

For: FFAS Employees

**FY 2014 Individual Development Plan (IDP) Information for Employees and Supervisors**

**Approved by:** Associate Administrator for Operations and Management



**1 Overview**

**A Background**

All FFAS permanent full-time employees are **required** to complete IDP's annually according to 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 FAS, 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 December 13, 2013**, for FY 2014
- shall be reviewed and approved by each employee's supervisor by **December 20, 2013**.

**Note:** Because of the FY 2014 Federal furlough, the IDP completion deadline has been extended from October 31, 2013 to December 13, 2013.

<b>Disposal Date</b>	<b>Distribution</b>
April 1, 2014	All FAS, FSA, and RMA employees; State Offices relay to County Offices

## Notice PM-2897

### 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 2014 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
- Department Regulations (DR's)
- Government Employees Training Act
- OPM regulations.

**Note:** 6-PM information about IDP's will be updated by April 20, 2014.

#### E Reasonable Accommodations

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

**1 Overview (Continued)**

**F Deadline for Completing IDP's**

All FFAS permanent full-time employees are **required** to complete IDP's by **December 13, 2013**. Employees who are out of the office until **December 13, 2013**, must complete their IDP immediately upon returning to the office.

**G Contacts**

The following table provides contacts for additional information.

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

1 Overview (Continued)

H IDP Process

The IDP process consists of the following 5 steps.

Step	Action
1	Pre-conference planning
2	Employee/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 a list of the competencies, definitions, and related courses, go to the LEDB web site at <http://fsaintranet.dev.sc.egov.usda.gov/fsa/operations/HRD/ledb.htm>.

For more information about developing IDP's and job aids, go to the LEDB web site.

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.

## 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 **December 20, 2013**.

### B Employee Responsibilities

Employees shall:

- assess current skills and competencies and explore options for development
- discuss training needs for FY 2014 with their supervisor **before** submitting IDP's in AgLearn
- complete IDP's in AgLearn and submit to supervisor no later than **December 13, 2013**.

### 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.

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

**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 <b>www.aglearn.usda.gov</b> .
2	CLICK “ <b>Login</b> ”.
3	On the eAuthentication Warning Screen, CLICK “ <b>I Agree</b> ,” enter user ID and password, and CLICK “ <b>Login</b> ” or “ <b>Login with your LincPass (PIV)</b> ”.
4	On the “Home” tab under “Learning Status” CLICK “ <b>IDP Goals</b> ”.
5	<p>On the My Goals Workspace Screen, in the upper right corner, CLICK “<b>Create Plan</b>”.</p> <p>Employees shall have one IDP per <b>FY</b> 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"> <li>• goal or competency</li> <li>• activity (courses, conferences, developmental assignments, on the job training, (etc.) to achieve each goal and strengthen competencies</li> </ul> <p><b>Note:</b> If users do <b>not</b> want any developmental activities, see subparagraph C.</p>

3 Action in AgLearn by Employees (Continued)

B Creating IDP's in AgLearn (Continued)

Step	Action
6	<p>Complete the “<b>Create Plan</b>” dialog box as follows:</p> <ul style="list-style-type: none"> <li>• “Plan Type,” select “<b>Development</b>”</li> <li>• “Plan Name,” enter the employee’s current job title and FY</li> </ul> <p><b>Example:</b> Loan Specialist FY 2014, Management Analyst FY 2014, Program Technician FY 2014, etc.</p> <ul style="list-style-type: none"> <li>• “Description,” optional</li> <li>• “Plan Period,” use the drop-down list and select “<b>Fiscal Year 2014 (10/1/2013 to 9/30/2014)</b>”</li> </ul> <p><b>Note:</b> If user is <b>not</b> 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"> <li>• <b>CLICK “Save and Add Goal”.</b></li> </ul>
7	<p>Complete the Add Goal Screen as follows:</p> <ul style="list-style-type: none"> <li>• “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.</li> <li>• “Description,” enter a narrative of what the goal will accomplish or leave blank</li> <li>• “Start Date,” leave blank</li> <li>• “Target Date,” <b>CLICK</b> the calendar icon  and select “<b>9/30/2014</b>”</li> </ul> <p><b>Note:</b> This date should match the expiration date of IDP.</p> <ul style="list-style-type: none"> <li>• “Category,” optional, may use the drop-down list to select a category</li> <li>• “Section,” use the drop-down list to select “Long Term Goal,” “Mid Term Goal,” or “Short Term Goal”</li> <li>• “Status,” select “<b>No Value</b>”, the employee will update at a later time</li> <li>• “Target” and “Actual”, leave blank.</li> </ul>

