Career Planner User Guide

For Employees & Supervisors

September 2021
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Definitions

**Average Assessed Proficiency Rating**: the score calculated by averaging the proficiency ratings provided by the employee in the self-assessment and/or the supervisor evaluation; if one proficiency rating was not provided, the assessed proficiency score included only the provided rating

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

**Gap**: an area where the employee has not met the proficiency expectations for their role/grade level; determined by subtracting the target proficiency rating from the average assessed proficiency rating; a negative value

**Group**: second level organization of a task within a competency

**Resource**: a course, website, handbook, etc. that is currently available through NRCS and the Farm Production and Conservation (FPAC) Mission Area to help employees learn and accomplish the important tasks that they are responsible for in their roles

**Self-Assessed Proficiency Rating**: the current proficiency level indicated by the employee for a specific task

**Subgroup**: third level organization of a task within a competency

**Supervisor Assessed Proficiency Rating**: the current proficiency level indicated by an employee’s supervisor for a specific task

**Surplus**: an area where the employee has met or exceeded the proficiency expectations for their role/grade level; determined by subtracting the target proficiency rating from the average assessed proficiency rating; a positive value

**Target Proficiency Rating**: the expected level of proficiency for a given grade in a competency; serves as a benchmark when assessing employees’ current level of proficiency

**Task**: an action that the individual needs to be able to perform in order to function in their job at the appropriate grade level; the majority of the tasks within the career planners apply to the job across the nation, but states have the ability to customize the career planner by adding additional state-specific tasks

**Tool**: a device or application that is currently available through NRCS and/or the FPAC Mission Area that supports an individual in completing a task
Introduction to the Career Planner

Description

A career planner is an interactive training plan that details the tasks that an employee needs to accomplish to do their job successfully. It is designed to help employees identify what training is needed in their current grade level and as they continue with their career at NRCS.

Additionally, each task is linked to a list of resources and tools that are currently available through NRCS and the Farm Production and Conservation (FPAC) Mission Area that help employees accomplish that task. While the resources and tools listed within this document are comprehensive, they are not exhaustive.

The information within each career planner applies to the job across the nation. However, some customization may be needed for states, divisions, and centers. States, divisions, and centers can customize the career planner by adding additional state-specific tasks and resources. The target proficiency ratings within the planner may also be tailored to the job requirements of each individual employee at the discretion of the employee’s supervisor. Individual employees do not have the ability to change the information within the career planner to ensure the job duties expectations are only set at the supervisory level and above.
Development

The career planner content was created using materials from the FPAC Mission Area (e.g., position descriptions) and outside sources (e.g., OPM's position classifications). Then, subject matter experts (SMEs) at various GS levels from across the country reviewed and edited the career planner content to ensure it accurately reflected what is needed to successfully perform the job. Following the workshop, a survey was administered to the SMEs to identify the importance of each task, whether each task was needed at entry, and the target proficiency rating for each task. Lastly, the information from the survey was analyzed and inputted into the career planner for the appropriate job series.

Use

An employee will first input self-assessed proficiency rating for each task into the career planner. Then, their supervisor will input their assessment for the employee for each task within the fields labeled “supervisor assessed proficiency rating.” Once both of these types of ratings are entered, the average assessed proficiency ratings will automatically be calculated and populated within the career planner. The average assessed proficiency rating is then compared to the target proficiency rating, resulting in either a gap, surplus, or target met. Employees will then identify resource(s) and/or tool(s) that align with the tasks that they are deficient in.

From an agency perspective, NRCS will use the career planner for training and development purposes to add consistency and structure to employee development across the organization. Because career planners set standard expectations, they are an excellent starting point for expected knowledge, skills, and abilities of employees. The career planner provides a comprehensive roadmap for employee development at all grade and career levels. Career planners should not be used for performance management or promotion decisions.
Role & Responsibilities
States, Divisions, & Centers

Leaders at the states, divisions, and centers are responsible for encouraging the use of the career planners and adding state-, division-, and center-specific task information as needed. Instructions on how to do this are included in a separate user guide.

Supervisors

Supervisors are responsible for communicating and implementing the career planners with their employees as well as completing the supervisor portions of the career planner. Information on how to do this is included in this user guide.

Supervisors can alter target proficiency ratings within the planner so that they best fit the job requirements of each individual employee. However, this should not be a common occurrence as the nationally set target proficiency ratings were determined through a rigorous, data-driven process.

