ARMY DEFENSE CIVILIAN INTELLIGENCE PERSONNEL SYSTEM

INTEGRATED PERFORMANCE DEVELOPMENT SYSTEM

CHANGE IMPLEMENTATION PLAN

Calendar Years 2025 & 2026

Headquarters, Department of the Army
DCS, G-2

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1. Background

Several years ago, the Undersecretary of Defense for Intelligence and Security (USD(I&S)) began a multi-year phased approach to modernizing performance management in alignment with DoD Civilian Intelligence Workforce's recognition, career development, and evaluation approach. The initial approach to modernization was through a pilot program spearheaded by the National Security Agency called Talent Evaluation and Advancement (TEA). Since the successful piloted implementation of TEA, USD(I&S) directed Defense elements within the Intelligence Community (IC) transition to a new performance management system which resembled TEA. The new performance management system called the Integrated Performance Development System (iPDS) will encompass a 2-tier (binary) performance summary level and will align to enterprise priorities. The following core tenets will be incorporated to ensure enterprise consistency while enabling Army to meet the needs of our workforce and organizational culture: Integrate talent management process that recognize the inherent correlation between development, recognition, and evaluation; Strengthen performance culture across every component and the enterprise; Empower employees to take a more active role in their careers; Enhance equity and transparency; and Reduce administrative burden. To comply with this USD(I&S) initiative, Army will transition all Defense Civilian Intelligence Personnel System (DCIPS) employees into the iPDS through phased implementation no later than 1 January 2026. This document outlines the Army's transition to iPDS.

2. Key Program Changes to Performance Management

Organizational Goals: Organizational Goals will replace individual SMART objectives. Goals are set at a level that make sense within an organization (e.g., branch, division, team, etc.). Employees will not be evaluated on the attainment of these goals but rather their contributions toward them. Development and career growth plans (e.g., IDPs) will be aligned with organizational goals.

Individual Employee Developmental Goals: Incorporates individual employee development into plans and discussions. Developmental goals are aligned with both individual and mission needs and identified learning and growth areas relevant to employee's role and current skill/capacity level; and support an employee's individual career aspirations.

Ongoing Engagement & Mandatory Quarterly Check-Ins: Quarterly Check-Ins will be mandatory under iPDS. On a quarterly basis, supervisors and employees will be required to document that a Quarterly Check-In was completed. These Check-

Ins replace the Midpoint Review and End of Year Appraisal counseling. Employees and supervisors may choose to provide a **brief summary** under the Performance Objective tab of the employee's performance, development, and accomplishments or simply state "Met performance expectations" (<u>no lengthy narratives</u>!).

<u>Binary Ratings</u>: The current DCIPS 5-point rating scale is eliminated in favor of a 2- point binary rating system of "Met" or "Did Not Meet." Continuous feedback and quarterly check-ins will eliminate the requirement for formal write-ups at the end of the performance year and the required self-report of accomplishments.

<u>Performance Cycle</u>: All Army DCIPS organizations will transition from a fiscal year (FY) performance cycle to a calendar year (CY) performance cycle in either FY25 or FY26 as outlined in the below timeline. Employees starting a new position with fewer than 90 calendar days remaining in the Performance Cycle will have an extended initial performance cycle; these additional calendar days are added to/documented in the next Performance Cycle.

3. Timeline

Army DCIPS employees will transition to iPDS through phased implementation no later than 1 January 2026.

  a. <u>Phase 1</u>: Effective 1 October 2024. Phase 1 will serve as a pilot within Army which includes both Headquarters, U.S. Army Intelligence and Security Command and the National Ground Intelligence Center. The initial performance cycle will run 1 October 2024 through 31 December 2025. The 3 additional months (October through December) were added to the current performance cycle to ensure that no Army DCIPS employee transitioning to iPDS during phase 1 pilot have any unrated period of performance. Once the transition year is completed, phase 1 employees will revert to a regular iPDS 12-month CY performance cycle starting 1 January 2026 and ending 31 December 2026.

  b. <u>Phase 2</u>: Effective 1 January 2026. Phase 2 will include all remaining Army DCIPS employees not covered in phase 1. The initial performance cycle of iPDS for phase 2 employees will run from 1 January 2026 through 31 December 2026.

4. Performance Plan

The iPDS DCIPS performance plan is referred to as an Employee Performance Development Plan (EPDP). The EPDP documents organizational goals (Performance goals) and individual employee development goals, both of which align with Command mission needs and strategic priorities. Supervisors will place employees under an approved

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EPDP no later than 30 days from the beginning of the performance cycle (1 January). The performance plan will include:

- 2-6 Organizational Goals aligned to mission, vision, and priorities

- 1 or more Developmental Goals

- IC Performance Elements (Standard Behavioral Elements – unchanged from legacy DCIPS performance management). See Appendix C.

- Supervisor, Reviewing Official approval and Employee Acknowledgement

All DCIPS employees, assessment officials, and reviewing officials of Army DCIPS employees will utilize the automated DCIPS Performance Appraisal Application (PAA) when completing each phase of the DCIPS performance management process under iPDS. The current DCIPS PAA will be modified via a number of manual workarounds for iPDS use by the assessment official.

(1) Establishment of organizational goals, establishment of a developmental objective, the three mandatory check-ins, and the performance appraisal forms are all completed in the PAA tool.

(2) The assessment official is generally the immediate supervisor. However, in unusual circumstances in which assessment official responsibilities are assigned to an official in the chain of supervision above the immediate supervisor, the supervisor will be responsible and accountable for collaborating with the assessment official in his or her performance management responsibilities.

