

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-301-9	Agency/Division Agricultural Research Service	APPRAISAL PERIOD	
			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 and/or reviews proposed travel authorizations and supporting documentation for technical adequacy and accuracy. 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: initiates and processes relocation actions, determines if travel funds contributed by outside organizations are allowable, and prepares responses for authorizing official. Ensures official passports are secured at the location. Serves as area coordinator of the travel charge card program and as such is responsible for monitoring monthly travel card activity reports. Identifies possible misuse, prepares memos for supervisor's signature and other documentation for the employee, and reviews employee's response. 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. Identifies complex travel and transportation issues and discerns overlapping issues and conflicting guidance to resolve problems. Provides advice and guidance to employees, travelers, and area program and management officials on travel policies and procedures. Maintains contacts with location, area, and headquarters personnel, and non-federal organizations such as cooperators and travel management centers. Analyzes and interprets Federal, Departmental, and Agency policies and procedures related to travel, relocation, and travel systems affecting the fiscal management of Area activities. Analyzes the effect on current processes and modifies or develops procedures for situations involving foreign travel, emergency travel for natural disasters or program emergencies, and recurring travel for scientific research, etc. Researches problems and issues effecting programs. Initiates and drafts advisory correspondence to Area locations, including implementation guidance for new policies, directives, and procedures for release by senior management.

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 2 content correction errors are identified on a quarterly basis. Appropriate travel information will be retrieved and provided to the supervisor and employee within one day of request. All requests for travel orders and vouchers are accurately and timely processed within 2 days of receipt. Responds to customer questions and concerns accurately with no more than 2 valid customer complaints. Completes tasks and assignments in an organized and efficient manner within specified deadlines as communicated by the supervisor. Researches information and guidance on how to effectively handle difficult travel and relocation situations and provides accurate guidance and timely advice to employees and travelers on travel and relocation policies and procedures within 2 days. 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. Written guidance complies with established policies, is accurate, easy to follow and understand. Supervisor is informed of potential problem situations on a timely basis.

Specific goals: Become proficient in the use of the FMMI system to deliver effective 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
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
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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 2 days. No more than 2 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
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ACCOMPLISHMENTS

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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.)	X CRITICAL NONCRITICAL
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Training

Develops training aids and conducts 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 the delivery.

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

Plans, organizes, 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 DOES NOT MEET
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ACCOMPLISHMENTS

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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.)

| X | 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

