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WASHINGTON BULLETIN NO. WA-360-07-4

SUBJECT: PER - Performance Management

Purpose: Reminder to close out FY07 PWPs and establish FY07 PWPs and IDPs

Expiration Date: September 30, 2008

ACTION REQUIRED BY: NOVEMBER 1, 2007

This is a reminder to close out Fiscal Year 2007 Performance Work Plans and establish new Performance Work Plans and Individual Development Plans for Fiscal Year 2008. FY07 performance summary ratings, FY08 performance plans, and FY08 Individual Development Plans should all be finalized no later than November 1, 2007.

Performance Work Plans (PWPs) must be established, reviewed and closed out electronically through the EmPowHR system. Complete performance management policy is available on the web at <http://directives.sc.egov.usda.gov/> Title 360, Part 409. Instructions for using the EmPowHR system will be sent out by Cheryl Miller under separate cover. Please review these instructions carefully.

A rating of record (also referred to as a summary rating) is the final rating issued at the end of the appraisal period. An employee's FY07 performance work plan must have been finalized and in place for a minimum of 90 calendar days for a rating of record to be conducted. Supervisors must notify employees who have not served under established standards for the minimum appraisal period that the timeframe for the appraisal is being extended to meet this requirement. The extension must be documented in writing, with a copy furnished to Human Resources (HR) for tracking purposes.

Documentation is required for each element in which the employee receives a rating of "Exceeds Fully Successful" or "Does Not Meet Fully Successful." Documentation must show how the employee's performance exceeded or failed to meet the fully successful standard. Documentation of accomplishments for elements that are appraised at the "Meets Fully Successful" are encouraged but not required.

There are five possible summary rating levels.

- **Outstanding** - performance of very high quality. Employee produces exceptionally high quality work; employee produces work that is significantly ahead of established schedules or deadlines, and employee completes work with little or no supervision. Performance for each element exceeds the Fully Successful level.
- **Superior** - performance of unusually good or excellent quality. Employee produces high quality and/or quantity of work ahead of established schedules or deadlines and with less than normal supervision.

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- Fully Successful - performance is of good quality. Employee produces the expected quantity and/or quality of work and meets deadlines or schedules for completion of work.
- Marginal - performance needs improvement to achieve the “Meets Fully Successful” level. Employee demonstrates the need for close supervisory review, discussion, and/or correction of work products. Performance does not require that an Opportunity to Improve (OTI) be issued.
- Unacceptable - performance fails to meet established “Meets Fully Successful” performance standards in one or more critical elements of the employee's position. Corrective action is necessary. An OTI must be initiated.

After closing out FY07 performance plans, either the employee or the supervisor may initiate a FY08 PWP. Rating officials and employees should work together to jointly clarify how competencies apply within the work environment so that there is a common understanding of performance expectations. In addition, there should be a discussion of the goals for both individual work and the employee's involvement/contribution to team goals for the upcoming year, and the employee's Individual Development Plan should be reviewed and updated. Performance Work Plans (PWP) must be established electronically through the EmpowHR (ICAMS) system. Employees should have new standards by October 31, 2007.

Please note that the rating official is ultimately responsible for making sure plans are finalized and for setting performance elements and standards, and new performance plans are not officially in place until after the supervisor has marked the plan 'Final' in ICAMS and hit the yellow 'Save' button. Employees should document that they have viewed the plan by clicking the 'Employee Viewed Plan' box in the electronic PWP and hitting the yellow 'Save' button.

Communication between the rating official and the employee is essential throughout the performance cycle.

If you have any questions regarding the documentation of performance, or questions regarding the performance management policy in general, please contact Cheryle at (509) 323-2931 or Eileen at (509) 323-2934.

/s/ Stefan Fechter

A. STEFAN FECHTER
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