

For: FSA and RMA Employees

**FY 2011 Individual Development Plan (IDP) Information for Employees and Supervisors**

Approved by: Deputy Administrator, 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
- SES Candidate Development Program participants
- all non-bargaining unit employees
- any employee who requests 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 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 **June 17, 2011**, for FY 2011.

<b>Disposal Date</b>	<b>Distribution</b>
October 1, 2011	All FSA and RMA employees; State Offices relay to County Offices

## Notice PM-2795

### 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 2011 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, 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 **June 17, 2011**. If an employee is out of the office until **June 17, 2011**, the employee shall complete their IDP **immediately** upon returning to the office.

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**1 Overview (Continued)**

**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>• <b>CLICK “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>• National Office employees</li> <li>• Kansas City, St. Louis and APFO employees</li> <li>• State and County Office employees</li> </ul>	contact: <ul style="list-style-type: none"> <li>• Leadership and Employee Development Branch at 202-401-0374</li> <li>• Leadership and Employee Development Branch at 816-926-6263</li> <li>• State Training Officer, AgLearn Lead.</li> </ul>

**H IDP Process**

The IDP process consists of 5 steps, as follows.

<b>Step</b>	<b>Action</b>
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 towards IDP goals.

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

For definitions of each competency and a guide for developing IDP's, access the Leadership and Employee Development Branch web site located at [www.fsa.usda.gov/FSA/hrdapp?area=home&subject=tra&topic=landing](http://www.fsa.usda.gov/FSA/hrdapp?area=home&subject=tra&topic=landing).

## 2 Responsibilities

### A Supervisor Responsibilities

All supervisors shall:

- meet with each employee to discuss their IDP **before** submitting the 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 employees IDP by **June 30, 2011**.

### B Employee Responsibilities

Employees shall:

- assess current skills and competencies and explore options for development
- discuss training needs for FY 2011 with their supervisor **before** submitting IDP in AgLearn
- complete IDP in AgLearn and submit to supervisor **no later than June 17, 2011**.

### C Joint Responsibilities

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

- during performance reviews
- as performance plans and/or job assignments change.

**Note:** All training is subject to budgetary restrictions. Supervisory IDP approval is **not** a contract or guarantee of training.

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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.

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 <b>www.aglearn.usda.gov</b> .
2	Under Learner Center, <b>CLICK</b> “ <b>Learner Login</b> ”.
3	On the eAuthentication Warning Screen, <b>CLICK</b> “ <b>I Agree</b> ”, then enter user ID and password, and <b>CLICK</b> “ <b>Login</b> ”.
4	On the “Home” tab, under “Easy Links”, <b>CLICK</b> “ <b>IDPs</b> ”.
5	On the My IDPs Screen, the previous years’ plans will be displayed. At the bottom of the screen, <b>CLICK</b> “ <b>Create New Plan</b> ”.  Employees shall have one IDP per FY in AgLearn and the IDP may be updated throughout the year within the plan. However, the employee may have more than one: <ul style="list-style-type: none"><li>• goal or competency</li><li>• activity (courses, conferences, developmental assignments, etc.) to achieve each goal and strengthen core competencies.</li></ul> If users do <b>not</b> 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"> <li>• “Plan Title”, enter the employee’s current job title</li> </ul> <p><b>Example:</b> Loan Specialist, Management Analyst, or Program Technician.</p> <ul style="list-style-type: none"> <li>• “Plan Period”, CLICK “<b>Select</b>” and under “Date Period ID” for “FY 2011”, CLICK “<b>Select</b>” to indicate October 1, 2010, through September 30, 2011</li> <li>• “Effective Date” will auto fill with 10/1/2010</li> <li>• “Expiration Date” will auto fill with 9/30/2011</li> <li>• CLICK “<b>Add</b>”.</li> </ul>
7	<p>On the My Plans and Goals Screen, the current IDP is displayed. If there were incomplete goals from the previous year, they will be displayed. The employee may choose to remove or continue to work on the goals for FY 2011.</p>
8	<p>To add goals to the IDP; on the My Plans and Goals Screen, CLICK “<b>New Goal</b>”. On the Add Goal to Plan Screen, under “Goal Details” complete as follows:</p> <ul style="list-style-type: none"> <li>• “Goal Number”, leave blank, this will be system-generated</li> <li>• “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.</li> <li>• “Goal Description”, enter a narrative of what the goal will accomplish or you may leave it blank</li> <li>• “Goal Category”, leave blank</li> <li>• “Section”, use drop-down menu to select a goal type</li> <li>• “Priority”, leave blank</li> <li>• “Target Date”, CLICK the calendar icon “” and select “9/30/2011”</li> <li>• “Target Value” and “Stretch Value”, leave blank</li> <li>• CLICK “<b>Save and Add Another</b>”, if applicable, or “<b>Finished</b>” when all goals have been added; the My Goals and Plans Screen will be displayed.</li> </ul>

