

Title 330 - General Manual

Part 404 - Directing

404.0 - Introduction

Directing is using available resources to accomplish priority objectives established during the planning process. Effective and efficient accomplishments of the objectives will result when proper attention is given to directing as a management function.

Directing includes the following:

- Training
- Direct staff assistance
- Scheduling
- Servicing
- Follow-up
- Performance appraisals

404.1 - Training

Introduction

Training is an integral part of directing to ensure that employees have the abilities, skills, and knowledge necessary to carry out their duties and responsibilities for implementing plan of operations. Individual development plans should maximize the training opportunity for the tasks to be performed and to increase the production capabilities of employees in meeting objectives. All employees have the responsibility of improving their skills through self development.

Policy

NRCS policy on training is described in GM-360-410.

404.2 - Direct Staff Assistance

Introduction

An important part of directing NRCS operations involves assistance within and between different levels of the organization. Staff assistance may include two or more employees working together to solve a problem. Staff assistance includes giving technical guidance and/or providing training to another employee. This on-the-job assistance may result in accomplishment of a task. The employee giving staff assistance should provide guidance and/or interpretation of NRCS procedures to ensure that policy is followed.

WA404-1

Title 330 - General Manual

Part 404 - Directing

Policy

The deputy chiefs, NTC directors, state conservationists, and the Director of the Caribbean Area will develop and maintain a policy on providing direct staff assistance in their respective areas of responsibilities.

WA404.2 Direct Staff Assistance

Policy. Requests for assistance, both technical and support assistance, will be made through the District Conservationist, Area Conservationists and State Office Staff Leaders. When appropriate, assistance may be obtained from external sources. Accomplishing the business plan will be first priority for all assistance requests.

(a) All employees are authorized to request assistance within the state organization through the appropriate District Conservationist. The first consideration for obtaining assistance must be from within the multi-county team and Area.

(b) Area Conservationists will be available to assist with requests between areas and state office.

(c) Requests for assistance will be made as soon as the need is known with as much advance notice as possible.

(d) Requests for assistance outside of the state organization will be approved by the State Conservationist.

404.3 - Scheduling

Introduction

Scheduling is a vital component of directing and is applicable to all employees. It is planning work within a specified time frame to implement plan of operations, make effective use of resources, and meet work commitments. Coordination is needed among staff members in developing schedules. Effective scheduling will eliminate wasted time, trips, and travel and will also assure the maximum amount of production on the highest priority work. Effective scheduling also means knowing what the priority commitments are and planning a full day's work for each day.

WA404-2

Title 330 - General Manual

Part 404 - Directing

Policy

The deputy chiefs, NTC directors, state conservationists, and the Director of the Caribbean Area will determine scheduling and time documentation procedures in their respective areas of responsibility.

As a minimum, the policy must provide documentation of both scheduled activities and those actually carried out. This documentation of each employee's time is required to support the AD-320 Time and Attendance Report, the plan of operations, and offset time charges. Documentation may be in the form of pen-and-ink changes on the schedule or by some other means such as a daily diary.

Guidelines

The following forms, aids, and techniques are available to assist NRCS employees in scheduling:

- Regular staff meetings. Staff meetings held on a regular basis help coordinate activities and finalize schedules of all NRCS and non-NRCS personnel working in an office
- SCS-MGT 254, Weekly Schedule. This two-part form provides copies for the employee and the supervisor
- OF-67, Activity Schedule. This form can be used to record those activities that can be scheduled weeks or months ahead and to set aside periods of time for priority work commitments
- SCS-MGT-165, Monthly Schedule. This wall calendar size form can be used to note the schedules of all office members for several weeks and provides a means to coordinate individual schedules. It enables office members to know where the others are working
- SCS-MGT 195, Work Commitment. This form can be used to record commitments by community, watershed, or time frame
- Other aids include pocket calendars, card files, work commitments cards, and chalkboards
- The Field Office Communication and Automation System (FOCAS) when installed can be used to record, monitor, and recall work commitments to aid in scheduling work in a timely and effective manner.

WA404-3

Title 330 - General Manual

Part 404 - Directing

WA404.3 Scheduling

Policy

Business Plans and Workload Analysis should drive individual schedules. The supervisor sets workload priorities throughout the year and clearly communicates these priorities to the staff. Supervisors should provide specific and detailed assignments to individual employees as appropriate to insure that time sensitive workload, such as contract development, practice implementation, payments and other program activities are accomplished by established deadlines.

Individual employees must then schedule specific activities and make appointments with internal and external customers in order to ensure that their workday reflects those priorities.

The State will prepare a yearly master schedule as part of the business plan. It will include activities such as training, quality reviews, group meetings and other activities of a statewide importance.

