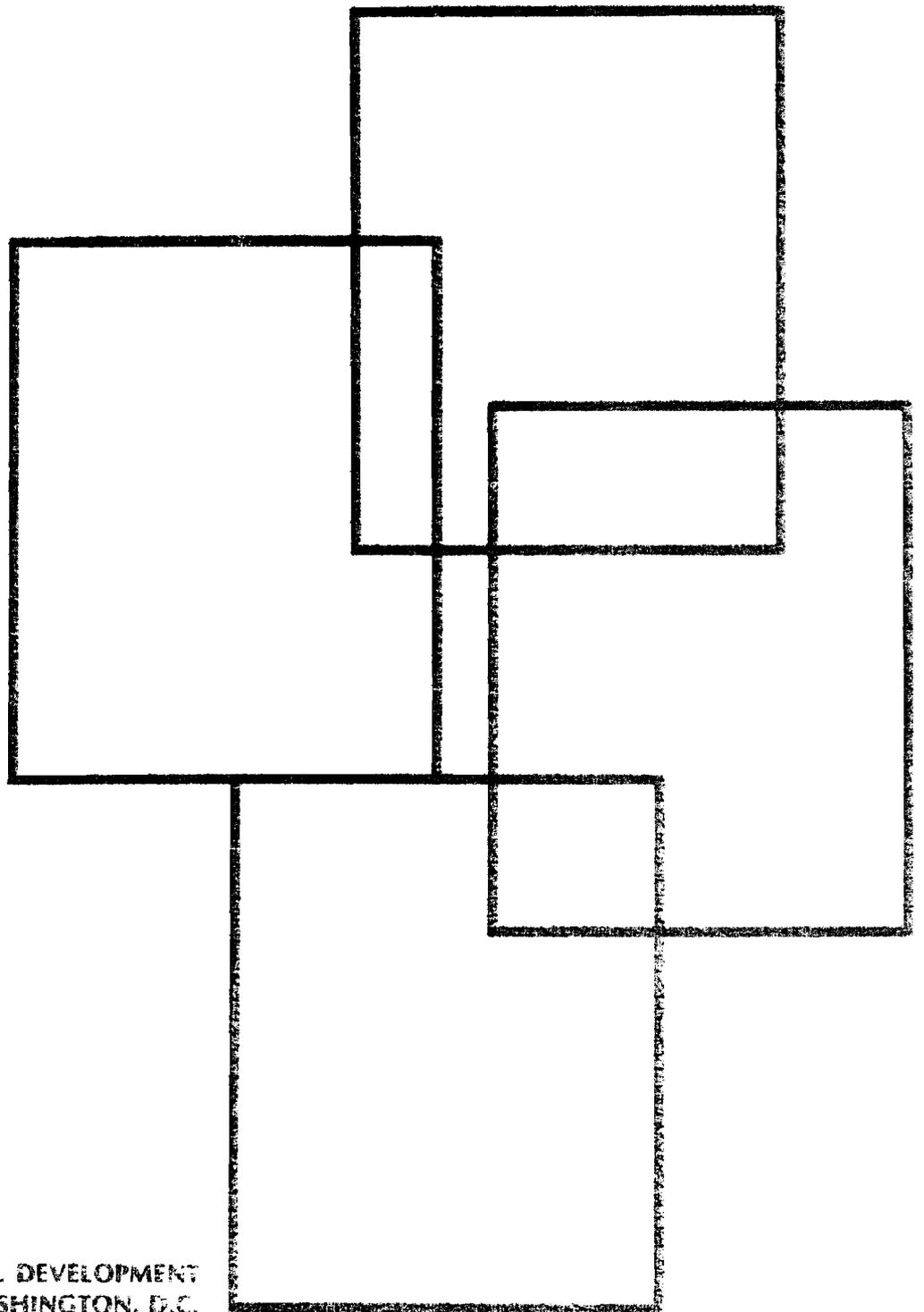


Training and Staff Development



AGENCY for INTERNATIONAL DEVELOPMENT
WASHINGTON, D.C.

AGENCY FOR INTERNATIONAL DEVELOPMENT

HANDBOOK TRANSMITTAL MEMORANDUM	DATE December 12, 1990	TRANS. MEMO NO. 28:50
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MATERIAL TRANSMITTED:

Handbook 28 - Training and Staff Development

Chapter 11 - The Career Advancement Program (CAP) is a new chapter and has been added to Handbook 28.

Pages TC-3 through TC-5 have been issued to reflect the new chapter addition.

SUPERSEDES:

Pages TC-3 and TC-4 of the Table of Contents (TM 28:48).

FILING INSTRUCTIONS:

1. Remove superseded material as indicated under SUPERSEDES.
2. File the attached in their appropriate places.
3. Initial the Transmittal Memorandum Checksheet (in the back of the Handbook binder) beside TM 28:50.

* * * * *

KEEP THIS TRANSMITTAL MEMORANDUM, which has an up-to-date Checklist for this Handbook on the back. File this TM 28:50 in the front of the handbook binder; discard TM sheet 28:49.

* * * * *

Address questions about this Handbook to PFM/PM/PCF.
For additional copies of this Transmittal contact MS/IRM/PE.

CHECKLIST FOR HANDBOOK 28
TRAINING AND STAFF DEVELOPMENT

AUTHOR OFFICE: PFM/PM/PCF

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PREFACE

Early in 1972 the Agency made the decision to convert the AID manual orders to a series of specialized handbooks. In compliance, SER/PM has developed new personnel handbooks to replace existing personnel manual orders. The objectives have been:

- To condense and simplify directive material.
- To place, to the extent practicable, all information and instructions of general Agency-wide utility on a given subject in one location.
- To highlight principal personnel policies, rules, and regulations.

The personnel handbooks include those rules, regulations, and operating procedures which affect more than one Office, Bureau, or Mission. They also incorporate pertinent Uniform State/AID/USIA Regulations and portions of the Federal Personnel Manual. They do not include detailed background information, functional statements, or internal personnel office procedures, unless this information is essential to users generally.

There are ten volumes:

- Handbook 24, General Personnel Policy
- Handbook 25, Employment and Promotion
- Handbook 26, Position Classification, Pay, and Allowances
- Handbook 27, Attendance and Leave
- Handbook 28, Training and Staff Development
- Handbook 29, Employee Relations and Benefits
- Handbook 30, Separation and Disciplinary Actions
- Handbook 31, Foreign National Personnel
- Handbook 32, Personnel Actions, Records, and Reports
- Handbook 33, Overseas Position Management
(Existing handbook, formerly an attachment to M.C. 435.4, designated as an AID Handbook)

Each handbook is organized into chapters dealing with a topic within the general subject area indicated by the title. A table of contents is included in each handbook. The Transmittal Memorandum for each handbook will indicate which manual orders and manual circulars it supersedes; concurrently, cancellation notices are distributed to all holders of manual orders.