3 Action in AgLearn by Employees (Continued)

B Creating IDP's in AgLearn (Continued)

Step	Action				
8	<p>Select online courses, classroom training, or conferences to develop and achieve the goals.</p> <p><b>Note:</b> Courses, training, and conferences are defined as “Activities” in AgLearn.</p>				
9	<p>On the Add Goal Screen, add activities.</p> <p><b>Example:</b> Online courses, external training, conferences, etc.</p> <p>Scroll down, and from the “Create New Activity” drop-down list, select “<b>Create Activity using Learning items</b>” (AgLearn courses) or “<b>Create External Activity</b>” (external training, conferences, books from Books24x7, etc.).</p> <p><b>Note:</b> To research online courses and review course descriptions, return to the Home Page and use the “Search catalog” option.</p> <table border="1" data-bbox="407 869 1487 1163"> <thead> <tr> <th data-bbox="407 869 678 940">IF users are...</th> <th data-bbox="678 869 1487 940">THEN, from the “Create New Activity” drop-down list, select...</th> </tr> </thead> <tbody> <tr> <td data-bbox="407 940 678 1163">searching for an AgLearn course to achieve their goal</td> <td data-bbox="678 940 1487 1163">“<b>Create Activity using Learning item</b>”. The Learning Item Activity Search Screen will be displayed. Select the item type, insert keywords, and CLICK “<b>Search</b>” for online courses. The Item Search Results will be redisplayed with courses found to match the keyword. CHECK (<input type="checkbox"/> “<b>Select</b>” the title of the desired course and CLICK “<b>Add</b>” and “<b>Save</b>”.</td> </tr> </tbody> </table>	IF users are...	THEN, from the “Create New Activity” drop-down list, select...	searching for an AgLearn course to achieve their goal	“ <b>Create Activity using Learning item</b> ”. The Learning Item Activity Search Screen will be displayed. Select the item type, insert keywords, and CLICK “ <b>Search</b> ” for online courses. The Item Search Results will be redisplayed with courses found to match the keyword. CHECK ( <input type="checkbox"/> “ <b>Select</b> ” the title of the desired course and CLICK “ <b>Add</b> ” and “ <b>Save</b> ”.
IF users are...	THEN, from the “Create New Activity” drop-down list, select...				
searching for an AgLearn course to achieve their goal	“ <b>Create Activity using Learning item</b> ”. The Learning Item Activity Search Screen will be displayed. Select the item type, insert keywords, and CLICK “ <b>Search</b> ” for online courses. The Item Search Results will be redisplayed with courses found to match the keyword. CHECK ( <input type="checkbox"/> “ <b>Select</b> ” the title of the desired course and CLICK “ <b>Add</b> ” and “ <b>Save</b> ”.				
	<p>adding an external course or a book from Books 24x7</p> <p>“<b>Create External Activity</b>”. A “Create New Activity” dialog box will be displayed. Complete as follows:</p> <ul style="list-style-type: none"> <li>• “Activity Name,” enter name of class, conference, learning event, or book title</li> <li>• “Target Date,” select “<b>9/30/2014</b>” (this should match the expiration date of the plan)</li> <li>• “Activity Status,” will be updated later</li> <li>• “Target” and “Actual,” leave blank</li> <li>• CLICK “<b>Activity Notes</b>” to type in notes about cost, travel, etc., and CLICK “<b>Add</b>” and CLICK “<b>Done</b>”</li> <li>• click either of the following:             <ul style="list-style-type: none"> <li>• “<b>Save</b>,” and repeat these steps to add more activities</li> <li>• “<b>Save and Close</b>” to return to IDP.</li> </ul> </li> </ul>				

3 Action in AgLearn by Employees (Continued)

B Creating IDP's in AgLearn (Continued)