(3) A close-out performance evaluation is not required if the assessment official or employee departs less than 90 days into the performance cycle. However, annotation of the employee's performance should be documented and submitted to the gaining supervisor for inclusion in the final rating.

(4) A close-out performance evaluation is required for assignments 90 days or longer and will be completed within the automated DCIPS PAA tool. Reasons for close-outs include: the employee leaves the position, or organizational goals change.

(5) A DCIPS early annual performance evaluation is required if an assignment is 90 days or longer, if the employee leaves the position within the last 90 calendar days prior to the end of the performance cycle, or if the

employee will no longer perform under the currently assigned organizational goals. The performance evaluation will be completed within the automated DCIPS PAA tool.

5.   Evaluating and Documenting Performance Progress

There are four mandatory quarterly check-in's under iPDS. During these 4-mandatory quarterly discussions, supervisors evaluate employee progress toward, contributions to, and behavioral competencies in achieving performance and development goals as defined in the EPDP for the Performance Cycle. Each mandatory quarterly check-in is an opportunity to identify those employees who are not meeting expectations as defined in the EPDP. Narrative should be limited, noting whether the employee is or is not making progress against performance expectations. Supervisors will document within the PAA tool that the conversation took place with the employee (creating four quarterly check-in's under "midpoint" section of the PAA tool).

Quarterly Check-in #1 --NLT 30 April
Quarterly Check-in #2 --NLT 31 July
Quarterly Check-in #3 --NLT 31 October
Quarterly Check-in #4 (final Met/Did Not Meet)-------NLT 31 January

6. Performance Evaluation Ratings

<u>Met Performance Standards</u>. All "met" ratings will be annotated as a numerical rating of 3. This rating indicates that the employee's achievements and behaviors exhibited in achieving performance and development goals as defined in the EPDP for the Performance Cycle were work-level appropriate and commensurate with employee's scope of responsibility and influence.

<u>Did Not Meet Performance Standards</u>. All "did not meet" ratings will be annotated as a numerical rating of 1. This rating indicates that the employee's achievements and behaviors exhibited in working toward performance and development goals as defined in the EPDP for the Performance Cycle were not work-level appropriate or commensurate with employee's scope of responsibility and influence. When assigned as the overall performance evaluation rating for the Performance Cycle, this also indicates that performance deficiencies were not mitigated through the Opportunity Improvement Plan (OIP).

No other numerical ratings are authorized under iPDS (e.g. 5, 4, or 2). Assessment officials will modify the use of the PAA and not utilize numerical values other than "3" (Met) or "1" (Did not Meet).

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7. Addressing Poor Performance

Supervisors will address performance issues as soon as they are identified. The first step of notifying the employee includes noting at the next quarterly check-in that the employee is not on track to meet expectations as defined in the EPDP. Supervisors will provide guidance and coaching to support the employees with getting their performance aligned with expectations. Employees will not receive a final evaluation of "Did not Meet" without having an opportunity to mitigate the poor performance through a formal Opportunity to Improve Plan (OIP) which must be done in coordination with the servicing DCIPS Civilian Human Resources Service Center.

8. Recognizing Accomplishments

In FY22, the Department of the Army (DA) transitioned to a new awards and recognition process for Army Defense Civilian Intelligence Personnel System (DCIPS) employees. This new process provided greater flexibility for DA organizations who have DCIPS employees to affirm outstanding employee contributions, impacts, and achievements in a meaningful and timely manner with monetary and non-monetary awards and recognition. Since FY22 supervisors now seek opportunities to award and recognize employees whose contributions have impacted the organization. Supervisors are instrumental in ensuring individuals and/or teams are recognized for progress toward, contribution to, and behavioral competencies in achieving performance and development goals in an equitable, consistent, timely, transparent, and meaningful manner throughout the Performance Cycle. Awards and recognition may be monetary or non-monetary in accordance with the DCIPS Awards and Recognition Transition Plan which may include Special Act Awards, Time-Off Awards, On-the-Spot Awards, and Honorary Awards. Additionally, employees who meet expectations may be considered for a DCIPS Salary Increase (DSI) based upon transformative impact (see Appendix D).

9. DCIPS Performance Management (Integrated Performance Development System) Change Communication Plan

Management of the DCIPS iPDS will be at the organization G-1/J1 approval level with overarching oversight by the organization Transition Manager and organization Change Management Officer designated within the organization G-1/J1 or organization G-2/J2. The organization Change Management Officer will publicize this new performance recognition program through Town Halls, training sessions, Senior Civilian meetings, and other acceptable forums. In addition, each DCIPS supervisor will communicate with their employees as the new processes are implemented. See Appendix B, Roles and Responsibilities, for additional information.

10. Training

Army DCIPS will plan and manage its training transition plan based on DCIPS policy and any applicable exceptions/waivers documented in writing by the USD(I&S) and or the Under Secretary of Defense for Personnel and Readiness and aligned with DCIPS Army Policy Volumes. Each organization G1/J1 and organization G2/J2 DCIPS representatives, in conjunction with their DCIPS servicing Civilian Human Resources Service Center, will be responsible for ensuring their supervisors of DCIPS employees are aware of the transition of the new DCIPS iPDS and its processes. Army G-2 will supplement DoD and Army DCIPS performance management policies by creating generic Army specific iPDS training needed to transition from the legacy DCIPS performance management to DCIPS iPDS. The goal is to meet all DCIPS iPDS training needs of the workforce and accomplish all DCIPS iPDS training through train-the-trainer (T3) pushed down from Army G-2 to the organization Transition Managers. Organization Transition Managers are responsible for further providing Instructor Led Training (ILT) or T3 training to their respective DCIPS employees and supervisors of Army DCIPS employes using the training material provided. Training resources on DCIPS Performance Management program and Army's transition to DCIPS iPDS are available at: https://www.dami.army.pentagon.mil/site/dcips/LC-ER%202011.aspx

