All Redacts are (b)(6)

Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees

Employee Name: [redacted]

Position: Financial Management Specialist, GS-0501-12

Organization: BR3L

Main Appraiser [redacted]

Date Developed: [redacted]

Date Issued: [redacted]

Critical Element: Financial Analysis/Realty Transactions-budget execution(25%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Consistently and timely verifies pre-val with supporting documents, ensures proper budget execution and uses judgment to determine when to escalate issues/concerns	Does not meet performance expectations as defined in Level 3	Partially meets performance expectations as defined in Level 3	Timely and accurately verifies pre-val with supporting documents, ensures proper budget execution and updates projects in Galaxy Uses judgment to determine when to escalate issues/concerns	Meets and often exceeds performance expectations as defined in Level 3	Meets and consistently exceeds performance expectations as defined in Level 3	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

Critical Element: Financial Analysis/Realty Transactions-lease payment(30%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Consistently and timely reviews lease transactions, ensures proper lease process (including accrual, reconciliation and open item reviews) and uses judgment to determine when to escalate issues/concerns	Does not meet performance expectations as defined in Level 3	Partially meets performance expectations as defined in Level 3	Timely and accurately reviews/approves lease transactions and reviews other areas as appropriate such as accruals, reconciliations and lease open item Uses judgment to determine when to escalate issues/concerns	Meets and often exceeds performance expectations as defined in Level 3	Meets and consistently exceeds performance expectations as defined in Level 3	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

Critical Element: Internal and/or External Customer Relationship Management(25%)

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Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees

Employee Name: (b) (6)

Position: Financial Management Specialist, GS-0501-12

Organization: BR3L

Main Appraiser: (b) (6)

Date Developed: (b) (6)

Date Issued: (b) (6)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Builds rapport and working relationship with colleagues (within division) and customers (within region, CO, Finance Center and contractors/independent reviewers), consistently and timely provides services and products to them, anticipates their needs	Does not meet performance expectations as defined in Level 3	Partially meets performance expectations as defined in Level 3	Builds rapport and working relationship with colleagues (within division) and customers (within region, CO, Finance Center and contractors/independent reviewers), timely provides services and products to them, anticipates their needs and ensures coverage and continuity of work	Meets and often exceeds performance expectations as defined in Level 3	Meets and consistently exceeds performance expectations as defined in Level 3	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

Critical Element: Internal Process Improvements and Special Projects(20%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Provides recommendations for improvements and identifies best practices and lessons learned Consistently and timely attends relevant meetings and	Does not meet performance expectations as defined in Level 3	Partially meets performance expectations as defined in Level 3	Provides recommendations for improvements and identifies best practices and lessons learned Timely attends relevant meetings and conference calls Demonstrates ability to problem solve and complete other projects timely	Meets and often exceeds performance expectations as defined in Level 3	Meets and consistently exceeds performance expectations as defined in Level 3	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

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Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees

Employee Name: (b) (6) [redacted]

Position: Financial Management Specialist, GS-0501-12

Organization: BR3L

Main Appraiser: (b) (6) [redacted]

Date Developed: (b) (6) [redacted]

Date Issued: (b) (6) [redacted]

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
		conference calls Demonstrates ability to problem solve and complete other projects timely						

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