

PERFORMANCE MANAGEMENT RECORD

Coverage	Bureau Appraisal Cycle	Appraisal Year
<input checked="" type="checkbox"/> General Schedule <input type="checkbox"/> Federal Wage System <input type="checkbox"/> Wage Marine	<input checked="" type="checkbox"/> October 1 – September 30 <input type="checkbox"/> June 1 – May 31 <input type="checkbox"/> November 1 – October 31	From: <u>06/01/07</u> To: <u>09/30/07</u>

Employee's Name: _____ SSN: _____

Position Title: Secretary Pay Plan, Series, Grade/Step: GS-318-09

Organization: 1. MBDA 3. Office of Business Development
2. Assoc. Dir. for Bus. Development 4. _____

PERFORMANCE PLAN CERTIFICATION

This plan is an accurate statement of the work that will be the basis for the employee's performance appraisal.

Privacy Act Statement - Disclosure of your social security number is voluntary. The number is linked with your name in the official personnel records to ensure unique identification of your records. The social security number will be used solely to ensure accurate entry of your performance rating into the automated record system.

PERFORMANCE PLAN AND APPRAISAL RECORD

Employee Name: _____	Date <u>10/01/06</u>	Element No. <u>1</u> of <u>4</u>
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Cascaded Organizational Goals

Each element must be cascaded from the DOC Strategic Goals. All Goals must be identified for each element. First, select the appropriate DOC Strategic Goal, then list the Bureau Goal, and the SES Manager Goal to complete the cascade.

DOC Strategic Goals:

- Strategic Goal 1: Provide the information and tools to maximize U.S. competitiveness and enable economic growth for American industries, workers and consumers
- Strategic Goal 2: Foster science and technology leadership by protecting intellectual-property, enhancing technical standards and advancing measurement science
- Strategic Goal 3: Observe, protect and manage the Earth's resources to promote environmental stewardship
- Management Integration Goal: Achieve Organizational and Management Excellence
- Bureau Goal:**
5 Percent increase in the American Consumer Satisfaction Index
- SES/Organizational Goal:**
Customer Relationship Management processes are implemented in Operating Units.

Critical Element and Objective

Customer Service
To respond to internal and external customers, stakeholders, and the public.

Weighting Factor (The weight for each element should reflect the significance within the framework of the Department's or bureau's organization goals. Weights should not be assigned based on the percentage of time an employee spends working on that element.) <u>Enter the weight for this element in the adjacent box. →</u>	Element Weight 35
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Results of Major Activities: Identify results that need to be accomplished in support of the performance element.
A minimum of 3 and a maximum of 6 measurable results must be listed.

- 1) Responses to customer inquiries for information or services comply with MBDA CRM standards.
- 2) Customer inquiries are acknowledged, and customers are apprised of the status of the inquiry and when to expect resolution.
- 3) Customer needs are identified, and issues are clarified in communications with the customer.
- 4) Customer expectations are managed to ensure that customers understand the type and level of service available and expected time frames.
- 5) Customer service is provided in collaboration, consultation, and partnership with customers, other agencies, and stakeholders.

Criteria for Evaluation: Supplemental Standards are required for each element and must be defined at Level 3 performance in terms of quality, quantity, timeliness, and/or cost-effectiveness. Attached Generic Performance standards also apply.

Routinely responds to each customer request with factually accurate information that is consistent with MBDA and departmental guidance and policies, as well as other relevant program or technical documents.
Work products reflect consideration of customer issues and concerns.
Routinely responds to e-mail and telephone inquiries within 16 business hours. If information is not readily available, usually responds to requests within 24-48 hours.
Answers written requests for information within 5-7 days from date of receipt, or within other time frames specified by the supervisor or program requirements.
Oral responses to customers are usually clear, courteous and directly address issues and questions.
If on approved absence, an automated notification e-mail will normally be sent in response to in-coming messages that indicates your absence, the period of absence and identifies an alternate contact. Voice mail messages must also provide the caller with the same information.