Personnel Handbooks will not all be distributed at once. Accordingly, there will be an interim period where both manual orders and handbooks in the personnel area will be in Agency-wide use. Manual orders and manual circulars will remain in effect until they are specifically superseded by a handbook and canceled by a Manual Transmittal Letter.

Supervisors, employees, and administrative/executive officers should use the handbooks for general guidance in all matters of personnel to which they pertain. For unusual problems or counseling needs, the appropriate office in SER/PM should be contacted.

N O T E

Throughout this Handbook, masculine pronouns are to be interpreted as including both men and women, unless the context specifically excludes this interpretation.

Future revisions will take into account the AID directive (HB 18, Part I, 2E) of 12/30/75 on the avoidance of sex-biased language.

TM 28:4
(1-22-76)

AGENCY FOR INTERNATIONAL DEVELOPMENT

HANDBOOK 28

TRAINING AND STAFF DEVELOPMENT

TM 28:1
January 15, 1975

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CHAPTER 1

GENERAL

1A. Introduction

This Handbook describes AID's training program and policies, sets forth responsibilities for the development and conduct of the several segments of the program, and describes in detail some of its major aspects. AID's training program is in consonance and compliance with Civil Service Commission guidelines as contained in FPM 410 (Chapter 41, Title V, U.S. Code), Foreign Service Act of 1946, and the Foreign Assistance Act of 1961, as amended.

1B. Training Policy

To provide training opportunities to AID employees to develop their growth potential, expand their capabilities, increase their knowledge and skills, make greater assignment flexibilities, and to improve the overall efficiency of the Service both qualitatively and quantitatively.

1. AID provides training for employees without regard to race, color, national origin, sex, age, physical handicap, or other factors unrelated to the need for training. Reinforced by Presidential Memorandum of November 20, 1975, addressed to the heads of all Departments and Agencies, this policy of nondiscrimination must not be affected by exclusionary policies based on a person's race, color, religion, sex, age, or national origin that might have been adopted by some foreign countries. The Presidential Memorandum of November 20th underscored, as this Agency strongly endorses, the applicability of the Equal Employment Opportunity Act of 1972 (P.L. 92-261); Age Discrimination in Employment Act of 1967 (as amended by P.L. 92-269) and their pursuant regulations to all Federal personnel actions.

2. AID's programs provide for training, insofar as practicable in facilities under AID's jurisdiction or control. The Agency may utilize Department of State facilities such as the Foreign Service Institute, participate in interagency training programs, in the Federal sector as well as state and local governments. AID may also utilize non-Government facilities including those of foreign governments or international organizations, academic institutions, business and professional organizations, foundations, and individuals.

1C. Applicability

1. An employee (other than Foreign Service) must be employed with AID for a minimum of 90 days and be security cleared in order to be eligible for Government training unless the Director, Office of Personnel Management, determines in a particular instance that a waiver of this requirement is in the public interest. An exception is language training and orientation for new employees.

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1C

- * 2. AID's training programs are available to eligible AID employees and, in certain cases, members of their families. Contract and PASA employees may attend language training, as required, and may be authorized to attend AID's in-house training courses on a space available basis. For Presidential appointees, only those who are specifically designated by the Office of Personnel Management for training are eligible. *

1D. Responsibilities

The responsibility of PM for the overall planning, development, implementation, monitoring, and evaluation of the Agency's training programs is largely carried out by the *Training and Development Division (PM/TD)*. Others sharing in the training responsibilities include the Executive Manpower Resources Board (see Chapter 6), AID/W Bureau and Office Training Representatives, Mission Training Representatives, supervisors and such special ad hoc committees and task forces as may be designated to assist in the planning, review, and implementation of training programs. Specific responsibilities include:

1. Training and Development Division (PM/TD):

PM/TD is the central source of professional leadership, planning, consultation, guidance, administrative coordination, and evaluation of employee training and career development in AID. PM/TD's responsibilities are to:

- ✓ a. Operate the *Career Development Training Branch* for AID where orientation and a variety of short-term courses are offered.
- b. Assist Missions in program development through direct assistance, detail of training specialists, or by providing appropriate training manuals, program materials, etc.
- c. Review applications for training and in consultation with appropriate AID/W Bureaus and Offices and/or Missions, and make final selections of employees to receive training.
- d. Counsel employees, supervisors, and managers on training programs and opportunities.
- e. Coordinate FSI activities and participate in AID and interagency advisory bodies convened to consider training and development plans, programs, and operations.
- f. Plan and design training and instruction programs to meet the needs of the employee and management.
- g. Develop the training budget.
- h. Provide administrative reports and records of all training activities.

* Revised

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i. Approve training plans before the appointment of Foreign Service employees with initial assignments in Washington. (See Handbook 25 - Employment and Promotion, Chapter 6C.)

2. AID/W Bureau and Office Training Representatives

Each Bureau or Office *has* a Training Representative to:

a. Serve as the principle liaison representative with OPT/PS&CD on matters related to training.

b. Assist OPT/PS&CD in marshalling the unit's resources (i.e., speakers, materials, facilities, etc.) for the effective conduct of training programs.

c. Consult *with employees*, supervisors, and managers regarding training needs, opportunities, and information.

3. Mission Training Representatives

Each Mission has a Training Representative to:

a. Serve as the contact liaison officer between OPT/PS&CD and Mission employees.

b. Conduct or supervise post training programs including orientation, correspondence courses, local employee programs, etc. (Correspondence courses costing \$500 or less should be handled directly between the Mission and the suppliers. Courses costing more than \$500 should be forwarded to OPT/PS&CD for processing.)

* * 4. Supervisors: The supervisor's responsibilities are to:

a. Plan and assess organizational as well as employee training needs.

b. Consult jointly with OPT/PS&CD in the planning and implementation of courses, programs or other action designed to meet organizational training needs.

c. Counsel employees regarding individual/group training needs and nominate employees for training (using OF 170) to OPT/PS&CD.

d. Evaluate effectiveness of individual training (using Section D of OF 170) and forward to OPT/PS&CD. * *

* * New Material

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*1E. Types of Training

1. Short-term attendance at Government or non-Government facilities to improve the conduct, supervision, management, or performance of the employee's official duties. (Official duties means those authorized agency duties which an employee is currently performing or those which he/she could reasonably be expected to perform in the future. This includes potential duties in a different job or occupation at the same or higher level than the one currently held by the employee.) Short-term training is defined as full-time training of one or more hours per day during a consecutive or intermittent period of not more than 120 days.

2. Long-term at Government or non-Government facilities. Long-term training is defined as full-time training usually of 6 to 8 hours per day for more than 120 days, but for not more than 1 year, and while the employee is in full-pay status.

3. Training at Agency expense outside official duty hours, also called "After-Hours" Training, as described in Chapter 7. (Courses may be taken during working hours provided: (a) that the employee voluntarily takes leave, i.e., Annual Leave, Leave Without Pay, Compensatory Time; and (b) a memorandum from the immediate and second-line supervisor stating that such leave will be granted for this purpose accompanies the training application.)

