

UNITED STATES DEPARTMENT OF AGRICULTURE  
**PERFORMANCE PLAN, PROGRESS REVIEW AND APPRAISAL WORKSHEET**

1. Name (Last, First, M.I.)  Position Title:  Travel Specialist	Pay plan, Series, Grade  GS-301-7	Agency/Division  Agricultural Research Service	<b>APPRAISAL PERIOD</b>	
			From:	To:

**2. PERFORMANCE ELEMENT**

**No. | 1 |** (Describe below the duty or responsibility for which the employee is accountable and responsible. Indicate if the element is critical or noncritical.)

| X | CRITICAL | | NONCRITICAL

**Delivery of Travel Services**

Initiates, coordinates, prepares, and transmits the Foreign Travel Plan. Prepares or reviews proposed travel authorizations; reviews supporting documentation for technical adequacy for foreign travel or foreign assignments; reviews travel requests and vouchers and monitors status of travel advance balances; prepares requests for official passports, visas, security clearances, and medical examinations; serves as relocation services coordinator and initiates and processes relocation actions; and determines if travel funds contributed by outside organizations are allowable and prepares appropriate response for authorizing official. Assists employees with emergency travel situations such as natural disasters or illness. Researches and analyzes federal travel and relocation regulations and guidance to advise and assist employees in planning travel and transportation and resolving problems. Responsible for the security of official passports retained at the location. Serves as Area Coordinator of the travel charge card program, and is responsible for monitoring monthly travel card activity reports. Based on these reports, identifies possible misuse and prepares memos for supervisor's signature to the employees and other documentation; reviews responses from those employees. Interprets Federal, Departmental and Agency policies and advises employees and managers on the impact to travel and transportation situations. Maintains contact with locations, area and headquarters personnel and non-federal organizations such as cooperators and travel management centers.

Alignment of Strategic Plan. This position supports the accomplishment of ARS Strategic Plan Goal #6 (Management Initiatives) as this position supports the Area Budget and Fiscal Officer in overseeing travel functions; processing relocations and foreign travel requests; issuing procedures and guidance in the areas of travel and relocation; monitoring travel charge card activity of all area employees. The performance elements and standards in this performance plan reflect the specific results, outcomes, and/or accomplishments expected.

**3. STANDARD** (Describe the level expected for "Fully Successful" performance. Include appropriate indicators of quality, quantity, cost efficiency, or timeliness, where applicable.)

Foreign Travel Plans (FTP) are prepared, completed, and submitted accurately, timely and in accordance with governing regulations and procedures. No more than 3 content correction errors are reported on a quarterly basis. Appropriate travel information will be retrieved and provided to the supervisor within one day of request. All requests for travel orders and vouchers are accurately and timely processed within 3 days of receipt. Responds to customer questions and concerns accurately, according to procedures with no more than 4 valid customer complaints. Advice and interpretation of policy and regulations are accurate and provided timely. Location travel practices are monitored to ensure compliance with regulations, policies, and procedures. Completes tasks and assignments in an organized, efficient manner and within specified deadlines as communicated by the supervisor. Supervisor is informed of potential problem situations on a timely basis.

Specific Goal: Effectively Learn the FMMI System as a vendor coordinator to deliver effectively and efficient customer service.

**4. ELEMENT RATING** (At the end of the rating period, compare the employee's performance with standard and assign an element rating.)

| | EXCEEDS | | FULLY SUCCESSFUL  
 | | DOES NOT MEET

**ACCOMPLISHMENTS**

**5. CERTIFICATION OF DEVELOPMENT AND RECEIPT OF PLAN**

Signatures certify discussion with the employee and receipt of plan that reflects current position description

Employee's	Date
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Supervisor's Signature	Date
Reviewer's Signature	Date

6. PROGRESS REVIEWS (at least one must be completed)

Employees' Initials and Date			Supervisor's Initials and Date		

AD-435B 12/86 \_\_\_ Original-Official Personnel Folder, \_\_\_ Employee's Copy \_\_\_ Supervisor's Copy \_\_\_ Agency Copy Page \_\_\_ of \_\_\_

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**2. PERFORMANCE ELEMENT**

No. | 2 | (Describe below the duty or responsibility for which the employee is accountable and responsible. Indicate if the element is critical or noncritical.)

| X | CRITICAL | | NONCRITICAL

Travel Systems Coordination and Area FATA

Serves as Federal Agency Travel Administrator (FATA) for the e-travel system. Responsible for loading, updating and maintaining tables including, personnel tables, organizational tables, permissions routing tables, and profiles on each area user and traveler. Produces systems reports on a recurring basis. Provides assistance to users and authorizing officials with the travel system. Serves as Area contact for users of GovTrip and the National Finance Center's on-line travel system (TRVL) for input of travel authorizations and vouchers and the ARS Foreign Travel Information System (FTIS) for approval and documentation of foreign travel. Trains and provides assistance to Area users of all travel systems, and maintains current information in the FTIS.

