description”, enter a narrative of what the goal will accomplish or leave blank • “Start Date”, leave blank • “Target Date”, CLICK calendar icon  and select “9/30/2015” <p>Note: This date should match the IDP expiration date.</p> <ul style="list-style-type: none"> • “Category”, optional, may use the drop-down list to select a category • “Section”, use the drop-down list to select “Long Term Goal”, “Mid Term Goal”, or “Short Term Goal” • “Status”, select “No Value”, the employee will update at a later time • “Target” and “Actual”, leave blank.
8	<p>Select online courses, classroom training, or conferences to develop and achieve the goals.</p> <p>Note: Courses, training, and conferences are defined as “Activities” in AgLearn.</p>


3 Action in AgLearn by Employees (Continued)

B Creating IDP's in AgLearn (Continued)

Step	Action						
9	<p>On the Add Goal Screen, add activities.</p> <p>Example: Online courses, external training, conferences, etc.</p> <p>Scroll down, and from the “Create New Activity” drop-down list, select “Create Activity using Learning items” (AgLearn courses) or “Create External Activity” (external training, conferences, books from Books24x7, etc.).</p> <p>Note: To research online courses and review course descriptions, return to the Home Page and use the “Search catalog” option.</p>						
	<table> <tr> <th>IF users are...</th><th>THEN, from the “Create New Activity” drop-down list, select...</th></tr> <tr> <td>searching for an AgLearn course to achieve their goal</td><td> <p>“Create Activity using Learning item”. The Learning Item Activity Search Screen will be displayed. Select the item type, enter keywords, and CLICK “Search”. The Item Search Results Screen will be redisplayed with courses found to match the keyword. CHECK (✓) “Select” the title of the desired course and CLICK “Add” and “Save”.</p> </td></tr> <tr> <td>adding an external course or a book from Books 24x7</td><td> <p>“Create External Activity”. A “Create New Activity” dialog box will be displayed. Complete as follows:</p> <ul style="list-style-type: none"> • “Activity Name”, enter name of class, conference, learning event, or book title • “Target Date”, select “9/30/2015” (this should match the IDP expiration date) • “Activity Status”, will be updated later • “Target” and “Actual”, leave blank • CLICK “Activity Notes” to type in notes about cost, travel, etc., and CLICK “Add” and CLICK “Done” • click either of the following: <ul style="list-style-type: none"> • “Save”, and repeat these steps to add more activities • “Save and Close” to return to IDP. </td></tr> </table>	IF users are...	THEN, from the “Create New Activity” drop-down list, select...	searching for an AgLearn course to achieve their goal	<p>“Create Activity using Learning item”. The Learning Item Activity Search Screen will be displayed. Select the item type, enter keywords, and CLICK “Search”. The Item Search Results Screen will be redisplayed with courses found to match the keyword. CHECK (✓) “Select” the title of the desired course and CLICK “Add” and “Save”.</p>	adding an external course or a book from Books 24x7	<p>“Create External Activity”. A “Create New Activity” dialog box will be displayed. Complete as follows:</p> <ul style="list-style-type: none"> • “Activity Name”, enter name of class, conference, learning event, or book title • “Target Date”, select “9/30/2015” (this should match the IDP expiration date) • “Activity Status”, will be updated later • “Target” and “Actual”, leave blank • CLICK “Activity Notes” to type in notes about cost, travel, etc., and CLICK “Add” and CLICK “Done” • click either of the following: <ul style="list-style-type: none"> • “Save”, and repeat these steps to add more activities • “Save and Close” to return to IDP.
IF users are...	THEN, from the “Create New Activity” drop-down list, select...						
searching for an AgLearn course to achieve their goal	<p>“Create Activity using Learning item”. The Learning Item Activity Search Screen will be displayed. Select the item type, enter keywords, and CLICK “Search”. The Item Search Results Screen will be redisplayed with courses found to match the keyword. CHECK (✓) “Select” the title of the desired course and CLICK “Add” and “Save”.</p>						
adding an external course or a book from Books 24x7	<p>“Create External Activity”. A “Create New Activity” dialog box will be displayed. Complete as follows:</p> <ul style="list-style-type: none"> • “Activity Name”, enter name of class, conference, learning event, or book title • “Target Date”, select “9/30/2015” (this should match the IDP expiration date) • “Activity Status”, will be updated later • “Target” and “Actual”, leave blank • CLICK “Activity Notes” to type in notes about cost, travel, etc., and CLICK “Add” and CLICK “Done” • click either of the following: <ul style="list-style-type: none"> • “Save”, and repeat these steps to add more activities • “Save and Close” to return to IDP. 						