4. On-the-job training assignments at Government or non-Government facilities. These assignments are normally of long-term duration, (e.g., the Work-Study Co-op Program.)

5. Correspondence courses. *

1F. Types of Training Programs

1. Although not necessarily confined to the subject areas listed below, AID provides training opportunities in these general categories:

- a. Orientation, which is mandatory for all new AID appointees.
- b. Foreign language training.
- c. Executive and management development.
- d. Professional and technical development.
- e. Clerical, communications, and other skills training.

* Revised

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- f. Organizational development.
- g. International relations, foreign policy, and area studies.
- h. Project management, design, and evaluation.
- i. Supervisory training.

2. An annual announcement of short-term programs is made at the beginning of the fiscal year and periodic announcements are released throughout the year on ad hoc courses, seminars, conferences, workshops, etc. An annual announcement on long-term training programs is made each autumn.

1G. Application Procedures

1. All categories of training (except language training) sponsored by AID require completion of Optional Form (OF) 170, Request, Authorization, Agreement and Certification of Training. Applicants for language training should use form AID 4-470, Application for Language Training (*attachment to Chapter 4*).

2. All applications for short-term external *training must be* initiated and forwarded through channels so as to reach *OPT/PS&CD* not less than 3 weeks prior to the registration deadline stipulated by the training institutions. (This 3-week deadline does not apply to such *notices* as AID Training News or an AID General Notice which *announce a specific* deadline.) When travel to the training site is required, AID/W employees must attach to OF 170 the Request and Authorization of Official Travel, form AID 5-8, and, if applicable, Advance of Funds Request, form SF 1038. (See Handbook 22, Chapter 7.) *Travel performed by participants in the Development Studies Program is an exception to the above.*

3. The Privacy Act of 1974 (Public Law 93-579) requires that a statement appear on or be provided as a separate attachment to each form which solicits personal information. A Privacy Act Slip Sheet is to be provided *with OF 170* and form AID 4-470 until the required language is incorporated in these forms. *Training applicants must sign* the Slip Sheet in the space provided to indicate that they have read the statement regarding the Privacy Act. Copies of these Slip Sheets are available from the AID Distribution Branch (SER/MO/PAV).

1H. Payment of Training Expenses

1. AID may pay or reimburse:

- a. All or part of the pay (except overtime or night differential pay) of an AID employee approved for the period of training.

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b. All or part of the necessary expenses of training, including among the expenses the necessary costs of:

(1) Travel and per diem instead of subsistence.

(2) Transportation of immediate family, household goods and personal effects, packing, crating, temporary storage, draying, and unpacking, when the estimated costs of transportation and related services are less than the estimated aggregate per diem payments for the training period. An employee reassigned on long-term training within the United States may be eligible for a special high cost of living allowance. Information on and eligibility for this cost of living allowance will be provided to employees before they make their election of transfer or per diem.

(3) Tuition and matriculation fees.

(4) Library and laboratory services.

(5) Purchase or rental of books, materials, and supplies, provided that all nonexpendable items purchased remain the property of the Government.

(6) Other services or facilities directly related to the training of the employee.

c. All or part of the expenses for training conducted outside AID provided that the proposed training is approved by the Office of Personnel and *Training (OPT)* prior to the registration deadline

d. All or part of membership fees provided that such a fee is a necessary cost directly related to the training itself or that payment of the fee is a condition precedent to undergoing the training.

e. All or part of registration fees, excluding meals other than working meals where official business is conducted, and travel expenses for attendance at meetings which are concerned with the functions or activities for which an appropriation is made or which will contribute to improve conduct, supervision, or management of the functions or activities of AID.

2. Contributions and awards incident to training in non-Government facilities, and payment of travel, subsistence, and other expenses incident to attendance at meetings, may be made to and accepted by an employee, if approved by AID and if the contributions, awards, and payments are made by an organization which is exempt from taxation. Such payments are appropriately reduced from payment by the Government to the employee for travel, subsistence, or other expenses incident to training in a non-Government facility or attendance at a meeting. *Note: An employee attending a conference, workshop, meeting, etc., for the purpose of representing the Agency (guest speaker, panel member, or coordinator) is not considered to be in a training status.*

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17. Special Provisions on the Use of Non-Government Facilities

1. Limitations

a. AID may not select or assign an employee for training through a non-Government facility for the purpose of providing an opportunity to an employee to obtain an academic degree in order to qualify for appointment to a particular position for which the academic degree is a basic requirement nor for the sole purpose of providing an opportunity to an employee to obtain one or more academic degrees.

b. Before authorizing training by, in, or through non-Government facilities, AID must determine that the conditions described below have been met:

(1) AID must have determined that adequate training is not reasonably available within the Government to meet the Agency's need; or

(2) New programs cannot be established in time to meet the need effectively; and reasonable inquiry has failed to disclose the availability of suitable and adequate programs elsewhere in Government; or

(3) Use of Government facilities would be more expensive (because of distance, time, or other factors) than would use of non-Government facilities.

c. The following limitations apply to *other than* Foreign Service employees:

(1) *The number of worker-years of training* (computed by totaling training instances exceeding 40 hours each) in a fiscal year may not exceed 1% of the total number of worker-years of civilian employment for AID in the same fiscal year as disclosed by its budget estimates.

(2) An employee must have 1 year of current, continuous civilian service in the Government, be employed with AID for a minimum of 90 days and be security cleared in order to be eligible for training *in non-Government facilities unless the Director, Office of Personnel and Training*, determines that a waiver of any or all of these requirements in a particular instance is in the public interest. Orientation for new employees is exempt in accordance with Chapter 3, Orientation Programs.

(3) The time spent in training may not exceed 1 year in the first 10-year period and in each subsequent 10-year period of an employee's continuous or noncontinuous civilian Government service.

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2. Continuation in Service Agreement

a. Employees approved for training at a non-Government facility must agree in writing prior to the beginning of such training that they will continue in the service of the Government after the end of training for a period at least equal to three times the length of the training unless involuntarily separated, and the employee will pay to the Government the amount of the additional expenses incurred by the Government for training (excluding salary) if they are voluntarily separated before the end of the service agreement.

b. AID may waive repayment in whole or in part if the employee transfers to another Federal agency.

c. If the employee voluntarily separates, AID may waive repayment in whole or in part if it can be shown that recovery would be against equity and good conscience or against the public interest.

1J. How to Complete Optional Form 170

Each course requires a separate application.

Section A - Items 1 - 6 - Self-explanatory

7 - Building & room number, office symbol included (AID/W).

8 & 9 - Self-explanatory

10 - Leave Blank

11 - Specify only the classification title of the position as contained in the position description; e.g., Administrative Officer, and, if applicable, the organizational title of the position, e.g., Director, Executive Management Staff.