<u>Appendices</u>

Appendix A

Glossary

Terms

DA   Department of the Army

DCIPS Defense Civilian Intelligence Personnel System

DIE   Defense Intelligence Enterprise

DSE   Defense Security Enterprise

DSI   DCIPS Salary Increase (old DQI)

EPDP Employee Performance Development Plan

JDA   Joint Duty Assignment

IC   Intelligence Community

ILT   Instructor Led Training

iPDS   Integrated Performance Development System

TIN   Transformative Impact Nomination

OIP   Opportunity Improvement Plan (old PIP/IP)

PBSI   Performance-based Salary Increases

T3   Train-the-Trainer

TIN   Transformative Impact Nomination

Definitions

Assessment Official. As the DCIPS employes' supervisor or second line supervisor and is accountable for defining and communicating the strategic direction and expectations of the team. They are responsible for efficiently overseeing the performance and development of assigned teams' and individual employes.

Change Management Officer. Individual(s) appointed by their organization via HQDA Tasker HQDA-250103-DC5C. (See Appendix B, Responsibilities)

Integrated Performance Development System (iPDS). A system for evaluating and documenting employee performance within the DCIPS. The iPDS deliberately links the implementation of performance, development, and recognition for the management of the DCIPS workforce. This is a future focused performance development system that transitions from evaluating past behaviors to deliberately developing employees in alignment to current and future mission needs.

Employee Performance Development Plan (EPDP). The EPDP is part of the annual performance planning process for employees' occupation/work-role (work expectations) that outlines performance goals; development goals with action plan; tracks check-in sessions; and captures end of performance cycle assessment. A document prepared jointly by the employee and supervisor.

Met/not met standards. A management-approved expression of the performance threshold(s) requirement(s), or expectations(s) that must be met to be appraised at a particular level of performance.

Transformative Impact. The culmination of an individual's sustained performance and exhibited behaviors (personal leadership, collaboration, critical thinking, and intellectual curiosity) over a performance cycle with performance accomplishments that result in impactful outcomes that support organizational priorities.

Transition Manager. Individual(s) appointed by their organization via HQDA Tasker HQDA-250103-DC5C. (See Appendix B, Responsibilities)

Appendix B

<u>Roles and Responsibilities</u>

1. <u>Supervisor</u>

   a. Recognize employees timely and meaningfully

   b. Connect employee growth to organizational goals

   c. Evaluate employee performance in alignment to standards

   d. Demonstrate values and behaviors aligned to DCIPS standards

   e. Craft thoughtful approaches to developing, planning, and evaluating

   d. Provide consistent and actionable feedback and coaching to employees

2. <u>Employee</u>

   a. Deliver feedback (actively engage) in performance process

   b. Demonstrate values and behaviors aligned to DCIPS standards

   c. Provide meaningful input during development and performance discussions

   d. Engage in consistent dialogue with supervisor to discuss progress against expected outcomes and discuss exposure and development opportunities

3. <u>Transition Managers</u>

   a. Prepare for and facilitate the transition of DCIPS legacy 5-tier performance management to iPDS binary performance management

   b. Implement the Transition Strategic Change Management and Communication plan within their respective organization

   c. Implement the Transition Training Plan within their organization

   d. Provide Project Management Office functions to help facilitate and align all the work stream activity which must occur in a coordinated fashion, if the transition to iPDS is to happen smoothly and with minimal disruption to the workforce

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4. <u>Change Management Officer</u>. Advocate and promote the transition message. Change Management Officers will be at all levels: senior leadership (DISL, DISES, and Senior Intelligence Officers), and Supervisors.

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Appendix C

Defense Intelligence and Security Performance Behaviors *

All employees in DCIPS positions, regardless of role, are assessed on five Defense Intelligence Enterprise (DIE)/Defense Security Enterprise (DSE) standard behavioral competencies (i.e., the "how" of work outcomes). Supervisors' behavioral standards also include additional competencies reflective of Supervisors responsibilities, scope, and influence in leading the work of the organization, including compliance with DCIPS iPDS requirements. These aspects of an employee's performance are captured in the EPDP and should be used to guide individual development.

      a. Communication. DCIPS employees are expected to effectively comprehend and convey information with and from others in writing, reading, listening, and verbal action. Employees are also expected to use a variety of media in communicating and making presentations appropriate to the audience. In addition, DCIPS supervisors and managers are expected to use effective communication skills to build cohesive work teams, develop individual skills, and improve performance.

      b. Critical Thinking. DCIPS employees are expected to use logic, analysis, synthesis, creativity, judgment, and systematic approaches to gather, evaluate, and use multiple sources of information to effectively inform decisions and outcomes. In addition, DCIPS supervisors and managers are expected to establish a work environment where employees feel free to engage in open, candid exchanges of information and share diverse points of view.

      c. Engagement and Collaboration. Provide information and knowledge to recognize, value, build, and leverage diverse collaborative networks of coworkers, peers, customers, stakeholders, and teams, within an organization and/or across the DIE/DSE to achieve results. Supervisors, managers, and senior officers are expected to create an environment that promotes engagement, collaboration, integration, and the sharing of information and knowledge.