3 Action in AgLearn by Employees (Continued)

B Creating IDP's in AgLearn (Continued)


Step	Action
10	<p>To add a competency to IDP, on the My Goals Workspace Screen, in the upper right corner, CLICK “Add Goal”. The Add Goal Screen will be displayed. Complete as follows:</p> <ul style="list-style-type: none"> • “Goal Name”, enter the competency name <p>Example: Team Building, Written Communication, Flexibility, etc.</p> <ul style="list-style-type: none"> • “Description”, enter a definition of the competency or leave blank • “Start Date”, leave blank • “Target Date”, CLICK calendar icon  and select “9/30/2015” (this should match IDP expiration date) • “Category”, optional, use the drop-down list to select “Agency”, “Career Development Goals”, and “Current Position Goals” • “Section”, use the drop-down list to select “Long Term Goal”, “Mid Term Goal”, or “Short Term Goal” • “Status”, select “No Value” <p>Note: This field should be updated as the employee completes activities.</p> <ul style="list-style-type: none"> • “Target” and “Actual”, leave blank • use the “Create New Activity” drop-down list to select AgLearn courses or external activities to develop and strengthen the competency.
11	<p>Review the entire IDP. CLICK “Submit for Approval” when completed. IDP has now been submitted to the employee’s supervisor to review and approve or reject. The supervisor will receive an e-mail from AgLearn to review and approve the employee’s IDP that has been submitted.</p> <p>Notes: After IDP has been submitted, the employee cannot make changes. The employee has the option of clicking “Recall Plan” to make changes and then resubmit IDP for approval.</p> <p>If employee adds AgLearn courses to IDP, the items will automatically be added to the To-Do List after IDP has been approved.</p>

2 Action in AgLearn by Employees (Continued)

C Creating IDP's in AgLearn With No Training Requested

Create IDP's with no training requested according to the following table.

Note: Employees are **required** to submit an IDP to supervisor for approval.

Step	Action
1	Follow steps 1 through 6 for “ Creating IDPs in AgLearn ” according to subparagraph B.
2	<p>Complete the Add Goal Screen as follows:</p> <ul style="list-style-type: none"> • “Goal Name”, ENTER “No Training Requested” • “Description”, explain why no training is requested <p>Example: Retirement.</p> <ul style="list-style-type: none"> • “Target Date”, CLICK calendar icon  and select “9/30/2015” (this date should match the IDP expiration date) • “Section”, use the drop-down list and select “Short Term Goal” • CLICK “Save and Close”.
3	Go to subparagraph B, step 11.

D Supervisor Rejects IDP

Follow these steps if notified by e-mail that the supervisor has rejected IDP.

Step	Action
1	Access AgLearn at www.aglearn.usda.gov .
2	CLICK “ Login ”.
3	CLICK “ Login ” or “ Login with your LincPass (PIV) ”.
4	On the Home Page , under “ Learning Status ”, CLICK “ IDP Goals ”.
5	Using the “View Plan” drop-down list, CLICK “ Rejected ” IDP. In the box on the right, CLICK “ Add/Edit Plan Notes ” to view the reason for rejection. CLICK “ Done ”.
6	Close the window and return to the My Goals Workspace Screen.
7	Click the goal name to edit the goal.
8	On the Edit Goal Screen, the employee may change the goal or edit activities, then CLICK “ Save ”.
9	Make appropriate changes to the original IDP and CLICK “ Submit for Approval ”.

3 Action in AgLearn by Supervisors

A Approving IDP's in AgLearn

Supervisors shall use the following steps to approve employee IDP's in AgLearn.

Note: Supervisors will receive an e-mail from AgLearn when an employee's IDP has been submitted for approval.

Step	Action
1	Access AgLearn at www.aglearn.usda.gov .
2	CLICK "Login" .
3	CLICK "Login" or "Login with your LincPass (PIV)" .
4	On the Home Page , CLICK "You have pending approval request" or the "Approvals" link.
5	On the Pending Reviews and Approvals Screen, under "Performance Management" , CLICK "Review" .
6	On the Supervisor Approval of Plans Page, click goal names to view the goal details and activities or CLICK "Print Plan" to view the entire IDP.
7	<p>After viewing all data contained in IDP, click either of the following:</p> <ul style="list-style-type: none"> • "Approve", to approve the employee's IDP • "Deny", to reject an employee's IDP and open the Deny Comment Screen, and CLICK "Submit". <p>Notes: Comments are required.</p> <p>Rejecting IDP's sends IDP's back to employees for the notes to be reviewed and for the necessary changes. Employees must resubmit IDP for approval.</p>
8	After IDP has been approved or denied, the supervisor will be returned to the Pending Reviews and Approvals Screen to view other IDP's.
9	IDP approval or rejection e-mail will be sent to the employee.

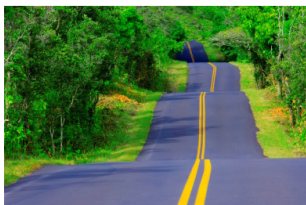
3 Action in AgLearn by Supervisors

B Running Reports

Supervisors may run IDP reports for employees according to the following steps.

Step	Action
1	On the “Home” tab, under “Easy Links”, CLICK “ Reports ”.
2	On the Reports Page, CLICK “ Plan ” and then CLICK “ My Plan ”.
3	Under “ User ”, CLICK “ Direct Subordinates ”.
4	Under “Plan Status”, use the drop-down list to select preferred option. Job aids for running reports are available on the LEDB web site at http://fsaintranet.dev.sc.egov.usda.gov/fsa/operations/HRD/ledb.htm .
5	CLICK “ Run Report ”.