12 & 13 - Self-explanatory

14 - Number of years of formal education and highest diploma or degree held. Example: 12 years of education with diploma would = 12 H.S., 12 years of education with 2 years of college, no degree would = 14; 12 years of education with 5 years of college with degree would = 12 M.A.

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1J

Section B - Items 15a,b - Self-explanatory
 16 - Justification of the relationship of the training to the function in item #11 if it is not obvious. Attach separate sheet if additional space is needed.

17 & 18 - Self-explanatory
 19 - Actual classroom hours.
 20a - Purpose - self-explanatory
 b - Type - self-explanatory
 c - Source - self-explanatory
 d - Special Interest - trainees falling under Chapter 6, Handbook 28, use code #1. Training to meet 80 hours requirement for supervisors, use code #2. All other training use code #0.

Section C - Items 21a,
 b,c,d - Self-explanatory
 22a,
 b,c,d - Self-explanatory
 23 - 25 - AID/W leave blank (Mission to complete)

Section D - Items 26a,b - Self-explanatory
 27a,b - Next higher level of supervision below Assistant Administrator.

Items 28a,b - Training Representative in Bureaus/Offices/Missions. In the absence of Training Representatives at the Missions, this block should be signed by Mission Director.

Section E - Item 29a,b - Leave Blank

Section F - Item 30a,b - Leave Blank

Section G - Items 31 - Divide #19 by 8, then multiply by 3 and enter total number of days in block 31.

32 - Signature mandatory for all non-Government training regardless of duration.

- -

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Chapter 2

GRANTS AND REIMBURSEMENT TO FACILITATE ORIENTATION, LANGUAGE, AND FUNCTIONAL TRAINING FOR FAMILY MEMBERS

2A. Purpose

This chapter outlines conditions, criteria, and procedures for providing orientation, language, and functional training for family members who are eligible for such training after the Foreign Service (FS) member has been notified in writing of an overseas assignment or while abroad. Grants for dependent care for eligible family members while they are receiving training are covered in 2F3, Dependent Care Grants.

2B. Scope

The policies and procedures set forth in this chapter are applicable to all U.S. citizen members of the AID Foreign Service.

2C. Authorities

Sections 704(c), 705(a) and (b) of the Foreign Service Act of 1980 (the Act); and 3 FAM 824.6.

1. Section 704(c) of the Act provides that:

"(c) The Secretary may provide to family members of members of the Service or of employees of the Department or other agencies, in anticipation of their assignment abroad or while abroad--

"(1) appropriate orientation and language training; and

"(2) functional training for anticipated prospective employment under section 311."

2. Section 705 of the Act provides that:

"(a) To facilitate training provided to members of families of Government employees under this chapter, the Secretary may make grants (by advance payment or by reimbursement) to family members attending approved programs of study. No such grant may exceed the amount actually expended for necessary costs incurred in conjunction with such attendance.

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"(b) If a member of the Service who is assigned abroad, or a member of his or her family, is unable to participate in language training furnished by the Government through the Institute or otherwise, the Secretary may compensate that individual for all or part of the costs of language training, related to the assignment abroad, which is undertaken at a public or private institution."

2D. Definitions

1. "Dependent," under these regulations, means children under the age of fifteen or disabled dependents normally residing in the home of the member of the service.
2. "Family member" means a family member, as defined in 6 FAM 117 (k), who is eighteen years of age or older, and who is expected to accompany the FS employee during the major portion of that employee's overseas assignment.
3. "Government-sponsored language training" means language training at the Foreign Service Institute's (FSI) Washington facilities or its overseas field schools or at a commercial language training facility that has a contract to provide language training for the Government.
4. "Public or private institution" means a public or private school, college, institute, or language training institution. Instruction by individuals not under the auspices of such institutions is excluded.

2E. Administration of Grants and Reimbursements

Grants and reimbursements to family members receiving training in the U.S. shall be administered by the Chief of Training and Development Division (M/PM/TD), or designee, and for family members receiving training overseas by the Executive Officer.

2F. Types of Grants

1. Training Provided for Family Members

Grants may be made to family members under section 2C2(a) to facilitate attendance in the following programs:

- a. Area study courses, full- or part-time;
- b. Programs of the Workshop for Foreign Service Families, and the Overseas Briefing Center;

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c. Regular, full-time, early morning, part-time, familiarization and short term (FAST), and specially arranged language training, including the area study portions of such courses; or

d. Such other course offerings as the Chief of M/PM/TD, or designee, or the Executive Officer at the overseas post, shall determine are appropriate for the orientation, language training, and functional training necessary for anticipated prospective employment under sections 311 and 704(c) of the Act.

2. Language Training Provided at Other Institutions

a. The specifications of language training under section 2C2(b) must include:

(1) Training in a primary or primary alternate language of the post to which the Foreign Service employee is assigned;

(2) Training of at least ten but not more than thirty class hours per week, exclusive of language laboratory or other self-study hours.

b. A family member is eligible for language training overseas under section 2C2(b) only if the member of service is being assigned from one overseas post to another (with a different primary or primary-alternate language) without opportunity for training in Washington. The Application for Dependent Care/Training Grant (form AID 460-16, 4/83) will be submitted to the new post. The new post will approve the language training subject to the availability of funds as the receiving post must assume the costs of the language training and any related dependent care costs.

c. A family member who is not living in the Washington, D.C., area or is unable to attend a Government-sponsored language program because of family duties and responsibilities, illness, disability, employment, or a program of formal study is eligible for programs authorized under section 2C2(b) when the Chief of Overseas Division (M/PM/OS), or designee, approves the onward assignment. After the Application for Dependent Care/Training Grant (form AID 460-16, 4-83) is signed by the Chief of M/PM/OS, or designee, copies of the signed form are sent to the FS employee as notification of M/PM/OS's approval of the application and to M/PM/TD for approval of the grant.

d. The following limitations are placed on eligibility for grants or other compensation under this section:

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(1) Refusal of the family member for reasons of personal convenience to attend Government sponsored training does not constitute inability of the family member to attend. The Government is not required to schedule classes at FSI or elsewhere solely for the personal convenience of the family member so long as language training can be provided in a timely manner before the family member must leave for the overseas assignment.

(2) If appropriate Government-sponsored language training is available and the individual, although able to do so, chooses not to participate, the individual is not eligible for training elsewhere at Government expense.

(3) Reimbursements for language training provided at a public or private institution will not be for more than 720 hours of instruction in preparation for any one overseas assignment.

(4) Payment for training grant may be made only to the FS employee.

(5) Training grant or other compensation will include the necessary costs incurred in conjunction with such training, but will not cover the costs of expendable supplies.