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><b>Note:</b> 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><b>Example:</b> Online courses, external training, and conferences.</p> <p>Activities may be added as follows:</p> <ul style="list-style-type: none"> <li>• CLICK “+” in front of the “Goal” to expand the field</li> <li>• CLICK “Add Activity” and CLICK “Search for Activity” (AgLearn courses) or “Create New Activity” (external training or conferences).</li> </ul>						
	<table border="1"> <thead> <tr> <th data-bbox="394 877 678 919">IF users are...</th> <th data-bbox="678 877 1474 919">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="394 919 678 1283">                     searching for an AgLearn course to achieve their goal                 </td> <td data-bbox="678 919 1474 1283">                     CLICK “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” the title of the desired course, and CLICK “Add”.   <b>Note:</b> When searching for free online courses check the box next to “online”. To view details about the course, click on the course title.                 </td> </tr> <tr> <td data-bbox="394 1283 678 1919">                     adding an external course or a book from Books24x7                 </td> <td data-bbox="678 1283 1474 1919">                     CLICK “Create New Activity”, and the “Add Activity” dialog box will be displayed; enter the following:                     <ul style="list-style-type: none"> <li>• “Activity Name”, name of class, conference, learning event, or book title</li> <li>• “Target Date” will auto-fill with 9/30/2011</li> <li>• “Priority”, “Target Value”, and “Stretch Value”, leave blank</li> <li>• CLICK “Add”, the dialog box will close</li> <li>• CLICK “View/Add Notes” for the activity and list the cost</li> <li>• CLICK “Add” and CLICK “←Back”.</li> </ul> </td> </tr> </tbody> </table>	IF users are...	THEN...	searching for an AgLearn course to achieve their goal	CLICK “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” the title of the desired course, and CLICK “Add”.  <b>Note:</b> When searching for free online courses check the box next to “online”. To view details about the course, click on the course title.	adding an external course or a book from Books24x7	CLICK “Create New Activity”, and the “Add Activity” dialog box will be displayed; enter the following: <ul style="list-style-type: none"> <li>• “Activity Name”, name of class, conference, learning event, or book title</li> <li>• “Target Date” will auto-fill with 9/30/2011</li> <li>• “Priority”, “Target Value”, and “Stretch Value”, leave blank</li> <li>• CLICK “Add”, the dialog box will close</li> <li>• CLICK “View/Add Notes” for the activity and list the cost</li> <li>• CLICK “Add” and CLICK “←Back”.</li> </ul>
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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 complete as follows:</p> <ul style="list-style-type: none"> <li>• scroll to and <b>CLICK “New Goal”</b> on the Add Goal to Plan Screen, then scroll to and <b>CLICK “Goal Wizard”</b></li> <li>• under “Choose Goal Type”, <b>CLICK “Add Competency Related Goals”</b> and <b>CLICK “Next”</b></li> <li>• on the Goal Wizard - Search Competencies Page, <b>CLICK “Show Competencies associated with Competency Profile”</b> and <b>CLICK “Select”</b></li> <li>• on the “Competency Profiles” dialog box that will be displayed, under “<b>Competency Profile ID</b>”, <b>ENTER “FSA”</b> or “<b>RMA</b>” and <b>CLICK “Search”</b></li> <li>• select “<b>FSA Leadership Competencies</b>” or “<b>RMA Leadership Competencies</b>”, the dialog box will close and the Goal Wizard Competency Page will be displayed; <b>CLICK “Next”</b></li> <li>• the 28 Leadership Core Competencies will be displayed, <b>CHECK (✓)</b> the box next to the desired competencies to develop, and <b>CLICK “Next”</b>; it is recommended to select no more than 3 competencies</li> <li>• under “<b>Target Date</b>”, use the calendar icon “” to select “<b>9/30/2011</b>” as the target date for <b>each</b> competency listed</li> <li>• use the “<b>Plan Selection ID</b>” drop-down menu to select a goal type for each competency and <b>CLICK “Finished”</b>.</li> </ul> <p><b>Note:</b> This will return the employee to the IDP. The next step is to add activities to develop and strengthen the competency.</p>

3 Action in AgLearn by Employees (Continued)

B Creating IDP's in AgLearn (Continued)

Step	Action
12	<p>To add a competency-related online course:</p> <ul style="list-style-type: none"> <li>• CLICK “+” in front of the “Competency” to expand the field</li> <li>• CLICK “Add Activity” then “Search for Activity”, the competency will already be entered in the search field.</li> </ul> <p><b>Note:</b> A list of AgLearn courses supporting the competency will be listed. CHECK (✓) “Select” the title of the desired course, and CLICK “Add”.</p>
13	<p>To add an external course, CLICK “Add Activity” then “Create New Activity”. The “Add Activity” dialog box will be displayed. Enter the following:</p> <ul style="list-style-type: none"> <li>• “Activity Name”, name of class, conference, learning event, or book title</li> <li>• “Target Date”, will auto-fill with 9/30/2011</li> <li>• “Priority”, “Target Value”, “Stretch Value”, leave blank</li> <li>• CLICK “Add”, and the dialog box will close</li> <li>• CLICK “View/Add Notes” for the activity and list the cost</li> <li>• CLICK “Add” and CLICK “←Back”.</li> </ul>
14	<p>Review the entire IDP. CLICK “Submit for Approval” when completed. The 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><b>Notes:</b> Once the IDP has been submitted, changes <b>should not</b> be made until the IDP has been returned to the employee. The supervisor will not be able to approve changes made by the employee while the IDP is in submit/pending status.</p> <p>If employee adds AgLearn courses to the IDP, the item will automatically be added to their To-Do List after the IDP has been approved.</p>

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

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 " <b>Create a New Plan</b> " under subparagraph B.
2	On the Add Goal to Plan Screen, under "Goal Details", complete as follows: <ul style="list-style-type: none"> <li>• "Goal Number", leave blank, a number will be system-generated</li> <li>• "Goal Name", ENTER "<b>No Training Requested</b>"</li> <li>• "Goal Description", explain why no training is requested <b>Example:</b> Retirement</li> <li>• "Goal Category", "Section", and "Priority", leave blank</li> <li>• "Target Date", CLICK "" and select "9/30/2011"</li> <li>• "Target Value" and "Stretch Value", leave blank</li> <li>• CLICK "<b>Finished</b>", the My Goals and Plans Screen will be displayed.</li> </ul>
3	Go to subparagraph B, step 14.

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

**4 Action in AgLearn by Supervisors (Continued)**

**B Running Reports**

Supervisors may run IDP reports according to the following table.

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