Employees

Employees are responsible for completing most of the career planner and coordinating its overall completion with their supervisor. Information on how to do this is included in this user guide.
Instructions - Employees

Step 1: Open the Career Planner

1. Locate the appropriate career planner for your state, division, or center as well as your series, job and/or role.
   A. If your state, division, or center does not adopt and does not customize a career planner:
      o Access the national version of the corresponding career planner on the national Career Planner SharePoint Page.
   B. If your state, division, or center adopts but does not customize a career planner:
      o Access the career planner on the appropriate state, division, center, or national SharePoint site.
   C. If your state, division, or center adopts and customizes a career planner:
      o Access the customized career planner on your internal SharePoint site.

2. Download and save a copy of the career planner file.

3. Open the career planner file using the Excel desktop application.

4. Click the Enable Content button in the yellow bar with the message “Macros have been disabled.”

Step 2: Populate the Career Planner with your Identifying Information

1. Click the Home button under Navigation.

2. Input your name, working title, duty station and the date into the yellow boxes.

3. Provide your grade by selecting an option from the drop-down menu.
   • A GS level must be selected to review your competency assessment results and training plan.

4. Review your information to ensure it is accurate.
Step 3: Review Key Definitions and Target Ratings

1. Click the Key Definitions & Target Ratings button under Navigation.

2. Click the Competency & Proficiency Definitions button to review the definition of each competency and proficiency level.
   - **Note:** The competencies in your career planner may vary from the ones shown below and throughout the user guide.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Competency Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservation Planning</td>
<td>Apply scientific knowledge to promote the conservation of soil, water, air, plants, animals, and energy and humans</td>
</tr>
<tr>
<td>Farm Bill Program Management</td>
<td>Administer and manage Farm Bill program resources, projects, and activities to meet program goals and objectives</td>
</tr>
<tr>
<td>Compliance</td>
<td>Follow the applicable regulations and laws at the national, state, and local levels</td>
</tr>
<tr>
<td>Technical Expertise</td>
<td>Apply knowledge of all areas of NRCS's conservation portfolio to assess and address various resource concerns</td>
</tr>
<tr>
<td>Outreach</td>
<td>Educate members of the public on natural resource conservation</td>
</tr>
<tr>
<td>Project/Program Management</td>
<td>Apply knowledge, skills, tools and techniques to manage activities and resources to meet project/program requirements</td>
</tr>
<tr>
<td>Foundational</td>
<td>Apply understanding of foundational professional knowledge, skills and abilities to individually contribute to the organization</td>
</tr>
<tr>
<td>Leadership &amp; Management</td>
<td>Apply strategic and advanced professional knowledge, skills and abilities to influence others as well as guide the organization</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Competency Definitions</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 - Master</td>
<td>Demonstrates extensive depth and breadth of expertise in advanced concepts and processes.</td>
</tr>
<tr>
<td></td>
<td>Applies the competency in highly complex and ambiguous situations within and across disciplines.</td>
</tr>
<tr>
<td></td>
<td>Individuals operating at this level of proficiency serve as an acknowledged authority, advisor, and key resource within the agency in relation to this competency.</td>
</tr>
<tr>
<td>4 - Advanced</td>
<td>Demonstrates extensive understanding of advanced concepts and processes.</td>
</tr>
<tr>
<td></td>
<td>Applies the competency in complex and unstructured situations.</td>
</tr>
<tr>
<td></td>
<td>Individuals operating at this level of proficiency seek guidance as needed and serve as a resource to others in relation to this competency.</td>
</tr>
<tr>
<td>3 - Fully Proficient</td>
<td>Demonstrates thorough understanding of core concepts and processes.</td>
</tr>
<tr>
<td></td>
<td>Applies the competency in routine and non-routine situations.</td>
</tr>
<tr>
<td></td>
<td>Individuals operating at this level of proficiency work independently with minimal guidance and direction to perform tasks associated with this competency.</td>
</tr>
<tr>
<td>2 - Basic</td>
<td>Demonstrates familiarity of concepts and processes.</td>
</tr>
<tr>
<td></td>
<td>Applies the competency to a wide range of routine, structured situations.</td>
</tr>
<tr>
<td></td>
<td>Individuals operating at this level of proficiency require regular, specific guidance to perform tasks associated with this competency.</td>
</tr>
<tr>
<td>1 - Awareness</td>
<td>Demonstrates a basic awareness of concepts and processes.</td>
</tr>
<tr>
<td></td>
<td>Applies the competency in the simplest situations.</td>
</tr>
<tr>
<td></td>
<td>Individuals operating at this level of proficiency require close and extensive guidance to perform tasks associated with this competency.</td>
</tr>
<tr>
<td>0 - No Proficiency</td>
<td>Has no existing knowledge of concepts and processes.</td>
</tr>
<tr>
<td></td>
<td>Does not apply the competency.</td>
</tr>
<tr>
<td></td>
<td>Individuals operating at this level of proficiency require detailed instructions and complete oversight to perform tasks associated with this competency.</td>
</tr>
</tbody>
</table>