3. Dependent Care Grants

a. Dependent care grants under section 2C2(a) are made only to permit family members normally responsible for the care of dependent(s) of the FS employee to attend authorized training.

b. For dependent care grants under section 2C2(a), a family member as defined in section 2D is eligible for programs authorized under section 2C1 when the Chief of M/PM/OS, or designee, approves the onward assignment. After the Application for Dependent Care/Training Grant (form AID 460-16, 4-83) is signed by the Chief, M/PM/OS, or designee (the employee's Personnel Officer), copies of the signed form are sent to the FS employee as notification of M/PM/OS's approval of the application and to M/PM/TD for approval of the grant. In case of assignment from one overseas post to another, M/PM/OS notifies by cable the FS employee and the Executive Officers at the gaining and losing posts.

c. The following limitations apply to dependent care grants:

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(1) Payment cannot be made for any days in which the family member is not in attendance for the scheduled training.

(2) Grants are limited to dependent care during scheduled training hours and for a reasonable time before and after hours to provide for travel time to and from the training facility, for children under the age of fifteen or disabled dependents normally residing in the home of the FS employee.

(3) Payment for dependent care will not be made for a child during the hours the child normally would be expected to attend school on a full-time basis

(4) Payments for dependent care may be made only to the FS employee.

(5) The actual cost of transporting dependent(s) to and from the location of daily care or of transporting the person(s) providing the care to and from the home may be included.

(6) Dependent care compensation will include the necessary costs required for attendance at a day care center or preschool facility, but will not cover the costs of expendable supplies.

d. It is the policy of AID to provide reimbursement for dependent care for eligible family members while they are receiving training under section 2C1 at a public or private institution on the same basis as if they were in training provided by the Government at FSI or otherwise.

2G. Application and Payment Process Procedures for Training in U.S.

1. Training Grants for Family Members and Dependent Care

a. Grants for training of family members and/or dependent care costs incurred while attending Government-approved courses, are made either in advance or by reimbursement. After the Chief of M/PM/OS, or designee, approves the onward assignment, the employee must submit Application for Dependent Care/Training Grant (form AID 460-16, 4-83) to M/PM/TD completed except for the grant number, accounting data, and signature of the Training Division Chief. Copies of form AID 460-16, signed by the Chief of M/PM/OS, or designee (the employee's Personnel Officer), are sent to the FS employee as notification of M/PM/OS's approval of the application and to M/PM/TD for approval of the grant. The Chief of M/PM/TD, or designee, will approve the grant subject to the availability of funds (including the assignment of a grant number). The grant number used will be the obligation number. If an advance is

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desired to meet the anticipated cost of dependent care or training course, the form must be received by M/PM/TD at least three weeks before the start of the course. The applicant may request an advance payment against the grant. The amount advanced will be for the length of the training period or ninety days whichever is shorter. If the training period is beyond ninety days, the applicant will be required to apply for a second advance payment not to exceed a second ninety day period, until the total amount of the grant has been advanced. The certification form (AID 460-17, 4-83) must be filed on a monthly basis so that the advance may be liquidated.

b. The Certification for Dependent Care/Training Grant (form AID 460-17) and valid receipts (or a copy of cancelled checks) for actual expenditures must be submitted to M/PM/TD on a monthly basis. PSI or other training-institution's representative, as appropriate, should certify on form AID 460-17 that the family member was a student in good standing during the period for which the payment is claimed. Good standing includes regular attendance (eighty percent or more of the scheduled class hours), full participation, and satisfactory performance in the course. M/PM/TD will then complete Part IV of the form, as appropriate, and submit it to M/FM/SSD for payment or as a voucher against the advance received.

2. Reimbursement for Tuition Costs of a Language Program at a Public or Private Institution

Reimbursement for tuition will be based on the amounts quoted by commercial suppliers of language training services to private, business, and Government customers. The Chief of M/PM/TD, or designee, determines at the time the application form is submitted for approval whether the training cost quoted by the prospective supplier is reasonable. Applications may be rejected if the costs appear excessive. In addition to the application form, a family member wishing compensation for training should provide (by means of an attachment) an explanation of inability to attend Government-sponsored training. The application must be received at least three weeks before the scheduled start of the training and must be approved by the Chief of M/PM/TD before training starts. Upon completion of training by the family member, the employee submits to M/PM/TD the form AID 460-17 with parts I, II, and III completed, as appropriate, and receipts for actual expenditures or a copy of cancelled checks. M/PM/TD retains a copy and forwards the original to M/FM/SSD approved for payment. M/FM/SSD will issue a check payable to the employee, if appropriate.

3. Forms

a. Application for Dependent Care/Training Grant (Form 460-16, 4/83)

The Application for Dependent Care/Training Grant is a five-part form. The applicant must complete all applicable sections of the form with the exception of the grant number and Part III. The employee must send the form to the appropriate Personnel Officer who signs for M/PM/OS and forwards the form to M/PM/TD for approval. M/PM/TD reviews and approves the form, if appropriate, and fills in the accounting data. M/PM/TD distributes the form as follows:

White (orig.)	M/PM/TD
Yellow Copy	M/PM/OS
Blue Copy	M/FM/SSD
Pink Copy	M/FM/SSD
Green Copy	Employee

The Personnel Officer retain the M/PM/OS copy in the employee's personnel file. M/FM/SSD will process the advance if one has been requested and send a check to the employee at the mailing address indicated in Part I of the application form.

b. Certification for Dependent Care/Training Grant (form AID 460-17, 4-83)

The Certification for Dependent Care/Training Grant is a three-part form. The applicant must complete the form through Part III and obtain all necessary signatures as appropriate. The form is then forwarded to M/PM/TD where it is reviewed and approved if reasonable. M/PM/TD distributes the form as follows:

White (orig.)	M/FM/SSD
Yellow Copy	M/PM/TD
Green Copy	M/FM/SSD (Employee Copy)

M/FM/SSD uses the certification form as a voucher against any advance issued or for the issuance of a check to the employee if a reimbursement has been requested on the form. The certification form and valid receipts (or a copy of cancelled checks) must be submitted on a monthly basis. Any advance received by the FS employee which is not liquidated by the certification form(s) must be repaid to AID by the employee in accordance with the procedures outlined in AID Handbook 19, Chapter 7. The green copy is forwarded to the employee by M/FM/SSD.

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2H. Application and Payment Process for Training Overseas

1. Training Grants for Family Members and Dependent Care

a. Grants for training of family members and/or dependent care costs incurred while attending Government approved courses overseas are made either in advance or by reimbursement. After approval by cable from the Chief of M/PM/OS, or designee, of the assignment of the FS employee from one overseas post to another, the employee must submit the Application for Dependent Care/Training Grant to the Executive Officer at the new post. The applicant must complete all applicable sections of the form with the exception of the grant number and Part III. After approval by the Executive Officer, the form is submitted to the post Controller, or designee, who certifies the availability of funds by signing in Part III for Training Division Chief. The certified form is returned to the Executive Officer by the Controller, or designee, after which the Executive Officer distributes the forms.

b. The Certification for Dependent Care/Training Grant and valid receipts (or a copy of cancelled checks) for actual expenditures must be submitted to the Executive Officer at the new post on a monthly basis. The applicant must complete the form through Part III and obtain all necessary signatures. The FSI overseas field school or other training institution's representative, as appropriate, should certify satisfactory participation on the Certification for Dependent Care/Training Grant, as outlined in 2G1b above. The Executive Officer will then complete Part IV of the form, as appropriate, and submit it to the post Controller, or designee, for payment or as a voucher against the advance received.

