

For: FSA and RMA Employees

FY 2012 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 DR 4040-410, dated February 7, 2011, and the Agency employee development and training handbooks. This includes:

- Presidential Management Fellows
- Senior Executive Service Candidate Development Program participants
- all nonbargaining unit employees
- any employee who requests 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 requirement 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
- shall be completed by **COB December 30, 2011**, for FY 2012.

Disposal Date	Distribution
October 1, 2012	All FSA and RMA employees; State Offices relay to County Offices

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1 Overview (Continued)

A Background (Continued)

Every new permanent full-time employee is **required** to have 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 2012 IDP requirements
- provides guidance for employees to complete IDP's
- provides contacts to answer questions
- obsoletes Notice PM-2828 to correct the date in subparagraph 2 A.

D Authorities

Training guidelines are available in 6-PM for FSA, 30-PM for RMA, and OPM regulations. Employee training **must** comply with the following:

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

E Reasonable Accommodations

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

F Deadline for Completing IDP's

All FSA and RMA permanent full-time employees are **required** to complete IDP's by **December 30, 2011**. If an employee is out of the office until **December 30, 2011**, the employee shall complete their IDP **immediately** on returning to the office.

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1 Overview (Continued)

G Contacts

The following 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"> • National Office 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 at 202-401-0374 • Leadership and Employee Development Branch at 816-926-6263 • State training officer, AgLearn lead • Alex Christensen at alex.christensen@rma.usda.gov.

H IDP Process

The IDP process consists of the following 5 steps.

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

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1 Overview (Continued)

H IDP Process (Continued)

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 a review of 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.

OPM has identified 28 Leadership Core Competencies. Individual leadership is the foundation for meeting program and Agency missions. To meet these missions, Agencies need skilled employees, managers, and leaders. It is the responsibility of each employee to develop proficiency in their core competencies.

Competency means a measurable pattern of knowledge, skills, abilities, behaviors, and other characteristics that an individual needs to successfully perform work roles or discharge occupational functions.

Employees may select more than 1 leadership competency for their IDP, but it is recommended to limit the number to no more than 3. Including too many dilutes the progress on any 1. If employees reach their goals before the performance year has ended, additional competencies may be added to IDP's.

28 Leadership Core Competencies		
Accountability	Flexibility	Public Service Motivation
Conflict Management	Human Capital Management	Resilience
Continual Learning	Influencing – Negotiation	Strategic Thinking
Creativity-Innovation	Integrity – Honesty	Team Building
Customer Service	Interpersonal Skills	Technical Credibility
Decisiveness	Leveraging Diversity	Technology Management
Developing Others	Oral Communication	Vision
Entrepreneurship	Partnering	Written Communication
External Awareness	Political Savvy	
Financial Management	Problem Solving	

For definitions of each competency and a guide for developing IDP's, and AgLearn courses to develop each competency, go to the Leadership and Employee Development Branch web site at www.fsa.usda.gov/FSA/hrdapp?area=home&subject=tra&topic=landing.

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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 20, 2012**.

B Employee Responsibilities

Employees shall:

- assess current skills and competencies and explore options for development
- discuss training needs for FY 2012 with their supervisor **before** submitting IDP in AgLearn
- complete IDP in AgLearn and submit to supervisor **no later than December 30, 2011**.

C Joint Responsibilities

IDP's shall be reviewed, revised, and approved by the supervisor with employee concurrence 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 all activities on their IDP that have been approved and funded.

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3 Action in AgLearn by Employees

A Online Training

AgLearn is USDA’s Learning Management System. AgLearn has over 3,000 online courses, 1,400 videos, and 18,000 books available to all USDA employees.

Note: 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 the courses on IDP’s are first available at no cost in the AgLearn catalog before obligating Agency funds.

B Creating IDP’s in AgLearn

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
- follow these steps to create a new IDP.

Step	Action
1	Access AgLearn at www.agslearn.usda.gov .
2	Under Learner Center, CLICK “Login” .
3	On the eAuthentication Warning Screen, CLICK “I Agree” , then enter user ID and password and CLICK “Login” .
4	On the “Home” tab, under “Easy Links”, CLICK “IDPs” .
5	On the My IDPs Screen, previous FY IDP’s will be displayed. At the bottom of the screen, CLICK “Create New Plan” . Employees shall have one IDP per FY in AgLearn and IDP may be updated throughout FY. However, the employee may have more than 1: <ul style="list-style-type: none">• goal or competency• activity (courses, conferences, developmental assignments, etc.) to achieve each goal and strengthen core competencies. If users do not want any training, see subparagraph D.