3. Click the Target Proficiency Ratings button to review the target proficiency levels associated with each competency and task at each GS level.

<table>
<thead>
<tr>
<th>Group</th>
<th>Subgroup</th>
<th>Task</th>
<th>GS 05</th>
<th>GS 07</th>
<th>GS 09</th>
<th>GS 11</th>
<th>GS 13</th>
<th>GS 15</th>
<th>GS 17</th>
<th>GS 19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collection &amp; Analysis</td>
<td>Identify Problems</td>
<td>Observe and document the resource concerns</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Collection &amp; Analysis</td>
<td>Identify Problems</td>
<td>Communicate with the producer to understand the resource concerns</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Collection &amp; Analysis</td>
<td>Determine Objectives</td>
<td>Communicate with the producer to determine and document their objective</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

4. Click the Key Terms & Definitions button to review definitions for key terms found in the career planner.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency</td>
<td>A measurable pattern of knowledge, skills, abilities, behaviors, and other characteristics that an individual needs to perform work roles or occupational functions successfully</td>
</tr>
<tr>
<td>Group</td>
<td>Second level organization of a task within a competency</td>
</tr>
<tr>
<td>Subgroup</td>
<td>Third-level organization of a task within a competency</td>
</tr>
<tr>
<td>Task</td>
<td>Actions that the individual needs to be proficient in, at a certain level, in order to function in their job at the appropriate grade level</td>
</tr>
<tr>
<td>Short Term Goal</td>
<td>A task that you want to achieve the target proficiency in within one year</td>
</tr>
<tr>
<td>Mid Term Goal</td>
<td>A task that you want to achieve the target proficiency in within two years</td>
</tr>
<tr>
<td>Long Term Goal</td>
<td>A task that you want to achieve the target proficiency in over three years</td>
</tr>
<tr>
<td>Supervisor Assessed Proficiency Rating</td>
<td>The proficiency rating that an employee's supervisor believes the employee is currently operating at for a specific task</td>
</tr>
<tr>
<td>Self-Assessed Proficiency Rating</td>
<td>The proficiency rating that an employee believes they are currently operating at for a specific task</td>
</tr>
<tr>
<td>Average Assessed Proficiency</td>
<td>The score calculated by averaging the proficiency ratings provided via the self-assessment and/or supervisor evaluation; if one proficiency rating was not provided, the assessed proficiency score included only the provided rating</td>
</tr>
<tr>
<td>Target Proficiency Rating</td>
<td>The expected proficiency for a given grade in a competency; serves as a benchmark when assessing employees' current level of proficiency</td>
</tr>
</tbody>
</table>
Step 4: Input Your Current Proficiency Ratings

1. Click the **Competency Assessment** button under **Navigation**.

2. Use the **Competency** filter to select a competency and review the associated tasks.
   - *Once a competency is selected, the competency button will turn blue.*

3. Input your self-assessed proficiency rating for the chosen tasks using the drop-down menu.
   - *Navigate to the column titled **Self-Assessed Proficiency Rating**.
   - *Select a proficiency rating using the drop-down menu in the yellow boxes for the chosen task.*
   - *You do not need to provide a rating for all the tasks under each competency for the career planner to function correctly.*

Step 5: Email the Career Planner to your Supervisor

1. Save the changes you made to the career planner.

2. Email the career planner to your supervisor.
   - *Attach the career planner Excel file to the email.*
   - *In your email, direct them to the supervisor instructions on the **Competency Assessment** screen and ask them to email the document back to you when they are finished.*

**IMPORTANT:** It is recommended that you have supervisors complete their ratings for the competencies you filled out *before* you continue to the following steps.
Step 6: Identify Tool(s) and/or Resource(s) for Competencies and/or Tasks with Gaps

1. Open the completed career planner file you received from your supervisor using the Excel desktop application and save a copy.