      d. Personal Leadership and Integrity. DCIPS employees are expected to demonstrate personal initiative and innovation as well as integrity, honesty, openness, and respect for diversity in their dealings with coworkers, peers, customers, stakeholders, teams, and collaborative networks across the DIE/DSE. DCIPS employees are also expected to demonstrate core organizational and IC values, including selfless service, a commitment to excellence, and courage and conviction to express their professional views and to constructively address or seek assistance to properly address concerns related to the protection of classified information in accordance with Executive Order (E.O.) 13526.

      e. Technical Expertise. DCIPS employees are expected to acquire and apply the knowledge, subject matter expertise, tradecraft, or technical competence necessary to achieve results. Use knowledge that is acquired through formal training or extensive on-the-job experience to perform one's job; work with, understand, and evaluate

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technical information related to the job; advise others on technical issues. This includes the proper handling and protection of classified information.

f. Supervisors and Managers performance behaviors shift from the behaviors inherent in non-supervisory positions to those required of supervisors and managers responsible for leading the work of the organization, including compliance with DCIPS integrated performance development system requirements and the execution of other responsibilities in support of the DCIPS workforce and human capital management. The behavioral aspect for Supervisors is to:

(1) Exhibit leadership and integrity, the same individual personal leadership behaviors as all DIE/DSE employees. Supervisors and Managers are expected to: Achieve organizational goals and objectives by creating shared vision and mission within their organizations.

(2) Establish a work environment that promotes equal opportunity, integrity, diversity (of both persons and points of view), critical thinking, collaboration, protection of classified information in accordance with E.O. 13526.

(3) Share information; mobilize employees, stakeholders, and networks in support of their objectives; and recognize and reward individual and team excellence, enterprise focus, innovation, and collaboration.

(4) Support protection of whistleblowers by responding constructively to any employees who make protected disclosures; taking responsible and appropriate actions to resolve such disclosures, if any; and creating an environment in which employees feel comfortable making such disclosures.

(5) Possess the technical proficiency in their mission area appropriate to their role as supervisor or manager.

(6) Plan, acquire, organize, integrate, develop, and prioritize human, financial, material, information (including classified), and other resources to accomplish their organization's mission and objectives.

(7) Focus on the development and productivity of their subordinates by setting clear performance expectations.

(8) Provide ongoing coaching and feedback, constructively addressing or seeking assistance to properly address concerns related to the protection of classified information in accordance with E.O. 13526.

(9) Evaluate the contributions of individual employees to organizational result, and link performance ratings and rewards to accomplishments of those results.

* In compliance with Executive Order dated 20 January 2025, where Diversity, Equity, Inclusion and Accessibility (DEIA) appears in any pre-populated behavioral standards, then the standard should be rated excluding DEIA duties and functions performed over the performance cycle while OUSD(I&S) revises language.

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Appendix D

Transformative Impact Standard & Criteria by Work Level *

Transformative Impact: The standard for which employees will be measured for Is the culmination of an individual's sustained performance and exhibited behaviors (personal leadership, collaboration, critical thinking, and intellectual curiosity) over a performance period with performance accomplishments that result in impactful outcomes that support organizational priorities.

Expert: Employee set a new standard by revolutionizing business processes, capabilities, products, or services that advanced IC/DoD-level strategic initiatives. Employee delivered enduring results through sustained performance and personal leadership, including inspiring curiosity and humility, fostering a learning culture, championing openness and respect in communications and collaboration, and influencing across Defense Components to enact a shared vision.

Senior: Employee set a new standard by developing new business processes, innovating capabilities, products, or services that advanced Component-level strategic priorities. Employee delivered enduring results through sustained performance and personal leadership, including encouraging curiosity and sharing of ideas and lessons learned, role modeling openness and respect in communications, and engaging and collaborating across organizations to enact a shared vision.

Full Performance: Employee set a new standard by substantially contributing to or developing new business processes, capabilities, products, or services that advanced organizational strategic goals. Employee delivered enduring results through sustained performance and personal leadership, including demonstrating curiosity and sharing knowledge and lessons learned with others, communicating with respect and openness to alternative points of view, and engaging and collaborating across the organization to address priorities.

Entry/Developmental: Employee set a new standard by advancing processes, capabilities, products, or services that contributed to achievement of organizational strategic goals. Employee will deliver-enduring results through sustained performance and personal leadership, including demonstrating curiosity and a willingness to learn and share information, being open and respectful in communications, and collaborating with others on unit priorities.

* Subject to change. Additional information on process will be issued at a later date once finalized by USD(I&S)

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Appendix E

<u>Sample Notification</u>

This document establishes guiding principles for the Transition of Defense Civilian intelligence Personnel System Performance Management System to a new performance management system called the Integrated Performance development System (iPDS). IPDS will encompass a 2-tier (binary) performance summary level and will align to enterprise priorities and specially support the Department/Intelligence Community top priorities.

All DCIPS employees will transition into the iPDS effective 1 January 2026. A fundamental change of DCIPS iPDS is the performance cycle; it is aligned to the calendar year (CY) and not the fiscal year (FY) like our current performance cycle. To ensure no unrated period of performance during the transition, three additional months (1 October 2025 through 31 December 2025) will be added to the current FY25 performance cycle. Therefore, the current FY25 performance cycle under the legacy performance management system will encompass a 15-month evaluation. The adjustment to the performance plan end date from 30 September 2025 to 31 December 2025 will be made within to your current DCIPS performance plan by our organization's pay pool administrator prior to 1 July 2025.

Additional communications and training will be pushed out within the organization during the year regarding the anticipated implementation of iPDS. The following core tenets will be incorporated to ensure enterprise consistency and interoperability while enabling Army to meet the needs of our workforce and organizational culture: Integrate talent management process that recognizes the inherent correlation between development, recognition, and evaluation; Strengthen performance culture across every component and the enterprise; Empower employees to take a more active role in their careers; Enhance equity and transparency; and Reduce administrative burden.

