UNITED STATES DEPARTMENT OF AGRICULTURE

PERFORMANCE PLAN, PROGRESS REVIEW AND APPRAISAL WORKSHEET

1. Name (Last, First, M.I.)	Pay Plan, Series, Grade	Agency/Division	APPRAISAL PERIOD	
Position Title: Administrative Officer	GS-0341-		From 04/01	To 03/31

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 non-critical.)	[X] CRITICAL [ ] NON CRITICAL

Advisory Services and Leadership

Alignment to Strategic Plan: This position directly contributes to the accomplishment of ARS Strategic Plan Goal #6 (Management Initiatives) as this position is responsible for providing optimum delivery of administrative management support and service within the Location. 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.)

Assures that the agency's administrative management principles are appropriately incorporated into the Location's program scientific solutions. Serves as the primary resource to the Location leadership team on how to utilize the various administrative and financial management tools to meet the program goals of the Location.

Provides accurate advice and guidance to Research Leaders and employees in a timely manner on USDA/ARS administrative policies, procedures, rules and regulations in support of research activities.

On occasions where the routine business approach does not meet the Location's needs, consistently identifies alternatives which can satisfactorily meet the program requirements within the agency's regulatory framework.

Provides management analysis services to Research Leaders and assists them by anticipating and solving problems within delegated authority.

Works in a cooperative manner with Headquarters and Area personnel to accomplish program objectives. Coordinates in an appropriate manner with the Area Office and/or Headquarters staff when there are problems with Agency systems which may be hindering the delivery of services at the Location.

Coordinates Location administrative workload with research unit program support staff, and consistently meets established deadlines. Provides leadership to Location Support Staff in accomplishing administrative functions and in resolving non-routine problems.

Provides mentoring to the Location Support Staff on (1) the agency's administrative management policies, processes and resources and (2) how to integrate these programs into supporting the Location's goals.

Serves as a resource to the Area Office, other Locations, and Headquarters staff on critical activities and new initiatives.

GOALS: (Suggested) Serves as a mentor to new AO's, and participates in Area and Agency committee and task force assignments that relate to administrative management, such as participation on Area AO Steering Committee or on CARE Team.

4. CERTIFICATION OF DEVELOPMENT AND RECEIPT OF PLAN
Signatures certify discussion with the employee and receipt of plan which reflects current position description.

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

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

Employee's Initials and Date	Supervisor's Initials and Dates

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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 non-critical.)	[X] CRITICAL [ ] NON CRITICAL

Work Planning and Customer Service

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

Business plans (or work plans) indicate an understanding of the Location's, Area's, and Agency's priorities.

Organizes work and manages time to achieve maximum productivity. Plans, executes and monitors assignments (including the monitoring of work assigned to Location Support Staff) in accordance with Location objectives and customer needs. Adjusts work plans and priorities in response to changing circumstances.

Promptly responds to high priority and controversial/sensitive matters, avoiding serious loss or setbacks, while simultaneously addressing routine matters.

Completes tasks and assignments within specified deadlines; keeps supervisor informed of any problems or delays encountered in handling controversial issues.

Attends Location Management Team meetings and hosts Location Support Staff and Unit Program Support Staff meetings to discuss critical administrative management function updates and processes.

Seeks continuous improvement in the quality and delivery of products and services by encouraging customer input and welcoming suggestions for improvement. Requests for information from Agency co-workers and non-Agency customers are handled promptly; information provided is consistently accurate and comprehensive.

Maintains an open line of communication between the Area Office and the Location staff. Keeps Headquarters, Area, and Location managers informed of any sensitive issues or potential problems in sufficient time to avoid serious consequences.

Advises Location personnel and establishes, through personal example, that inappropriate comments, jokes, gestures, etc., regarding race, age, color, sex, religion, national origin, individuals with disabilities, sexual orientation or marital status will not be tolerated.

Is conversant on the Agency's Affirmative Employment Program Plan (AEPP) and actively participates in the accomplishment of goals and objectives.

Distributes to all employees (with supportive comments) Agency and Departmental EEO policy and guidance. Maintains an atmosphere of equal treatment in the work unit by discouraging discrimination of all forms. This includes assuring the prompt and fair resolution of all formal and informal complaints of discrimination. Reviews and adheres to the Agency/Departmental policy on the prevention of sexual harassment in the workplace.

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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 non-critical.)	[X] CRITICAL [ ] NON CRITICAL

Financial and Resource Management

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

Manages and leads the planning and execution of the Annual Resource Management Plan (ARMP) for the Location. In consultation with Research Leaders, assures that ARMPs documents are prepared in accordance with Agency policy and guidelines. Meets submission deadlines and only minor revisions are required to final document.