2. Click the Tools & Resources button under Navigation.

3. Select Gap from the Gap/Surplus filter.

4. Use the Competency and Task filters to select the competency and/or task you would like to view tools and resources for.
   - When a user clicks a blue button, all the other buttons within that filter will turn gray and the table will only show information related to the button in blue. Multiple filters can be applied at once. To remove a filter, click the button to the right of the filter header.

5. Mark the corresponding tool(s) or resource(s) using the drop-down menu.
   - Navigate to the column labeled Complete?
   - Mark the tool or resource as “To-do” or complete (check mark) using the drop-down menu in the yellow boxes.
   - Once a selection has been made from the drop-down menu, the yellow box will turn blue.
   - You do not need to provide a selection for all the tasks under each competency for the career planner to function correctly.
Step 7: Review your Competency Assessment Results

1. Click the Results & Training Plan button under Navigation.
   - A GS level must be selected to receive your results. To select a GS level, click the Home button under Navigation.

2. Review your competency assessment results.
   - Filter by competency using the blue buttons under the competency header. When a user clicks a blue button, all the other buttons within that filter will turn gray and the table will only show information related to the button in blue. Multiple filters can be applied at once. To remove a filter, click the button to the right of the filter header.

Step 8: Determine your Goals

1. Identify the type of goal for each competency gap using the drop-down menu.
   - Navigate to the column labeled, Type of Goal.
   - Mark the type of goal as “short”, “mid”, or “long term” using the drop-down menu in the yellow boxes.
   - Once a selection has been made from the drop-down menu, the type of goal will populate in the yellow box.
   - Make sure to select a type of goal for all applicable gaps.
Step 9: View, Print, and Save your Training Plan

1. Click the View Report button to view your training plan.

2. Review your training plan.
   - Use the scroll bar to view the multiple sections of your report.
   - If you want to make edits to the data in your report, select the Return to Results button.

3. Select the Export Report to PDF button on the left side of the window.
   - Your training plan will open as a PDF file in a new window.

4. Save the PDF report to your computer, adding your name and the date to the file name.
**ADDITIONAL FUNCTION:** Import Previous Assessment

Use this function to import information from a previous career planner into a newer version of the career planner.

1. Open your previous career planner with your completed assessment and training plan, as well as the new version of the career planner without ratings.

2. On the PREVIOUS version of the planner, click the **Import Previous Assessment** button under *Navigation* then click the **Import Previous Information** button.

3. On the NEW version of the planner, click the **Import Previous Assessment** button under *Navigation* then click the **Update New Career Planner** button.
Instructions - *Supervisors*

**Step 1: Open the Career Planner**

1. Locate your employee’s email with their attached career planner file.

2. Download and save a copy of the career planner file.

3. Open the career planner file using the Excel desktop application.

4. Click the **Enable Content** button in the yellow bar with the message “Macros have been disabled.”
Step 2: Provide Employee Proficiency Ratings

1. Click the Competency Assessment button under Navigation.

2. Provide an assessed rating for the appropriate tasks and/or competencies using the drop-down menu.
   - Navigate to the column labeled Supervisor/Trainer Assessed Proficiency Rating.
   - Select a proficiency rating using the drop-down menu in the yellow boxes for the chosen task.

   ![Image of the Competency Assessment table]

   **IMPORTANT**: A supervisor can modify their employee’s target proficiency rating (as necessary) using the drop-down menu under Modified Target Proficiency Rating (Employee). It is your responsibility as a supervisor to ensure that target ratings are only modified when necessary. Please communicate to your employee the reasoning why a target proficiency rating has been changed by you.

   **TIP**: Reference the Key Definitions & Target Ratings page when providing your assessed proficiency ratings. Abbreviated definitions of the proficiency levels are:

   - 0 – No Proficiency: not applied, require detailed instructions and complete oversight
   - 1 – Awareness: applied in simplest situations; require close and extensive guidance
   - 2 – Basic: applied in routine, structured situations; require regular, specific guidance
   - 3 – Fully Proficient: applied in non-routine situations; require minimal guidance
   - 4 – Advanced: applied in complex, unstructured situations; serve as a resource
   - 5 – Master: applied in highly complex, ambiguous situations; serve as an advisor

Step 3: Email Career Planner to your Employee

1. Save the changes you made to the career planner.

2. Email the career planner to your employee.
   - Attach the career planner Excel file to the email.
   - In your email, confirm with your employee that you have input the Supervisor/Trainer Proficiency Ratings for their tasks.