Additional information concerning the differences between the legacy DCIPS performance management system to the new iPDS is provided at:
https://www.dami.army.pentagon.mil/site/dcips/LC-ER%202011.aspx

SIGNATURE OF SUPERVISOR

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Appendix F

<u>Frequently Asked Questions</u>

Overview of DCIPS iPDS

1. What is Performance Management Modernization/DCIPS iPDS?

The DCIPS Performance Management Modernization is a multi-year phased approach to modernize performance management in alignment with the DoD Civilian Intelligence Workforce's recognition, career development, and evaluation approach. This includes DCIPS performance management process for DCIPS employees at the grades of GG-15 and below, utilizing the integrated Performance Management Development System (iPDS). This effort will streamline DCIPS performance management program and keep the DCIPS in-line with the rest of the Intelligence Community (IC).

DCIPS iPDS includes four key tenets:

    a. Integrate talent management processes and emphasize the inherent relationship between development, evaluation, and recognition.

    b. Strengthen performance culture through employee performance and development plan alignment with organizational goals and providing timely recognition to reinforce the performance culture.

    c. Enhance equity and transparency by prioritizing employee development through consistent employee-supervisor engagement, streamlining the performance evaluation scale, and increasing the range of employee and team recognition to reinforce an innovative and inclusive work environment.

    d. Reduce administrative burden through the implementation of quarterly check-ins (at minimum) that enable ongoing employee performance evaluation, development, and recognition to grow inclusion and trust.

2. Why are we moving to DCIPS iPDS?

The decision to formally move forward with DCIPS iPDS came out of the DoD 2019 People Summit meeting. In 2015, the National Security Agency (NSA) became the first agency from the Office of the Under Secretary of Defense for Intelligence and Security (OUSD(I&S)) to implement pieces of performance management modernization (Met/Did Not Meet Performance Expectations) to their workforce. In the years following the NSA rollout, USD(I&S) held working groups with other DoD Intelligence and Security agencies to share information and benchmark key features and lessons learned.

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In FY21, as part of the iPDS transformation, we transitioned away from an allocation of 50% performance bonuses to 100% cash awards (e.g. Special Act or On-the-Spot) to promote timely recognition and a culture focused on innovative performance. Additionally, by leveraging increased funding to cash awards, managers are able to increase the frequently and quantity of awards throughout the performance cycle.

3. What will Performance Management Modernization look like on an annual cycle?

Performance Management Modernization will occur in four phases through DCIPS iPDS:

1. Plan and document performance development goals.

2. Monitor and develop performance throughout the performance cycle.

3. Review the progress against performance and development goals.

4. Recognize accomplishments during the performance cycle.

While generally sequential, these phases are not strictly time-bound; activities and deliverable within these phases are often interactive throughout the Performance Cycle.

4. When does Performance Management Modernization begin?

Performance Management Modernization began in FY22 with the implementation of 100% Cash Awards. On a phased schedule beginning in FY25/CY26, Army will transition from a five-point to a binary "met/did not meet expectations" rating scale.

5. When will we transition to met /did not meet rating scale?

The first cycle of met / did not meet performance expectations will occur from 1 October 2024 – 31 December 2025 (extended cycle as Army transitions to calendar year performance cycle). Beginning on 1 January 2026, the performance process will be a 12-month calendar year (CY) cycle.

6. What are the next steps for Performance Management Modernization?

The next step in the transition to a binary rating scale and the implementation of documented quarterly performance and development check-ins between supervisor and employees. ODCS, G-2 Intelligence Personnel Management Office will continue to provide additional performance modernization updates

and plans for implementation over the coming months.

<div style="background-color:#5b9bd5; color:white; text-align:center; font-weight:bold;">Monitoring and Developing Performance</div>

7. Will I still have a performance plan?

Performance plans will now be called Employee Performance Development Plans (EPDs) which combine features of the old Performance Plan and the Individual Development Plan (IDP) to form one integrated plan. Supervisors are responsible for evaluating an employee's performance and assigning a performance designation of met or did not meet performance expectations. Decisions are based on demonstrated performance and on-going conversations throughout the year.

The following table highlights Army's PM modernization current state and way ahead.

Current		Starting FY25
Fiscal Year	⇒	**Calendar Year**
Defense Civilian Personnel Data System (DCPDS) is utilized to conduct unclassified performance evaluations in Performance Appraisal Application (PAA)	⇒	**Defense Civilian Personnel Data System (DCPDS)** is utilized and existing tool modified to conduct unclassified performance evaluations in Performance Appraisal Application (PAA)
Five Point Rating Scale includes extensive narratives during the Midpoint Review and Final Evaluation process while evaluating employees based on numerical 5-point rating scale	⇒	**Binary Rating Scale** indicates an employee's performance as "Met" or "Did Not Meet" performance expectations. Reduces administrative workload during the entire performance cycle while promoting a more transparent and equitable performance culture.
Separate day-to-day Performance Management and DCIPS-required individual Development Plan	⇒	**Combined** performance and development goal setting, progress tracking, and assessment on new

(IDP) goal setting and assessment		Employee Performance Development Plan (EPDP).
Self-Assessment and Final Assessments where employees and rating officials are given 6,000 characters each and HLRs are given 3,000 characters to provide input for the final evaluation	⟫	**No employee self-assessment** written option required at the quarterly check-ins or final performance evaluation. **Assessment officials** should limit to 100 characters at quarterly check-ins and 200 characters/each for final evaluation
Midpoint Review Checkpoint requires one Assessment Official/Employee documented meeting and narrative to address progress against established objectives.	⟫	**Quarterly "Check-in" Meetings** implements continuous feedback throughout the performance cycle to strengthen employee and supervisor relationship.
Performance Management Performance Review Authority (PM PRA) provides a holistic review of final evaluations to ensure consistency and participates in employee career - development process	⟫	**Re-imagined PM PRA** provides a comprehensive review of high-performing employees and recommends actions for performance management, career development decisions, and Transformative Impact.