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3 Action in AgLearn by Employees (Continued)

B Creating IDP's in AgLearn (Continued)

Step	Action
6	<p>On the Create My Plan Screen, under “Plan Information”, complete as follows:</p> <ul style="list-style-type: none"> • “Plan Title”, enter the employee’s current job title <p>Example: Loan Specialist, Management Analyst, or Program Technician.</p> <ul style="list-style-type: none"> • “Plan Period”, CLICK “Select” and under “Date Period ID” for “FY 2012”, CLICK “Select” to indicate October 1, 2011, through September 30, 2012 <p>Note: If employee is not located in the e.t. zone, select “Fiscal Year 2012 Alternative” to obtain the correct dates.</p> <ul style="list-style-type: none"> • “Effective Date” will auto fill with, “10/1/2011” • “Expiration Date” will auto fill with, “9/30/2012” • CLICK “Add”.
7	<p>On the My Plans and Goals Screen, the current IDP is displayed. If there were incomplete goals from the previous FY, they will be displayed. The employee may choose to remove or continue to work on the goals for FY 2012.</p>
8	<p>To add goals to IDP; on the My Plans and Goals Screen, CLICK “New Goal”. On the Add Goal to Plan Screen, under “Goal Details”, complete as follows:</p> <ul style="list-style-type: none"> • “Goal Number”, leave blank, this will be system-generated • “Goal Name”, enter a name that explains the goal; such as “Obtain Contracting Officer Technical Representative Certification”, “Improve Computer Skills”, “Improve Time Management”, “Develop Leadership Skills”, “Continual Learning”, etc. • “Goal Description”, enter a narrative of what the goal will accomplish or leave blank • “Goal Category”, leave blank • “Section”, use drop-down menu to select a goal type • “Priority”, leave blank • “Target Date”, CLICK “calendar icon”  and select “9/30/2012” • “Target Value” and “Stretch Value”, leave blank • CLICK “Save and Add Another”, if applicable, or “Finished” when all goals have been added; the My Goals and Plans Screen will be displayed.

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3 Action in AgLearn by Employees (Continued)

B Creating IDP's in AgLearn (Continued)

Step	Action
9	<p>Next, users will 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>
10	<p>On the My Plans and Goals Screen, the employee will add activities.</p> <p>Example: Online courses, external training, and conferences.</p> <p>Activities may be added as follows:</p> <ul style="list-style-type: none"> • in front of the “Goal”, CLICK “+” to expand the field • CLICK “Add Activity” and CLICK “Search for Activity” (AgLearn courses) or “Create New Activity” (external training or conferences).
IF users are...	THEN CLICK...
<p>searching for an AgLearn course to achieve their goal</p>	<p>“Search for Activity”, and the Add Activity Screen will be displayed; under “Learning Item Activity Search”, type in keywords and CLICK “Search” for online courses, the Add Activity Screen will be redisplayed with courses found to match the keyword. CHECK (✓) “Select” for the title of the desired course, and CLICK “Add”.</p> <p>Note: When searching for free online courses, CHECK (✓) the box next to “online”. To view details about the course, click the course title.</p>
<p>adding an external course or a book from Books24x7</p>	<p>“Create New Activity”, and the “Add Activity” dialog box will be displayed; enter the following:</p> <ul style="list-style-type: none"> • “Activity Name”, name of class, conference, learning event, or book title • “Target Date” will auto-fill with, “9/30/2012” • “Priority”, “Target Value”, and “Stretch Value”, leave blank • CLICK “Add”, the dialog box will close • CLICK “View/Add Notes” for the activity and list the cost • CLICK “Add” and CLICK “←Back”.

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3 Action in AgLearn by Employees (Continued)

B Creating IDP's in AgLearn (Continued)