PERFORMANCE PLAN AND APPRAISAL RECORD

Employee Name: _____	Date 10/01/06	Element No. <u>2</u> of <u>4</u>
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Cascaded Organizational Goals

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- Strategic Goal 3: Observe, protect and manage the Earth's resources to promote environmental stewardship
- Management Integration Goal: Achieve Organizational and Management Excellence
- Bureau Goal:** Improve Organizational Effectiveness, Responsiveness and Efficiencies
- SES/Organizational Goal:** Improve Organizational Effectiveness, Responsiveness and Efficiencies

Critical Element and Objective

Office Operations: Develop and maintain effective and efficient administrative operations for the Office of Business Development

Weighting Factor (The weight for each element should reflect the significance within the framework of the Department's or bureau's organization goals. Weights should not be assigned based on the percentage of time an employee spends working on that element.) Enter the weight for this element in the adjacent box. →	Element Weight
	30

Results of Major Activities: Identify results that need to be accomplished in support of the performance element. A minimum of 3 and a maximum of 6 measurable results must be listed.

- 1) Administrative support is provided by preparing and proofreading correspondence memoranda, drafts, reports and forms for grammar, punctuation and format.
- 2) Travel arrangements are completed for staff.
- 3) Office calendar is updated via data entry as required by the supervisor.
- 4) Time-keeping is completed on deadline.
- 5) Meetings and conference calls are scheduled and communicated to staff.
- 6) A filing system is established and maintained.

Criteria for Evaluation: Supplemental Standards are required for each element and must be defined at Level 3 performance in terms of quality, quantity, timeliness, and/or cost-effectiveness. Attached Generic Performance standards also apply.

- 1) Generally, most correspondence/document(s) is returned to the author within 4 business hours or less, depending on the complexity and length of the document, in final format, and is typically accurately proofread for typographical error and grammatically correct.
- 2) Tracking systems for office documentation is generally updated as documents/requests are received and completed; or by COB on date of receipt with notation as to the status of the request/service.
- 3) Travel requests and vouchers are generally completed by COB on date of request when all relevant information has been provided by the requestor.
- 4) Typically, databases are updated as requests are made, but no later than 8 business hours after request is made.
- 5) Generally, updates to the office calendar are communicated immediately via Outlook calendar to affected employees, but no later than 3 business hours after update occurs.
- 6) Usually, time-keeping is completed every pay period to meet payroll deadlines.

PERFORMANCE PLAN AND APPRAISAL RECORD

Employee Name: _____	Date 10/01/06	Element No. <u>3</u> of <u>4</u>
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Critical Element and Objective

Organizational Effectiveness: Conduct internal office responsibilities in a manner which contributes to making it an effective, well-functioning and productive organization.

Weighting Factor (The weight for each element should reflect the significance within the framework of the Department's or bureau's organization goals. Weights should not be assigned based on the percentage of time an employee spends working on that element.) <u>Enter the weight for this element in the adjacent box.</u> →	Element Weight
	20

Results of Major Activities: Identify results that need to be accomplished in support of the performance element. A minimum of 3 and a maximum of 6 measurable results must be listed.

1. Written records of Office of Business Development staff meetings are typewritten and filed to include any decisions made at the meeting and followed-up on with either email, Outlook, or memordanda to the Supervisor.
2. Incoming correspondence is monitored and disseminated.
3. The Office of Business Development staff is informed of administrative work-related requirements, deadlines and procedures, and gives analytical input into the development of new work processes to improve the Office's efficiency.
4. Regular status reports on the Office of Business Development tasks and activities are produced.
5. Departmental administrative work methods, procedures and practices are kept current and applied to improve the Office's effectiveness.

Criteria for Evaluation: Supplemental Standards are required for each element and must be defined at Level 3 performance in terms of quality, quantity, timeliness, and/or cost-effectiveness. Attached Generic Performance standards also apply.