8. What is included on the Employee Performance Development Plan (EPDP)?

The Employee Performance Development Plan (EPDP) documents performance goals and individual employee development goals, which align with Army's mission needs and strategic priorities. In addition, the EPDP includes a developmental goal action plan, as well as signature requirements for assessment officials to document each quarterly check-in. Assessment officials are also required to document strengths and areas of focus for continue development and growth and assigns a rating of met or did not meet

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performance expectations at the end of the performance cycle. Reviewing Officials review, concur/non-concur and sign, and employees will sign for acknowledgement.

9. Will plans still include performance elements?

The IC performance elements have been renamed to performance behaviors to emphasize "how" an employee accomplishes their goals. Associated standards will be included in the Employee Performance Development Plan (EPDP). While employees will not be rated numerically, adherence to performance behaviors will be a fundamental part of employee performance. If an employee is experiencing difficulty in any of these areas, assessment officials will identify any behavior in which the employee should pursue further development, which will then be incorporated into the EPDP and regular check-in discussions.

10. Who will be a part of the performance plan approval process?

The employee and assessment official will document quarterly check-ins and the reviewing official will conduct a final review and concur/non-concur of the EPDP at the end of the cycle.

11. Am I still required to complete a DCIPS Individual Development Plan (IDP)?

No. The DCIPS required IDP is being folded into the Employee Performance Development Plan (EPDP), so there will only be one required plan beginning in CY26.

12. If an employee stays in the same position but receives a new assessment official during a performance cycle, is a close-out required?
There are no more close-out evaluations with a few exceptions as noted in Q13. While a new form is not necessary under this circumstance, the employee should have an initial check-in conversation with the new assessment official to discuss the employee's goals and validate that they are still relevant.

13. When is a close-out required?
A close-out is required under certain circumstances when needed to document a denial of a Within-Grade Increase, or document the outcome of an Opportunity Improvement Plan. Close-outs are also required if organizational goals change due to mission realignment, promotion, or new assignment)

14. How do I change the performance year end date on a performance

plan within the Performance Appraisal Application (PAA) to reflect 31 December versus 30 September?

The DCIPS PAA tool was built for the legacy DCIPS performance management system which was on a FY rating cycle and does not permit either the employee or assessment official to change the end date beyond 30 September. As a workaround, the organization's Pay Pool Administrator must perform this change manually for each DCIPS employee within their assigned Pay Pool Identifier via their system accesses to "DCIPS Appraisal Administrator function" found within their respective account access "Civ Pay Pool Administrator" or "Civ Alternate Pay Pool Administrator" functionality within the My Biz navigator. This work-around is required annually until the DCIPS PAA tool is replaced.

Joint Duty Assignments (JDAs)

15. Will employees out on JDA be required to complete an Employee Performance Development Plan (EPDP)?

Yes. Employees operating under the DCIPS graded structure detailed to another IC or DoD Component under a joint duty assignment (JDA) will be required to complete an EPDP with their JDA leadership to document for the record. Gaining organizations will use the forms and performance management policy of the home organizations. Where system used by the home organization to document the EPDP are not accessible to the gaining organization, the gaining organization will provide input to the home organization assessment official needed to create, approve, and communicate the EPDP.

Check-in Conversations

16. What is a check-in conversation?

Check-in conversations are future-focused, strength-based conversations about employee work and priorities and must occur at least quarterly. They are an opportunity for assessment officials and employees to clarify expectations and align priorities and outcomes around the employee's work and goals.

17. Are check-ins required?

Yes, quarterly check-ins are mandatory and documented in the Employee Performance Development Plan (EPDP) with a signature and date. While not required, assessment officials and employees can conduct check-in conversations more frequently that do not require documentation on the EPDP.

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18. How will feedback be documented?

Conversations are expected to take place throughout the performance cycle and assessment officials will be required to certify within the Employee Performance Development Plan (EPDP) that a quarterly check-in discussion was held with each of their employees. Through not required, reviewing officials can coordinate with assessment officials to provide quarterly feedback. At the end of the cycle, the reviewing official will be required to review, concur/non-concur, and sign the EPDP within the automated DCIPS PAA tool.

19. What if an employee disagrees with feedback received during a check-in?

If there is a disagreement, the employee should discuss with the assessment official to attempt resolution. If needed, the employee can request a reviewing official review to discuss respective feedback with the assessment official.

Evaluating and Documenting Performance

20. Is the 5-point rating scale replaced with a binary designation?

Yes, the binary rating scale of met / did not meet performance expectations is replacing the g-point rating scale. Numerical scores will not be included in an employee's performance report other than "3-Met" or "1-Did not Meet". Supervisors will provide feedback to employees during their end-of-year conversations using the documented goals in the Employee Performance Development Plan (EPDP) as the definition for "met" performance expectations.

21. What are the criteria for met / did not meet performance expectations ratings?

Met: This indicates that the employee's progress toward, contributions to, and behavioral competencies in achieving performance and development goals, as defined in the Employee Performance Development Plan (EPDP) for the Performance Cycle, were work-level appropriate and commensurate with employee's scope of responsibility and influence.