2. Reimbursement for Tuition Costs of a Language Program at a Public or Private Institution Overseas

Reimbursement for tuition will be based on the amounts quoted by commercial suppliers of language training services to private, business, and local Government customers. The Executive Officer at the new post, or designee, determines at the time the application form is submitted for approval whether the training cost quoted by the prospective supplier is reasonable. Applications may be rejected if the costs appear excessive. In addition to the application form, a family member wishing compensation for training should provide an explanation (by means of an attachment) of inability to attend Government-sponsored training. The application must be received at the new post and be approved by the Executive Officer at least three weeks before the scheduled start of training. Upon completion of training by the family members, the employee submits the certification form to the Executive Officer with Parts I, II and III completed, as appropriate, with

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receipts for actual expenditures or copies of cancelled checks. After signing in Part IV, the Executive Officer retains the yellow copy and forwards the original and green copy to the post Controller, or designee, who forwards a check, if appropriate, and the green copy to the employee.

3. Forms

a. Application for Dependent Care/Training Grant (form AID 460-16, 4/83)

Distribution of copies:

White and Yellow - Retained by Executive Officer at gaining post
 Blue and Green - Post Controller at gaining post
 Pink - Executive Officer at losing post

The Controller will forward a check if an advance has been requested, and the green copy to the employee.

b. Certification for Dependent Care/Training Grant (form AID 460-17, 4-83)

Distribution of copies:

White and Green - Post Controller at gaining post
 Yellow - Retained by Executive Officer at gaining post

The Controller uses the certification form as a voucher against any advance issued or as justification for the issuance of a check to the employee if reimbursement has been requested. The check (if appropriate) and the green copy will be forwarded to the employee by the Controller.

2I. Taxability of Grant Payments

Individuals receiving grants for dependent care or reimbursement for tuition costs of non-Government-sponsored language training are advised that Federal, State, and other U.S. jurisdictions may consider such payments as taxable income. Because the taxability of these grants may vary from case to case, individuals receiving grants and/or reimbursements under this section are personally responsible for verifying such Federal, State and local taxability.

Attachment 2A, Application for Dependent Care/Training Grant (form AID 460-16, 4-83)

Attachment 2B, Certification for Dependent Care/Training Grant (form AID 460-17, 4-83)

AGENCY FOR INTERNATIONAL DEVELOPMENT

APPLICATION FOR DEPENDENT CARE/TRAINING GRANT

(See reverse of green copy (Employee's Copy) for Privacy Act Statement)

Employee's Name	Social Security Number	Date
Grant Number	Country of Assignment	Amount to be Advanced \$

 Request for Dependent Care and/or Request for Training Grant

PART I - TO BE COMPLETED BY APPLICANT FOR GRANT

Applicant's Name	Social Security Number	Home Telephone Number (include area code)	Business Telephone Number (include area code)
Mailing Address (street, city, state, zip code)			

PART II - COMPLETE SECTION A FOR DEPENDENT CARE AND/OR SECTION B FOR TRAINING GRANT

A. Dependent Care Grant

Period of Day Care Service	Hours Per Day of Care			
From	To	From	To	
*Estimated Costs	Per Day	Per Week	Per Month	Total
Day Care Services	\$	\$	\$	\$
Day Care Transportation	\$	\$	\$	\$
Name(s) of Dependent(s) to Receive Care	Age	Date of Birth	Relationship to Employee	

I certify that the name(s) listed is/are legally my dependent(s) according to the Internal Revenue Service definition for income tax purposes (use back of form to list additional dependents).

Signature of Person Claiming Dependent(s)

B. Training Grant for Training Provided at Private or Public Institution

Title of Training Course	Estimated Proficiency (for language training only)	
	Speaking	Reading
Name of Training Institution	Telephone Number (include area code)	
Mailing Address (street, city, state, zip code)		

Enrollment Dates	Hours Per Day of Training			
From	To	From	To	
*Tuition Costs	Per Day	Per Week	Per Month	Total
\$	\$	\$	\$	\$

*If anticipated costs varies considerably during training, prepare a schedule on back of this form.

Person Requesting Grant's Signature

Date

PART III - APPROVAL

Typed Name of Personnel Officer	Signature	Telephone Number (include area code)	Date	
Typed Name of Training Division Chief or Designee	Signature		Date	
FUNDS AVAILABLE	Appropriation	Allotment - Budget Planning Code	Obligating Document Number	Amount \$

PRIVACY ACT STATEMENT

Authority: Public Law 96-465, Section 705

Principal Purpose: To obtain information necessary for the Agency to provide grants or reimbursements to facilitate orientation, functional, and language training and to provide dependent care for family members of Foreign Service employees.

Routine Uses: The personal information is used by the Agency to determine eligibility in the program, process applications, approve grants or reimbursements, maintain records, and perform all other administrative functions inherent in the program.

Disclosure: Mandatory for personal information and SSN. Failure to provide mandatory information will result in the denial of the application for the grant or reimbursement.

AGENCY FOR INTERNATIONAL DEVELOPMENT

CERTIFICATION FOR DEPENDENT CARE/TRAINING GRANT

Employee's Name

Grant Number

PART I - CERTIFICATION OF ATTENDANCE AND SATISFACTORY PARTICIPATION

This is to certify that

A. Participated fully in the _____ training course
during the month of _____, 19 _____.

B. Attended at least 80% of scheduled sessions

C. Days absent

D. Training Representative's Signatures

FSI Representative's Signature

Date

Name of Training Institution (other than FSI)

Training Institution Representative's Signature (other than FSI)

Date

Claimant's Signature

Date

PART II - CERTIFICATION OF DAY CARE SERVICES PROVIDED

This is to certify that I, _____, have received \$ _____
from _____ for the month of _____, 19 _____.

Provider of Child Care's Signature

Date

Address

PART III - REQUEST FOR REIMBURSEMENT

 Dependent Care and/or Training GrantRequest for reimbursement is hereby made in the amount of \$ _____ for dependent care and/or \$ _____
for training grant for the total amount of \$ _____ during the month of _____, 19 _____.
I certify that I have not previously been paid for this amount.

Claimant's Signature

Date

PART IV - APPROVAL

This monthly accounting for the month of _____, 19 _____ meets the requirements of 3 FAMC 824.6 and
is approved for payment against Grant Number _____.