Supervisors and staff are encouraged to use Outlook calendar and share schedules within their team. Supervisors are responsible for maintaining a yearly calendar. All employees are expected to maintain a monthly and weekly calendar that is readily available to their supervisor and team members. These calendars must be as specific as possible. An employee's schedule must provide documentation of both scheduled activities and those actually carried out. Significant changes in the planned schedule will be noted so it will directly support WebTCAS.

WA404-4

Title 330 - General Manual

Part 404 - Directing

Supervisors will review WebTCAS and corresponding schedules to ensure that planned priority work which was scheduled is actually being worked on and accomplished. If a supervisor determines that scheduling priority work and following that schedule is a problem, he or she will take the following steps with the individual employee(s):

(a) Supervisors will review the weekly schedule to ensure that it is as specific as possible with names of internal and external customers with specific appointments (if applicable), and identify specific work activities/tasks.

(b) The employee will clearly document the actual work accomplished each day on the schedule.

(c) If the weekly schedule is written on a hard copy, then line through the original planned activities not followed and write in the actual activity.

(d) If the weekly schedule is in an electronic version like Excel, Word or Outlook, devise a way to show the difference between the original planned activities and the actual activity. For example, in Outlook, use the appointment label called "Needs Preparation", which is olive in color and leave the original planned activity under the label called "Business", which is blue.

(e) The supervisor would then compare every pay period until satisfied that the weekly schedule, which records planned and actual activities, with the WebTCAS reports to determine if priority work is being accomplished as directed.

404.4 - Servicing

Introduction

Servicing is providing technical assistance to individuals, groups, and units of government on planning, application, and operation and maintenance of conservation measures. Case files are to be organized to facilitate servicing.

WA404-5

Title 330 - General Manual

Part 404 - Directing

Policy

Each field office is to establish and implement a servicing system within guidelines established by the state conservationist and Director of the Caribbean Area.

Guidelines

The elements of a servicing system include:

- Recognizing NRCS and conservation district objectives and priorities.
- Grouping recipients of technical service by areas, communities, watersheds, or any other geographic means that facilitate efficient and effective assistance.
- Classifying land users within each group in order to work with them most expeditiously. The classification system is to recognize those individuals, groups, and governmental agencies who have priority resource problems; need technical assistance to plan, revise, or apply resource management systems (RMS); or need recurring assistance to maintain the RMS.
- Providing technical assistance in a timely manner to reflect land user's current needs and objectives and to implement changes in technology.
- Deciding frequency of servicing contacts.
- Using a case file in accordance with National Conservation Planning Manual, Part 506, Planning Assistance.
- Committing land users to the next job. These commitments should be recorded on conservation assistance notes in the case file and on appropriate schedules.
- Developing priority commitments in field office schedules.
- Maintaining contact with land user.

The following are available for use in a servicing system:

- Form SCS-MGT-197, Record Card, may be used to record names and locations of individuals, groups, and units of government with whom repeated contacts are anticipated. It provides space to record other data essential to the servicing system
- Form SCS-MGT-198, Record of Recipients of Technical Services, may be used to record names and locations of individuals, groups, and governmental agencies with whom repeated contacts are anticipated

WA404-6

Title 330 - General Manual

Part 404 - Directing

- Form SCS-MGT-198a, Technical Service Provided, may be used as a companion form with Form SCS-198 to record the giving of technical services
- Rubber stamp or adhesive sticker which can be placed on the case file folder to record the first technical service (102) and the first practice applied (106) each fiscal year
- FOCAS software when available

404.5 - Follow-Up

Follow-up by program managers and supervisors is an important element in management. It is much broader than the traditional concept of follow-up as an aspect of conservation planning and implementation assistance. Follow-up is needed at all levels of the organization to assure that we are on track with carrying out the plan of operations. It provides a mechanism by which employees can maintain their focus on high priority work. With the emphasis on production, follow-up on how we are doing in carrying out the plan of operations is essential at all levels.

Follow-up can take many forms. Managers and supervisors will need to decide what is best for their situation. Follow-up is to be an integral part of the management process at all levels to achieve the desired results and assure program and fund accountability.

404.6 - Performance Appraisals

Introduction

Employee performance appraisal worksheets (AD-434a and 434b) are based on assignments, goals shown in plan of operations, work plans, individual development plans, and position descriptions. Performance elements and standards for performance show what is expected during the rating period and serve as the basis to measure employee performance. The performance appraisal worksheets are "an agreement" between the supervisor and the employee. The plan of operations may be used as a management tool in writing the quantity, quality, and timeliness criteria for performance standards. Quality of an employees performance is determined primarily in the evaluating function.

Policy

Policy and procedures on performance appraisals is described in GM-360-409.

WA404-7