Did Not Meet: This indicates that the employee's progress toward, contributions to, and behavioral competencies in achieving performance and development goals, as defined in the Employee Performance Development Plan (EPDP) for the Performance Cycle, were not work-level appropriate, commensurate with employee's scope of responsibility and influence. When

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assigned as the overall performance evaluation of rating for the Performance Cycle, this also indicates that performance deficiencies were not mitigated through the Opportunity to Improve Plan (OIP).

22. Will I still complete an employee self-assessment?

No, there will not be a narrative as employees and assessment officials should maintain continuous dialogue throughout the year, to include their quarterly check-in conversations.

<div align="center">Awards</div>

23. What will be the role of the Performance Review Authority (PRA)?

The role of the PRA will be refocused on assessing Transformative Impact. The PRA previously provided a holistic review of final evaluations to ensure consistency and participates in employee career development processes. The PRA will now provide a comprehensive review of high-performance employees and recommend actions for performance management, career development decisions, and DCIPS Salary Increases (DSIs), further defined below, through demonstrated Transformative Impact.

24. How will employees be recognized under iPDS?

Employees may be recognized in multiple ways, including Special Act/Service Awards, Time-Off Awards, On-the-Spot Awards, and Honorary Awards. On a recurring basis, assessment officials should consider the contributions of all employees to determine if their achievements have sufficiently advanced organizational goals to merit an award. Awards should be timely to the employee's achievement or exemplify results. In addition, though not an award, employees can be recognized for a performance-based DCIPS Salary Increase (DSI) through demonstrating Transformative Impact.

<div align="center">Performance-Based Compensation</div>

25. Will DCIPS Quality Increases (DQIs)/Sustained Quality Increase (SQIs) still be awarded?

No. Employees that demonstrate transformative impact will be eligible for a DCIPS Salary Increase (DSI) which is a 1-step performance-based pay increase. DQIs and SQIs, under the legacy performance management system, were eliminated under DCIPS performance management modernization. The

DSI is similar to the DQI but is based upon Transformative Impact.

26 What is Transformative Impact?

Consistent with employee's DCIPS work level. Transformative Impact is appropriately recognized through a DCIPS Salary Increase (DSI) when an employee achieves extraordinary mission results in consideration of their work level and contributed in a remarkable manner that fostered collaboration, innovation, and inclusion.

As noted previously, with this updated process, DQI and SQIs will no longer be issued to employees. Separately, employees will continue to receive their within-grade increase (WGI) based on step and time-in-grade provide that their formally documented performance evaluation is at the satisfactory (met) level.

27. Who is eligible for Transformative Impact?

Employees must meet the following criteria to be eligible to receive Transformative Impact:

- Must achieve a met performance expectations end-of-year performance rating
- Assessment Official must nominate an employee as a top outstanding performer (Concurred by the higher level reviewer and required board/PRA concurrence)
- Not received a DCIPS Salary Increase (DSI) in the last 52 weeks
- Not recently promoted within last cycle

Supervisors should discuss these requirements with Army DCIPS employees as part of their check-in conversations to provide transparency in the process.

28. How will Army determine who demonstrates Transformative Impact?

Commands (ACOMs, DRUs, ASCCs, Administrative Assistant to the Secretary of the Army, HQDA G-2, and the Combatant Commands) will conduct an annual review of eligible employees through a nomination process that is being developed by USD(I&S). This process within Army is anticipated to mirror the current DCIPS pay pool deliberation process.

29. What is a DCIPS Salary Increase (DSI)?

DSI is a one-step equivalent base-pay salary increase at the employee's current

grade for employees that demonstrated Transformative Impact, Army must confirm employee meets basic eligibility and has not received a DSI within the preceding 52 consecutive weeks (within the same annual performance cycle).

30. When will DSIs be given?

CY26 DSIs will be paid out in 2027 and follow the same nomination and approval timeline each calendar year. The process for which an assessment official can nominate their employees for a DSI based upon Transformative Impact will be disseminated at a later date.

31. How will the process change for Within Grade Increases (WGIs) and Base-Pay Increase Monetary Awards (DCIPS Salary Increase (DSIs)?

Performance Management Modernization will not impact WGIs.

DCIPS Quality Increases (DQIs) will be **renamed** to DCIPS Salary Increases (DSIs). DSIs are earned by demonstrating Transformative Impact.

Note: The 2-step DCIPS Sustained Quality Increase (DCIPS SQI) is eliminated under Performance Management Modernization.

DSI Eligibility:

1. Must achieve a "Met" end-of-year DCIPS performance evaluation.
2. Rating chain must nominate employee as top outstanding performer.
3. Not received another Transformative Impact in the last 52 weeks.

32. Can an employee receive a DSI if they are at the federal pay cap or at step 12?

Employees could receive a DSI at the federal pay cap as long as they are not at a step 12.

33. Will an employee out on JDA be eligible for Transformative Impact?

Yes, JDAs will be eligible. Gaining organizations are responsible for completing providing input to the home organization in completing the Employee Performance Development Plans (EPDPs); likewise, the gaining organization is responsible for coordinating with the home organization and providing input in submitting Transformative Impact Nomination (TIN) if the gaining organization assessment official is able to provide justification.

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34. When will DCIPS Salary Increases (DSI) be issued?

DSI will be made effective during the February/March timeframe, guidance will be issued the ODCS, G-2 on a annual basis concerning process and timeline.

35. Will Army still issue DQIs/SQIs for FY25 performance?

Army will issue DQIs and SQIs for the FY25 cycle, but will transition to Transformative Impact processed through DCIPS Salary Increases (DSIs) for the CY26 cycle. The 2-step SQI was eliminated under Performance Management Modernization as we transition to iPDS.