Reviews Location budgets to ensure fiscal integrity and that expenditures do not exceed authorized CRIS allocations. Ensures that Research Leaders have access to accurate status of funds on a monthly basis so that they may plan expenditures and avoid over or under obligation of funds prior to the end of the fiscal year. Spots problem areas in advance and provides advice and guidance on resolving any irregularities, including outside funding account management and transfer of funds documentation.

Ensures that initial allocations and any temporary/permanent adjustments are correctly reflected in current financial plans and that any issues are promptly brought to the attention of the ABFO for correction in FFIS. Verifies that SAMS updates and salary lapse reports reflect application of current Agency policy, and that end of fiscal year YE reports and CAM rollup are based on accurate financial plan updates and CATS reconciliation procedures. Reports submitted to the Area Office/Headquarters are consistently timely and rarely require corrections. Ensures that all Location users of CATS are adequately trained.

Works with Research Leaders in the development of Annual Facilities Management Plan and 5-year Plan that outlines construction and repair and maintenance projects. Consults with Location Facilities Operations Specialist, Area Engineer and Contracting personnel to determine specifications and prepare bid packages for projects in support of Location construction and R&M projects. Assists with the award and management of Location construction contracts to ensure that repairs are made within delegated authorities and that all construction requests follow current Agency and Federal guidelines and that all documentation is entered into the CPAIS as required. Assists Area and Facilities Division personnel in the negotiation and establishment of leases authorizing the use of non-federal property for construction purposes, and for use of non-federal, or non-ARS office, lab and greenhouse space in support of Location research missions.

Assures that the Federal physical resources of the Location are appropriately maintained. Ensures that requests for maintenance or facilities development are prioritized with input from the Location Coordinator and Research Leaders so that workload is distributed appropriately. Ensures that critical needs are met to prevent loss or damage to federal resources. Coordinates report information so report deadlines are not missed.

Provides timely and technically sound advice to the Location managers on position management and human resources options which may be available to address an issue or enhance the research program. Consults appropriately with the Area Office staff and Headquarters, Human Resources Division.

GOALS: (Suggested) ARMP package submitted prior to due date and only minor editorial changes identified; less than 1% of Location allocations left unobligated by the end of the fiscal year; continue to evaluate CATS options in order to ensure SOF reports meet needs of Location fundholders.

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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 non-critical.)	[X] CRITICAL [ ] NON CRITICAL

Delivery of Business Services

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

Provides accurate and timely advice to Research Leaders and other Location employees on the full range of administrative and financial management programs, policies and procedures (i.e., financial management, human resources, extramural/interagency agreements, safety/health/environmental programs, procurement, personal property, facilities, and real property asset management).

Serves as a resource to the Location staff in resolving human resources challenges. Monitors Location's core human resources activities such as the submission of personnel action requests, awards submissions, performance documents, and LA/STEP appointments to assure that functions are being administered in accordance with Location, Area, and Agency expectations.

Manages the agreements program at the Location ensuring compliance with applicable Federal, Department, Agency, and Area regulations, policies, and procedures. As ADO/ADODR for the Research Support Agreement with university cooperators, ensures task order requisitions are prepared properly for requesting authorized supplies and services and that cost information is accurate and obligated within current resource management guidelines. Maintains positive working relationships with University academic and administrative departments in order to facilitate quick execution of task orders or to clarify needs and prices.

Provides supervision and monitoring of the Procurement and Contracting functions for the Location, advising employees when necessary on proper methods of procurement for goods and services, and on proper documentation that is necessary to support the purchase for the files according to agency guidelines and federal regulations.

As Location Property Management Officer, monitors personal property accountability reports and inventories to ensure that requirements are met for completion and that all regulations are followed for disposition of transferred property and for excess, unserviceable and/or damaged property.

Maintains a current awareness of safety, health, and environmental requirements, as well as ARS initiatives. Consistently and uniformly applies these requirements in the workplace. Actively supports and participates in ARS/USDA safety programs instituted to ensure safety, health, and compliance with all applicable Federal, State, and Local requirements and standards.

GOALS: (Suggested) Ensures that any paperwork affecting employee pay or benefit issues is forwarded for processing in a timely manner without adverse impact to the employee.

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2. PERFORMANCE ELEMENT	
No. 5 (Describe below the duty or responsibility for which the employee is accountable and responsible. Indicate if the element is critical or non-critical.)	[ ] CRITICAL [X] NON CRITICAL

Special Projects

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

Special projects are accepted willingly and completed on time; final products are fully acceptable in terms of both form and substance. Normal assignments are not seriously affected as a result of the additional workload.

Special projects afford the opportunity to perform work outside the routine, expand into other areas, and gain exposure within the Agency. Special projects internal to the Location are also important. It is the responsibility of the individual involved to accommodate their normal assignment while they are working on a special project. It is also their responsibility to participate fully (attend all meetings, participate in the discussion, complete any assignments) in the team or task group. Feedback from the task group or team leader will be solicited for use in evaluation this element. This element will not be rated if no special projects are undertaken during the rating cycle.