Step	Action
11	<p>To add a Leadership Core Competency to IDP's, on the My Plans and Goals Screen, CLICK "New Goal", and on the Add Goal to Plan Screen, under "Goal Details", complete as follows:</p> <ul style="list-style-type: none"> • "Goal Number", leave blank, this will be system generated • "Goal Name", enter the competency name; for example, Team Building, Written Communication, Flexibility, etc. • "Goal Description", enter a definition of the competency or leave blank • "Goal Category", leave blank • "section", leave blank • "Priority, use the drop-down menu to select "high", "low", or "medium" • "Target Date", CLICK "calendar icon"  and select "9/30/2012" • "Target Value" and "Stretch Value", leave blank • CLICK "Save and Add Another", if applicable, or "Finished" when all competencies have been added; the My Goals and Plans Screen will be displayed. <p>Note: This will return the employee to IDP. The next step is to add activities to develop and strengthen the competency.</p>
12	<p>To add a competency-related online course, or external activity, see steps 10-14. A list of suggested AgLearn courses, with description and course duration supporting each competency, can be found on the Leadership and Employee Development Branch web site at www.fsa.usda.gov/FSA/hrdapp?area=home&subject=tra&topic=landing.</p>
13	<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. Employee and supervisor will receive an e-mail from AgLearn to verify the employee's IDP has been submitted.</p> <p>Notes: After IDP has been submitted, changes should not be made until IDP has been returned to the employee. The supervisor will not be able to approve changes made by the employee while IDP is in "submitted/pending" status.</p> <p>If employee adds AgLearn courses to IDP, the item will automatically be added to their To-Do List after IDP has been approved.</p>

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3 Action in AgLearn by Employees (Continued)

C Supervisor Rejected IDP's

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

Step	Action
1	Access AgLearn at www.aglearn.usda.gov .
2	Under Learner Center, CLICK " Login ".
3	On the eAuthentication Warning Screen, CLICK " I Agree ", then enter user ID and password and CLICK " Login ".
4	On the Home Page, under "Easy Links", CLICK " IDPs ".
5	Locate the " Rejected " IDP and CLICK " View Notes " to see reason for rejection.
6	CLICK " ← Back " to return to the My IDPs Screen.
7	CLICK " View Plan " to open the rejected plan.
8	Make the appropriate change and CLICK " Submit for Approval ".

D Creating IDP's in AgLearn With No Training Requested

Follow these steps to create IDP's with no training requested.

Step	Action
1	Follow steps 1 through 7 for " Create a New Plan " under subparagraph B.
2	On the Add Goal to Plan Screen, under "Goal Details", complete as follows: <ul style="list-style-type: none"> • "Goal Number", leave blank, a number will be system-generated • "Goal Name", ENTER "No Training Requested" • "Goal Description", explain why no training is requested Example: Retirement. • "Goal Category", "Section", and "Priority", leave blank • "Target Date", CLICK " and select "9/30/2012" • "Target Value" and "Stretch Value", leave blank • CLICK "Finished", the My Goals and Plans Screen will be displayed.
3	Go to subparagraph B, step 13.

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4 Action in AgLearn by Supervisors

A Approving IDP's in AgLearn

Supervisors shall follow these steps to approve employee IDP's in AgLearn.

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

Step	Action
1	Access AgLearn at www.aglearn.usda.gov .
2	Under "Learner Center", CLICK " Login ".
3	On the eAuthentication Warning Screen, CLICK " I Agree ", enter user ID and password, and CLICK " Login ".
4	On the Home Page, CLICK " You have pending approval request ". Note: To approve IDP's, do not use the My Employees/ Subordinates Menu to access employee IDP's; supervisors must use the "Approvals" links.
5	On the Pending Reviews and Approvals Screen, under "Performance Management", CLICK " Review ".
6	The employee's name will be displayed at the top of the page on the My Plans and Goals Screen. CLICK "+" to view the goals and activities.
7	After viewing all data in IDP, click either of the following: <ul style="list-style-type: none"> • "Approve", approves the employee's IDP • "Reject", rejects an employee's IDP and opens the Plan Review Notes Screen for comments (comments are required); scroll to the right and CLICK "Reject" to confirm and the employee's IDP will be redisplayed. <p>Notes: IDP has been returned to the employee. Do not click "Submit/Pending".</p> <p>Rejecting IDP sends it back to the employee so he/she can review the notes, make the necessary changes, and submit IDP for approval.</p>
8	After IDP has been approved or rejected, CLICK " Your Home Page ". Note: If the supervisor has more IDP's to approve, CLICK " You have pending approval request " on the Home Page.
9	IDP approval or reject e-mail will be sent to the employee.

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4 Action in AgLearn by Supervisors (Continued)

B Running Reports

Supervisors may run IDP reports according to the following table.

Step	Action
1	On the “Home” tab, under “Easy Links”, CLICK “ Reports ”.
2	On the Reports Page, CLICK “ My IDP ”.
3	Under “User”, CLICK “ Direct Subordinates ”.
4	Under “Plan Status”, use the drop-down menu to select “ Active/Approved ”.
5	CLICK “ Run Report ”.