1. Generally, work assignments are completed by the assigned due date.
2. Incumbent provides quarterly updates to OBD staff on new administrative practices/processes.
3. Incoming correspondence is regularly tracked for due dates; alerts responder of the impending due dates when correspondence is delivered and also 24 hours in advance of response due date.
4. Work procedures are generally thoroughly documented if outside of the DOC standard operating procedure for administrative processes.
5. Status reports are typically updated when new information is acquired and reports are disseminated to staff on a weekly basis.

PERFORMANCE PLAN AND APPRAISAL RECORD

Employee Name: _____

Date 10/01/06

Element No. 4 of 4

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Critical Element and Objective

Business Acumen: To improve the entrepreneurial approach to decision making, business relationships, and to possess a thorough understanding of the mission of the MBDA.

Weighting Factor (The weight for each element should reflect the significance within the framework of the Department's or bureau's organization goals. Weights should not be assigned based on the percentage of time an employee spends working on that element.) **Enter the weight for this element in the adjacent box.→**

Element Weight
15

Results of Major Activities: Identify results that need to be accomplished in support of the performance element. A minimum of 3 and a maximum of 6 measurable results must be listed.

- 1) Facts and ideas are communicated using business terminology, an understanding of MBDA's strategic direction and its mission as observed by the supervisor.
- 2) Interpersonal skills are applied to communications and relationships with internal and external stakeholders.
- 3) Continuous quality improvement methods, techniques and practices are applied to existing or new services and products.

Criteria for Evaluation: Supplemental Standards are required for each element and must be defined at Level 3 performance in terms of quality, quantity, timeliness, and/or cost-effectiveness. Attached Generic Performance standards also apply.

- 1) Typically, communications are clear, defined, factually accurate and reflect MBDA's mission, goals and objectives as observed by the client.
- 2) Generally, relationships with internal and external clients are professional and productive inducing customer confidence as observed by the Supervisor.
- 3) At least 2 quality improvement projects are completed within the performance period.

Employee Name: _____			
PERFORMANCE SUMMARY RATING			
<ul style="list-style-type: none"> • List each element in the performance plan. • All elements are critical. • Assign a rating level for each element: <ul style="list-style-type: none"> (5) Level 5 (highest level of performance; (4) Level 4; (3) Level 3; (2) Level 2; (1) Level 1 (unacceptable performance) • Score each element by multiplying the weight by the rating level. • Interim ratings should be considered when you prepare the final summary rating. • After each element has been scored, compute the total point score by adding the individual scores. • Rating officials must provide either an overall narrative justification of the summary rating or a written justification for each element rating. • A written justification is required for any element rated below Level 3. 			
Performance Element	Individual Weights (Total must equal 100)	Element Rating (5, 4, 3, 2, 1)	Score
Customer Service	35		0
Office Operations	30		0
Organizational Effectiveness	20		0
Business Acumen	15		0
TOTAL SCORE			0
PERFORMANCE RATING			
<input type="checkbox"/> Level 5 (470 – 500) <input type="checkbox"/> Level 4 (380 – 469) <input type="checkbox"/> Level 3 (290 – 379) <input type="checkbox"/> Level 2 (200 – 289) <input type="checkbox"/> Level 1 (100 – 199)			
Rating Official's Signature/Title			Date
Approving Official's Signature/Title			Date
Employee's Signature (indicates appraisal meeting held)		Employee comments attached?	Date
		<input type="checkbox"/> Yes <input type="checkbox"/> No	
PERFORMANCE RECOGNITION			
<input type="checkbox"/> Performance Award \$ 20 _____ (15 %) <i>Appropriation Code</i> _____ <input type="checkbox"/> QSI (Level 5 Required)			
Rating Official's Signature/Title			Date
Approving Official's Signature/Title			Date