Division Chief, M/PM/AD/TD Signature

Date

CHAPTER 3
ORIENTATION PROGRAMS

3A. General

1. Orientation Programs are designed to give employees an introductory understanding of:

- a. The purposes and objectives of the U.S. foreign assistance program.
- b. Procedures and means by which foreign assistance programs are formulated and carried out.
- c. Cultural factors involved in introducing these programs into an alien environment.
- d. Important factors related to living abroad as representatives of the United States.
- e. Employee conditions and benefits.

2. Orientation is conducted both in Washington and at the Mission. It includes structured classroom presentations, discussions, and consultation with AID/W Office, Bureau, and Mission representatives.

3B. Applicability

Orientation programs apply to these categories:

1. New employees, PASA, and contract employees of the Agency and their adult dependents.
2. Employees who convert to the Foreign Service.
3. Foreign Service employees transferring from one region to another.
4. Experts and consultants.

3C. Responsibilities

1. SER/PM

The Director, SER/PM, or his designee; i.e., Chief, SER/PM/PS&CD, has authority and responsibility for:

- a. Authorizing absence from an orientation class.

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3C1

b. Approving requests for abbreviated selected orientation.

2. SER/PM/PS&CD

✓ SER/PM/PS&CD is responsible for designing, developing, scheduling, and evaluating AID/W orientation programs and assisting Missions in the conduct of their programs. SER/PM/PS&CD maintains appropriate files and records on Orientation Programs.

3. Placement Officers, SER/PM

Placement officers schedule employees for orientation using form AID 4-401, Enrollment in AID Orientation Program (Attachment 3A), and maintain liaison with SER/PM/PS&CD and the employee.

4. Bureaus and Offices

AID officials and employees have the responsibility to participate in orientation programs as speakers or discussion leaders or in the performance of other services as requested by SER/PM/PS&CD. This participation is a functional responsibility of all officials and employees of AID.

5. Contracting Officer

In consultation with contractor and Bureau technical officers, the contracting officer schedules contract employee orientation.

3D. Washington Orientation Programs

1. All newly appointed AID employees are expected to attend the first appropriately scheduled orientation after taking the Oath of Office.

2. Regular as well as specially tailored orientation programs are provided to meet the following needs:

a. All new technical and professional employees, are given a regular 2-week orientation program covering foreign policy and its operations, international assistance programs, communications principles, AID documentation and funding, and analysis of the AID overseas environment.

b. New employees assigned to Washington who will serve as clerks, clerk-typists, clerk-stenographers, secretaries, and administrative assistants, are given a 1-week compulsory orientation program including correspondence procedures; AID filing system; processing telegrams and government forms; secretarial practices and procedures; AID's merit promotion programs, training programs, employee relations and responsibilities; and a general working knowledge of AID programs.

3d2

c. Newly appointed Foreign Service employees take the regular orientation program in addition to some on-the-job orientation, lasting up to 4 weeks. Select, special, or reduced orientation will be given as required on an individual case basis.

d. Previous employees of AID with a break in service of up to 1 year are given special abbreviated orientation to update the employee's knowledge of recent changes.

e. Foreign Service employees on rotation to another overseas country or region including assignments to AID/W may require only a few days consultation and orientation with Bureau, Office, or PM/PS&CD staff.

f. GS to FS conversion employees attend a 1 to 4 week orientation.

g. Adult dependents accompanying employees going overseas are given a separate 1-week orientation program. This monthly program is conducted concurrently with the overseas employee orientation program.

h. Contract employees being assigned overseas for 1 year or more in AID programs receive 2 weeks orientation prior to departure, unless a modified orientation program is authorized. To schedule the regular contract orientation, the contractor and the contracting officer agree on a scheduled input date for the 2-week orientation by AID. The contracting officer advises SER/PM/PS&CD in writing of the selected starting date, the employee's name, job title, country of assignment, U.S.A. address for advance mailing of orientation materials, and other relevant data using the memorandum form AID 4-401, available from SER/PM/PS&CD. Contract employee orientation may be modified or omitted based on prior experience, the new job requirements, foreign language experience, or unusual circumstances surrounding the project.

3. Seminar on Terrorism - Due to the current terrorist problems, all FS employees are required to attend a one day seminar on terrorism sponsored by the Foreign Service Institute. In addition, GS employees going overseas on TDY and dependents accompanying FS employees overseas are encouraged to take advantage of the opportunity to familiarize themselves with the nature of the threat, with U.S. Government policy, and with practical measures to decrease personal risk. This seminar will include such subjects as travel precautions, residential security, hostage survival, bomb threats, dependent awareness and attacks on foreign service posts.

TDY to AID/W for the sole purpose of attending this one day seminar is not authorized. Personnel in AID/W requesting this training should submit Optional Form 170 (10 parts) through their supervisor and Bureau/Office training adviser to PM/PS&CD, Room 425 Pomponio Plaza (SA-14), telephone 235-9070. Mission employees should send their applications to FSP (appropriate backstop officer) who in turn will forward the application to PM/PS&CD.

The dates of the seminar are published periodically in AID General Notices.

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3E. Mission Orientation Programs

1. Newly assigned U.S.-citizen Government employees, PASA, and contract employees as specified in their contracts, together with the adult dependent members of their families, receive Mission orientation. Its purpose is to facilitate their prompt and effective adaptation to Mission living conditions. These employees and their families receive information on the following:

- a. Housing, schools, domestic help, medical facilities, health precautions, local currency, shopping, and transportation.
- b. The host-country history, geography, climate, culture, economy, politics, and governmental organization.
- c. The purposes, organization, and scope of the Mission program with particular reference to the functional division with which the employee will be associated.
- d. The program activities of other United States agencies, private groups, multilateral groups, and other third-country groups and agencies.
- e. Criteria and guidance for developing good relations and effective communications between the American community and the people of the host country.

2. The Mission Training Representative or Staff Training Coordinator insures that an adequate and comprehensive orientation program is provided to meet the employees' needs.

3. Each Mission sends, in triplicate, an annual report of orientation activities to the Geographic Bureau Training Representative, who sends two copies to SER/PM/PS&CD. The report is to include:

- a. Syllabus or course content.
- b. Nature and duration of orientation activities.
- c. Numbers of employees served by functions.
- d. Samples of instructional materials used.
- e. Number and sources of instructors used.
- f. Evaluation of program effectiveness.

4. SER/PM/PS&CD sends to the Missions "Guidelines for Orientation" for use by the Staff Training Coordinator, PASA Chiefs of Party, and contractors. When feasible, SER/PM/PS&CD on request details an orientation specialist from its staff to advise on program development and management.

TO	SER/PM/OTB, Chief, Operations Training Branch
SUBJECT	ENROLLMENT IN AID ORIENTATION PROGRAM Room 405, Pomponio Plaza Building, Telephone 235-9101 1735 N. Lynn St., Arlington, Virginia

Please schedule the following employee for Orientation at the address shown above. This address IS NOT to be used as a MAILING address.