Step	Action
10	<p>To add a “<b>Competency</b>” to IDP, on the My Goals Workspace Screen, in the upper right corner, CLICK “<b>Add Goal</b>”. The Add Goal Screen will be displayed. Complete as follows:</p> <ul style="list-style-type: none"> <li>• “Goal Name,” enter the competency name</li> </ul> <p><b>Example:</b> Team Building, Written Communication, Flexibility, etc.</p> <ul style="list-style-type: none"> <li>• “Description,” enter a definition of the competency or leave blank</li> <li>• “Start Date,” leave blank</li> <li>• “Target Date,” CLICK the calendar icon  and select “<b>9/30/2014</b>” (this should match IDP expiration date)</li> <li>• “Category,” optional, use the drop-down list to select “Agency,” “Career Development Goals,” and “Current Position Goals”</li> <li>• “Section,” use the drop-down list to select “Long Term Goal,” “Mid Term Goal, or “Short Term Goal”</li> <li>• “Status”, select “<b>No Value</b>”</li> </ul> <p><b>Note:</b> This field should be updated as the employee completes the activities.</p> <ul style="list-style-type: none"> <li>• “Target” and “Actual,” leave blank</li> <li>• use the “Create New Activity” drop-down list to select AgLearn courses or external activities to develop and strengthen the competency.</li> </ul>
11	<p>Review the entire IDP. CLICK “<b>Submit for Approval</b>” when completed. IDP has now been submitted to the employee’s supervisor to review, 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><b>Notes:</b> After IDP has been submitted, the employee <b>cannot</b> make changes. The employee has the option of clicking “<b>Recall Plan</b>” 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>

1 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. The declination item in the catalog will **not** be accepted.

Step	Action
1	Follow steps 1 through 6 for “ <b>Creating IDPs in AgLearn</b> ” according to subparagraph B.
2	<p>Complete the Add Goal Screen as follows:</p> <ul style="list-style-type: none"> <li>• “Goal Name”, ENTER “<b>No Training Requested</b>”</li> <li>• “Description”, explain why no training is requested</li> </ul> <p><b>Example:</b> Retirement.</p> <ul style="list-style-type: none"> <li>• “Target Date”, CLICK the calendar icon  and select “<b>9/30/2014</b>” (this date should match the expiration date of IDP)</li> <li>• “Section,” use the drop-down list and select “<b>Short Term Goal</b>”</li> <li>• CLICK “<b>Save and Close</b>”.</li> </ul>
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 <a href="http://www.aglearn.usda.gov">www.aglearn.usda.gov</a> .
2	CLICK “ <b>Login.</b> ”
3	On the eAuthentication Warning Screen, CLICK “ <b>I Agree</b> ”, enter user ID and password, and CLICK “ <b>Login</b> ” or “ <b>Login with my LincPass</b> ”.
4	On the <b>Home Page</b> , under “ <b>Learner Status</b> ”, CLICK “ <b>IDP Goals</b> ”.
5	Using the “View Plan” drop-down list, CLICK “ <b>Rejected</b> ” IDP. In the box on the right, CLICK “ <b>Add/Edit Plan Notes</b> ” to view the reason for rejection. CLICK “ <b>Done</b> ”.
6	Close the window and return to the <b>My Goals Workspace</b> Screen.
7	Click the goal name to edit the goal.
8	On the <b>Edit Goal</b> Screen, the employee may change the goal or edit activities, then CLICK “ <b>Save</b> ”.
9	Make appropriate changes to the original IDP and CLICK “ <b>Submit for Approval</b> ”.

**4 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 <a href="http://www.aglearn.usda.gov">www.aglearn.usda.gov</a> .
2	CLICK “ <b>Login</b> ”.
3	On the eAuthentication Warning Screen, CLICK “ <b>I Agree</b> ”, enter user ID and password, and CLICK “ <b>Login</b> ” or “ <b>Login with my LincPass</b> ”.
4	On the <b>Home Page</b> , CLICK “ <b>You have pending approval request</b> ” or the “ <b>Approvals</b> ” link.
5	On the Pending Reviews and Approvals Screen, under “ <b>Performance Management</b> ”, CLICK “ <b>Review</b> ”.
6	On the Supervisor Approval of Plans Page, click goal names to view the goal details and activities.
7	After viewing all data contained in IDP, click either of the following: <ul style="list-style-type: none"> <li>• “<b>Approve</b>”, to approve the employee’s IDP</li> <li>• “<b>Deny</b>”, to reject an employee’s IDP and open the Deny Comment Screen, and CLICK “<b>Submit</b>”.</li> </ul> <p><b>Notes:</b> Comments are <b>required</b>.</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.

**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 “ <b>Reports</b> ”.
2	On the Reports Page, CLICK “ <b>Plan</b> ” and then CLICK “ <b>My Plan</b> ”.
3	Under “ <b>User</b> ,” CLICK “ <b>Direct Subordinates</b> ”.
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 <a href="http://fsaintranet.dev.sc.egov.usda.gov/fsa/operations/HRD/ledb.htm">http://fsaintranet.dev.sc.egov.usda.gov/fsa/operations/HRD/ledb.htm</a> .
5	CLICK “ <b>Run Report</b> ”.