36. Were DCIPS Quality Increases (DQIs) automatic in the past?

In previous cycles, DQIs were based on an employee's performance evaluation scores. Employees that received an evaluation in the upper 1-10% of the pay pool were considered for an DQI.

37. Will the Compensation Workbench (CWB) be used to code DSI's?

Yes. The CWB will still be used to code recipients of a 1-step DSI and flow the board results to the Civilian Human Resources Agency for processing.

Other

38. Will I still receive a Within-Grade Increase (WGI)?

Yes, these changes will not impact employee WGIs. Employee must have received a met performance expectations rating on their last Employee Performance Development Plan.

39. How will an Opportunity Improvement Plan (OIP) work?

Much like Improvement Plans (IPs), assessment officials will continue to work with Employee Relations to document issues with employee performance, including the initiation of an OIP. An employee must be on an OIP for the assessment official to assign a "did not meet" performance expectations rating.

40. Will supervisors/employees be trained on the new process?

HQDA ODCS G-2 will continue to provide dedicated sessions for Command Transition Managers to include train-the-trainer. The designated Command

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Transition Managers will be responsible for training the Army DCIPS workforce and supervisors of the Army DCIPS workforce within their respective command.

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Appendix G

<u>Workaround – How to Create an Employee Performance Development Plan using the o DCIPS Performance Appraisal Application Tool</u>

- o Open the PAA (https://compo.dcpds.cpms.osd.mil)

- o Click My Performance

- o Click Create Plan "Defense Civilian Intelligence Personnel System and click Go

- o Performance Cycle Date: End date beyond 30 September can only be changed by your organization's Pay Pool Administrator and must perform this change manually for each DCIPS employee within their assigned Pay Pool Identifier via their system accesses to "DCIPS Appraisal Administrator function". This workaround can be done by the respective person once the performance plan has been created and saved.

- o Confirm Rating Chain at Bottom and click "Create New Plan"

- o Click Performance Objectives tab and enter your Organizational Goals and Developmental Goal as depictive in the sample below.

- o Save each Goal, repeat as needed, and then send to Assessment (Rating) Official using the button "Transfer to Rating Official"

Sample:
  - ➢ Performance Objectives Title Need to Lead with "Organizational Goal #1, #2, #3, etc.
  - ➢ Developmental Objective Title Needs to Lead with "Developmental Objective".

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Appendix H

Workaround - Employee Step-by-Step Guide to DCIPS iPDS Quarterly Check-In's

o Open the PAA (https://compo.dcpds.cpms.osd.mil)

o Click My Performance

o Under Action, toggle to Update and click Go

o Click the Midpoint Review Tab

o Click Create Midpoint Review

o Within the Performance Objectives Assessment tab, scroll down to Employee Self-Assessment block

o If meeting expectations, enter "Meeting performance expectations" and transfer to your Assessment Official – no requirement for accomplishment narratives

o Acknowledge upon communication by Assessment Official

o Repeat for 2nd and 3rd Quarter Check-in's

o Check-Ins (see screenshot example)

o 4th Quarter & Final Evaluation. Follow Steps 1-3, Click Performance Evaluation tab, under Performance Objective tab simply state "Met performance expectations" or document primary accomplishments (no lengthy narratives!)

o Transfer to Assessment Official and Acknowledge upon communication

| Performance Plan | Midpoint Review | Performance Evaluation | Reports/Forms | Mock Pay Pool Info |

Midpoint Review

Need Help?

☑ **TIP** Midpoint Reviews are a review of an employee's performance which typically occurs midway through the performance cycle. (Note: Not a Closeout Assessment or Performance Evaluation)

Create Midpoint Review

Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action	Delete
1		23-Jan-2023		Completed	25-Jan-2023	Telephone	25-Jan-2023	View History	🗑
2		03-Feb-2023		Completed	08-Mar-2023	Other	08-Mar-2023	View History	🗑
3		30-May-2023		Completed	07-Jun-2023	Other	07-Jun-2023	View History	🗑

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Appendix I

Workaround
Assessment Official Step-by-Step Guide to DCIPS iPDS Quarterly Check-In's

- Open the PAA (https://compo.dcpds.cpms.osd.mil)
- Navigate to your direct reports, under Action select Update and Go
- Click the Midpoint Review tab
- Select the Update link for the selected quarterly check-in
- Within the Performance Objectives Assessments tab, scroll down to Rating Official Evaluation of Performance block
- If meeting expectations, enter "**Meeting performance expectations**" and select the Approvals and Acknowledgement tab
- Select the Start link and use Option B to approve and **skip HLR review** Enter the review date and method of review, select Save
- Repeat for 2nd & 3rd Quarterly Check-Ins
- **4th Quarter & Final Evaluation**: Follow Steps 1-3, Click Performance Evaluation tab, under Performance Objective tab simply state "**Met performance expectations**" or **document primary accomplishments** (**no lengthy narrative**s!)
- Rate Performance Goals and Performance Elements - if overall performance is determined as not meeting expectations provide a **rating of Unacceptable (1)** for all goals and elements; if employee's overall performance met expectations provide a **rating of Successful (3)**
- **Select the Approvals and Acknowledgement tab,** Select the Start link and use Option B to approve and **skip HLR review** Enter the review date and method of review, select Save
- Once the evaluation is approved, select the Performance Evaluation tab, select Approvals and Acknowledgements tab, select Start link in Step 3 and enter the communication date and communication method; save and transfer to the employee for acknowledgement

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