**3. STANDARD** (Describe the level expected for "Fully Successful" performance. Include appropriate indicators of quality, quantity, cost efficiency, or timeliness, where applicable.)

Receives customers' inquiries, determines appropriate action to resolve issues, and provides technically sound advice and accurate feedback to the customer within 3 days. No more than 4 valid complaints received during the rating period. Identifies and assesses deficiencies and follows-up on corrective actions. Effectively maintains data in the GovTrip and FTIS in accordance with established procedures as required by Headquarters.

**4. ELEMENT RATING** (At the end of the rating period, compare the employee's performance with standard and assign an element rating.)

| | EXCEEDS | | FULLY SUCCESSFUL  
 | | DOES NOT MEET

**ACCOMPLISHMENTS**

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			From:	To:

**2. PERFORMANCE ELEMENT**

**No. | 3 |** (Describe below the duty or responsibility for which the employee is accountable and responsible. Indicate if the element is critical or noncritical.)

|  | CRITICAL    |  | NONCRITICAL

**Training**

Assists in developing training aids and conducting training classes for Area employees that are tailored to individual or group needs. Includes Area policies, procedures, and utilizes web based training, video conferencing, and other methods for presentations. Assists Financial Management Divisions – Travel and Relocation Services Branch in developing Agency-wide training classes and participates in delivery.

**3. STANDARD** (Describe the level expected for "Fully Successful" performance. Include appropriate indicators of quality, quantity, cost efficiency, or timeliness, where applicable.)

Plans, assists, and conducts training to meet the trainees' needs. Training provided is clear, easily understandable and meets the established objectives/goals of the training being given. Surveys of training needs will be analyzed and recommendations made to meet identified training needs. Supervisor is informed on problematic issues or concerns within one day of employee becoming aware of the situation/problem.

**4. ELEMENT RATING** (At the end of the rating period, compare the employee's performance with standard and assign an element rating.)

|  | EXCEEDS    |  | FULLY SUCCESSFUL  
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**2. PERFORMANCE ELEMENT**

**No. | 4 |** (Describe below the duty or responsibility for which the employee is accountable and responsible. Indicate if the element is critical or noncritical.)

|  CRITICAL | |  NONCRITICAL

**Communications, Interpersonal Relations and Customer Service**

Interacts with staff internal and external to the Area's Administrative Office to promote customer service in the accomplishment of travel activities.

Performs all duties in a manner which consistently demonstrates fairness, cooperation, and respect toward coworkers, office visitors, and all others in the performance of official business. Demonstrates awareness of EO/CR policies and responsibilities.

Through personal action, demonstrates support to Equal Opportunity/Civil Rights principles and policies in accomplishing assigned duties. Ensures written and oral communications are free of discriminatory bias. Refrains from making and discourages inappropriate comments, jokes, gestures, etc. regarding an individual's race, religion, color, age, sex, national origin, disability, or marital status when on duty or representing the Agency in any capacity. Attempts to discourage unlawful discrimination by maintaining an unbiased atmosphere. Displays a helpful attitude and willingness to assist persons to become a part of the workforce without regard to their race, color, sex, religion, national origin, age disability or handicapping condition, or marital status. Reviews and adheres to the Agency/Departmental policy on the prevention of sexual harassment in the workplace.

**3. STANDARD** (Describe the level expected for "Fully Successful" performance. Include appropriate indicators of quality, quantity, cost efficiency, or timeliness, where applicable.)

Supervisor is informed of significant circumstances within one day of employee's becoming aware of a communication or customer service problem. Informs supervisor of unusual situations that may require problem resolution by supervisor within 48 hours of finding. However, the employee is expected to resolve difficulties or rectify routine problems.

**4. ELEMENT RATING** (At the end of the rating period, compare the employee's performance with standard and assign an element rating.)

| |  EXCEEDS | |  FULLY SUCCESSFUL  
 | |  DOES NOT MEET

**ACCOMPLISHMENTS**

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<b>2. PERFORMANCE ELEMENT</b> No.   5   (Describe below the duty or responsibility for which the employee is accountable and responsible. Indicate if the element is critical or noncritical.)	CRITICAL   X   NONCRITICAL
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Special Projects

<b>3. STANDARD</b> (Describe the level expected for "Fully Successful" performance. Include appropriate indicators of quality, quantity, cost efficiency, or timeliness, where applicable.)
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Special projects are undertaken willingly and completed on time; final products are fully acceptable in terms of both form and substance. Normal assignments do not suffer as a result of the additional work.

<b>4. ELEMENT RATING</b> (At the end of the rating period, compare the employee's performance with standard and assign an element rating.)	EXCEEDS     FULLY SUCCESSFUL     DOES NOT MEET
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**ACCOMPLISHMENTS**