Example Roadmap to Success Optional IDP Worksheet



Roadmap to Success

Optional Individual Development Plan (IDP) Worksheet

Please Reference the Competency Dictionary at:

<http://fsaintranet.dev.sc.egov.usda.gov/fsa/operations/HRD/ledb.htm>.

All IDP's are to be completed in Aglearn

Name:	Position:
	Organization:
Date Developed:	Date Discussed:
Part 1 – Where am I now?	
Greatest Strengths	
Competency	Specific Behavior(s)
Opportunities for Development	
Competency	Specific Behavior(s)

Example Roadmap to Success Optional IDP Worksheet (Continued)

Part 2 – Where do I want to be?
Short-term professional development goals (1-2 years)
Long-term professional development goals (3-5 years)

Example Roadmap to Success Optional IDP Worksheet (Continued)

Part 3 – How will I get there?

Personal Action Plan				
Competency to Develop/Enhance:				
Specific Behavior(s):				
Desired Change: <i>(Exactly what do I want to improve?)</i>		Benefits: <i>(How will improving in this area benefit me and my organization?)</i>		
Developmental Activity & Timeframe <i>(What developmental activities will support achieving desired change? When will I complete each activity?)</i>	Potential Barriers <i>(What factors might impede accomplishing the preceding activities?)</i>	Involvement of Others <i>(Which people will assist or work with me on each activity and what do I want them to do?)</i>	Measuring Progress <i>(How will I measure my progress?)</i>	Estimated Cost <i>(How much will this cost?)</i>

Example Roadmap to Success Optional IDP Worksheet (Continued)

Personal Action Plan				
Competency to Develop/Enhance:				
Specific Behavior(s):				
Desired Change: <i>(Exactly what do I want to improve?)</i>		Benefits: <i>(How will improving in this area benefit me and my organization?)</i>		
Developmental Activity & Timeframe <i>(What developmental activities will support achieving desired change? When will I complete each activity?)</i>	Potential Barriers <i>(What factors might impede accomplishing the preceding activities?)</i>	Involvement of Others <i>(Which people will assist or work with me on each activity and what do I want them to do?)</i>	Measuring Progress <i>(How will I measure my progress?)</i>	Estimated Cost <i>(How much will this cost?)</i>

Example Roadmap to Success Optional IDP Worksheet (Continued)

Personal Action Plan					
Competency to Develop/Enhance:					
Specific Behavior(s):					
Desired Change: <i>(Exactly what do I want to improve?)</i>		Benefits: <i>(How will improving in this area benefit me and my organization?)</i>			
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Example Roadmap to Success Optional IDP Worksheet (Continued)

Personal Action Plan					
Competency to Develop/Enhance:					
Specific Behavior(s):					
Desired Change: <i>(Exactly what do I want to improve?)</i>		Benefits: <i>(How will improving in this area benefit me and my organization?)</i>			
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Example Roadmap to Success Optional IDP Worksheet (Continued)

Personal Action Plan				
Competency to Develop/Enhance:				
Specific Behavior(s):				
Desired Change: <i>(Exactly what do I want to improve?)</i>		Benefits: <i>(How will improving in this area benefit me and my organization?)</i>		
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Example Roadmap to Success Optional IDP Worksheet (Continued)

Part 4 – How will I know I am moving?				
Developmental Activity & Date Completed	Actual Cost	Actual Outcome	How am I applying the learning?	Lessons Learned
Developmental Activity & Date Completed	Actual Cost	Actual Outcome	How am I applying the learning?	Lessons Learned

Example Roadmap to Success Optional IDP Worksheet (Continued)

Example Roadmap to Success Optional IDP Worksheet (Continued)

Development Commitment

Please note that all IDP's are to be completed in Aglearn.

As a FSA/RMA Professional

- Assess my knowledge and skills periodically.
- Share the results of the assessment with my immediate supervisor.
- Develop an IDP that addresses current positions as well as for advancement to future positions.
- Take full advantage of the developmental opportunities afforded.
- Complete and return all evaluation of training forms at the conclusion of all completed training.
- Share program experiences, knowledge, and lessons learned by networking with other Professionals.
- Create and execute action plans for applying learning on the job.
- Review and practice skills learned as often as possible.

As the immediate supervisor

- Participate in the identification of your developmental needs and appropriate training and/or developmental experiences.
- Serve as final approving authority for the employees IDP to ensure they meet the established guidelines.
- Assist in the process of identifying developmental activities for current and future positions, taking into account the employee's workload and performance requirements of your work unit.
- Schedule regular meetings, in addition to the quarterly check-in meetings, with the employee to discuss their development.
- Maintain ongoing coaching, focusing on the employees' current job by providing guidance and challenging work assignments to enhance developmental opportunities.
- Make workload adjustments to allow the employee to fully participate in all developmental activities.
- Utilize the employee in challenging and new developmental experiences.