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27 JAN 1966

MEMORANDUM FOR: SF Career Service Competitive Evaluation
Panel

SUBJECT : SF Career Service Competitive Evaluation
Panels

1. The five-panels designated in 1965 to make competitive evaluations of SF Career employees will be replaced by one panel composed of the chiefs of the six operating Divisions and the Policy and Planning Staff. The Chairman will be selected by the panel from its membership at each meeting on a rotating basis. The Chief of Support will act as Executive Secretary for the purpose of calling meetings and preparing the agenda. [REDACTED] of the Support Staff will act as recording secretary for the panel.

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2. The panel will evaluate and prepare a separate listing by grade of all employees in grades 7 through 13. The panel in making its evaluations will prepare revised Form 2404 dated January 1966, in accordance with the attached instructions.

3. The panel will consider Fitness Reports, academic records, training records, previous assignments, commendations, meritorious promotions, records of previous employment, and other pertinent information which the Support Staff will make available. Senior Finance Officers outside the Office of Finance may be requested to make an informal preliminary evaluation of SF Career personnel under their supervision in order to provide the panel with more complete information on personnel who may not be known to the panel.

4. The panel is requested to complete their evaluation of all employees not later than 28 February 1966.

[REDACTED]

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/ R. H. FUCHS
Director of Finance

Attachment

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GROUP 1
Excluded from automatic
downgrading and
declassification

INSTRUCTIONS FOR COMPLETING SF CAREER SERVICE
BOARD COMPETITIVE EVALUATION LISTING
FORM 2404

PURPOSE OF FORM

The Competitive Evaluation Listing is designed for two purposes. First, to determine by a point system the competitive ranking of employees for use by the Career Service Board in considering promotions, and second, to provide an inventory of personnel showing the kinds and degree of skills they have to be used in making position assignments.

PREPARATION OF THE FORM

A separate listing will be prepared for each grade containing the names of all employees in the grade. Ratings and points will be given employees for the following elements:

SKILLS

Under each of the skills Budget, General Finance, Systems, and Audit, rate in column (a) the degree of skill demonstrated by the employee in his actual work performance, and in column (b) the degree of potential the employee is deemed to have in the skill ("H" High; "M" Medium; "L" Low; "O" None).

PERFORMANCE

Points will be given for performance in the duties assigned primarily during the last Fitness Rating reporting period. However, other reports may be considered. The points for an employee should fall within the range of 40 to 50 for the employee whose "Overall Fitness Rating" is "O"; 30 to 39 for "S"; 20 to 29 for "P"; 10 to 19 for "A".

POTENTIAL

Points will be given for the degree of overall potential that the employee is deemed to have. Potential in this context is intended to mean the indicated ability, by reason of education and demonstrated performance, to assume greater responsibilities and/or other duties. Points should be based on the ratings given for potential for each of the four skills Budget, General Finance, Systems, and Audit.

QUALIFICATIONS

Points will be given for qualifications resulting from education, training, related non-Agency work experience, and language ability. Points will be limited to 15 inasmuch as some of these qualifications will be considered in crediting points in potential.

FLEXIBILITY

Points will be given taking into consideration the degree to which the employee is limited in his flexibility by reason of capabilities, his personal desires, medical problems, and family situation, for rotational assignments both domestic and abroad. Five (5) points will be given for unlimited flexibility. "Unlimited Flexibility" is the employee's capability to be assigned and his sincere willingness to accept any assignment at any time, if the same conditions and personal circumstances which pertain at the time of indication, continue. Less points will be given to the degree that there is less actual capability and commitment.

LENGTH OF SERVICE

One point will be given for each approximate two years' service qualifying toward retirement, not to exceed 10 points.

OTHER CONSIDERATIONS

Points will be given for demonstrated skills, versatility, experience, and unique or special qualities not otherwise reflected in the above elements.

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SF CAREER SERVICE BOARD

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In compliance with [REDACTED] the SF Career Service Board was established with the Director of Finance as Head of the SF Career Service and the following Staff and Division Chiefs as members of the Board:

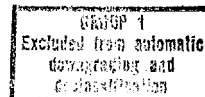
- | | |
|------------------------|---|
| Chairman | Deputy Director of Finance |
| Member | Chief, Support Staff |
| Member | Chief, Policy and Planning Staff |
| Member | Chief, Accounts Division |
| Member | Chief, Certification and Liaison Division |
| Member | Chief, Industrial Contract Audit Division |
| Member | Chief, Monetary Division |
| Member | Chief, Compensation and Tax Division |
| Member | Chief, Proprietary Systems and Accounts Div. |
| Member | Designee of Office of Planning, Programming and Budgeting |
| Administrative Officer | Non-voting - Provides technical advice and assistance to the Board. |

In the justified absence of one or more of the specified members, his deputy will attend. Meetings are held periodically upon call by the Chairman.

The mission of the SF Career Service Board is to direct SF Career Service Program within the Agency. It is responsible for the monitoring of the application and functioning of the personnel program as it applies to members of the SF Career Service including:

- (1) Improving and strengthening personnel administration within the SF Career Service;
- (2) Planning the utilization and development of such individuals, including their training, assignment, rotation, and advancement;

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- (3) Reviewing fitness reports of all SF personnel;
- (4) Planning the rotation and reassignment of such individuals to enable the SF Career Service to meet long range personnel requirements through orderly processes;
- (5) Reviewing requests for personnel actions to reassign, promote, demote or separate such individuals and recommending appropriate action to the Director of Personnel;
- (6) Furnishing certification to the Director of Personnel for approval of Personal Rank Assignments for SF personnel;
- (7) Furnishing certification to the Director of Personnel for approval of Qualify Step Increases for SF personnel;
- (8) Reviewing proposals for the training of such individuals and recommending their participation in Agency-sponsored training;
- (9) Selecting of SF Careerists for Executive and Mid-Career Development;
- (10) Reviewing competitive evaluation listings of SF personnel in Grades GS-7 through GS-13;

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(11) Recommending selection of SF personnel for

Career Employee Status ([REDACTED]); and

(12) Notifying Offices of Security, Personnel and

Medical Services when employees are nominated

for overseas assignment.

All SF employees in grades GS-7 through GS-13 are competitively evaluated annually. On or before 1 April each year, the Administrative Officer submits lists of SF employees by grade to the Competitive Evaluation Panel which is composed of Staff and Division Chiefs and PPB designee. These lists are reviewed individually by each member of the panel and their evaluations are then collectively reviewed at a Panel Board meeting where an overall evaluation of SF employees by grade is formulated on the basis of their performance, training, experience and potential in the four functional skills (Budget, General Finance, Systems and Audit). These lists then are submitted to the Chairman of the SF Career Service Board and are used in considering promotion of SF personnel in grades GS-7 through GS-13.

One of the reference materials used at each SF Career Service Board meeting is the Career Service Grade Authorization (CSGA) which is adjusted monthly to reflect any projected new or deleted SF positions, any non-SF personnel occupying SF positions, and any SF employees occupying non-SF positions. This report gives a complete headroom analysis which enables the Board to determine how many employees it can promote from one grade level to another.

Rotational assignments are also considered at the SF Career Service Board meetings.

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