START DATE (Monday)

NAME (Last, First, Middle Initial) Mr. Ms. Miss Mrs.

E.O.D. DATE

POSITION TITLE

GRADE (GS, FS, FC)

ASSIGNMENT LOCATION

TYPE OF ASSIGNMENT ("X" appropriate boxes)

OVERSEAS (Report for registration between 9:00 a.m. and 10:00 a.m.)

AID Direct Hire

Contractor

Name of Contractor _____

Contract Number _____

PASA

Name of Participating Agency _____

Agreement Number _____

AID/Washington

Professional (Report for registration at 9:00 a.m.)

Administrative/Clerical (Report for registration at 1:00 p.m.)

Other (Specify) _____

EMPLOYEE IDENTIFICATION

FROM	NAME	OFFICE	TELEPHONE NO.	DATE
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DISTRIBUTION	OVERSEAS	AID/W
	<input type="checkbox"/> Employee	<input type="checkbox"/> Employee
	<input type="checkbox"/> AID/W Tech. Backstop Officer	<input type="checkbox"/> AID/W Supervisor
	<input type="checkbox"/> Contracting Institution	
	<input type="checkbox"/> PASA Agency	

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CHAPTER 4

FOREIGN LANGUAGE PROGRAM

4A. Purpose

This chapter establishes the policies, regulations and procedures for A.I.D.'s foreign language program and supersedes 3 FAM 870.

4B. Applicability

This chapter applies to A.I.D. U. S. citizen Foreign Service (FS); Senior Foreign Service (SFS); General Schedule (GS); Participating Agency Service Agreement (PASA), and contract employees, and spouses and dependents.

4C. Authorities and References

- o Foreign Service Act of 1980, as amended, Sect. 101, 701, 702, 704, 705
- o 5 USC 4101-4118

4D. Definitions

1. Adult Family Members. Family members, 18 years or older, expected to accompany the employee to post.
2. A.I.D. Incentive Languages (Att. 4A). A.I.D.-useful primary and primary-alternate languages except for Italian and Category A languages.
3. Category A Language (Att. 4B). French, Spanish and Portuguese.
4. Language Designated Position (LDP). A position officially designated by the Agency as requiring a specific level of language competence essential for the successful performance by the incumbent.
5. Incentive Language Payment. A monetary payment to an employee who achieves specific FSI-tested proficiency in an A.I.D. incentive language and is assigned to an incentive language post.
6. Modern Language Aptitude Test (MLAT). A test designed to indicate an individual's probable degree of success in learning a foreign language.

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7. Primary-Alternate Language. A nonindigenous language officially or widely used by a government to conduct internal and foreign affairs and by educated circles whether or not an indigenous language also is used officially or generally by the people. Examples: French in Tunis, English in New Delhi.

8. Primary A Language. An indigenous language that is the sole and official national language of the area, or an indigenous language used officially on a coequal basis, nationally or regionally, with a primary-alternate language. Examples: French in Paris, Urdu in Karachi, Tamil in Madras.

9. Primary B Language. An indigenous language used by a significant segment of the population but not used officially by the government. Examples: Lingala in Kinshasa, Pashto in Kabul, Visayan in Cebu.

10. Proficiency Test. A structured interview examination administered by a certified Foreign Service Institute Language Examiner. The grades are stated in Speaking/Reading (S/R) terms and are officially recorded.

11. Secondary Language. Any language other than a primary or primary-alternate language used to communicate with a substantial segment of the population or with a politically, economically or culturally significant minority group. Examples: Chinese in Bangkok, Quechua in La Paz, French in Ankara.

4E. Policies

1. FS employees will be provided language training as required and will be eligible for language incentive pay without regard to political affiliation, race, color, religion, national origin, sex, marital status, age or handicapping condition.

2. FS employees must meet the language requirement of their assignments. To be tenured, FS employees must reach a minimum Foreign Service Institute-tested language proficiency level of S-2/R-2 (R-0) in an A.I.D. tenuring language.

3. FS employees are expected to acquire a courtesy level knowledge of the host country language even if their particular assignments do not require a job-related language proficiency.

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4. Language incentive payments will be paid to a qualifying employee only for the time the employee is in the country in which the language is an A.I.D. incentive language. Statutory and Chief of Mission pay caps do not affect the language incentive payment.

4F. Responsibilities

1. Director, Office of Personnel Management (M/PM/OD)

- a. Administers and evaluates A.I.D.'s Foreign Language Program.
- b. Approves curtailment, termination or postponement of language training.
- c. Approves waivers of language training in the United States.
- d. Makes final decision on disputes concerning applicability of incentive language payments.

2. Training Division (M/PM/TD)

- a. Oversees training aspects of A.I.D.'s Foreign Language Program and coordinates language program activities.
- b. Plans, develops and reviews budgets for A.I.D. language training activities.
- c. Approves, in consultation with appropriate offices/bureaus, changes in language designated positions as recommended by Mission Directors, Principal A.I.D. officers and Regional Inspectors General.
- d. Reviews and evaluates language training programs. Assembles data and prepares periodic reports on A.I.D.'s compliance with policies, language proficiency requirements and issuance of waivers of language training in the United States.
- e. Approves and arranges A.I.D. employee enrollment in the Foreign Service Institute (FSI) and other language training facilities.
- f. Makes arrangements for the Modern Language Aptitude Test and proficiency tests.

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g. Provides relevant information and makes recommendations concerning requests for termination, curtailment or postponement of language training for career candidates and waivers of language training in the United States.

h. Provides technical advice and handles inquiries and correspondence related to the operational aspects of language training.

i. Forwards FSI performance reports and other pertinent information for employees enrolled in fulltime language training to the appropriate office (M/PM/EPM, M/PM/FSP or IG/ADM).

j. Codes employees' language aptitude and proficiency test scores and completion of language training courses for inclusion in RAMPS and makes certain that records are current and complete.

k. Provides advance notice of scheduled visits by FSI Language Examiners to posts.

l. Coordinates with M/PM/PP to add or delete languages from A.I.D.'s tenuring and/or incentive language list and notifies bureaus/offices and overseas posts of changes.

3. Executive Personnel Management Staff (M/PM/EPM), Foreign Service Personnel Division (M/PM/FSP), Inspector General (IG/ADM), as appropriate

a. Provides potential appointees written information regarding the Agency's language program, language proficiency requirements for tenuring, and language training performance standards and retention/termination criteria. Sends a copy of the Memorandum for Language Training Performance Standards and Reporting Procedures (Att. 4D) to M/PM/TD, the administrative file of the employee's Official Performance File (OPF) and the employee.

b. Determines needs and requests M/PM/TD to schedule applicants or new hires for MLAT or language proficiency tests before appointment or no later than 30 days after appointment. Informs applicants and employees of test results.

c. Coordinates with overseas posts and M/PM/TD to arrange training for career candidates who do not meet language requirements.

d. Forwards employees' and dependents' training application to M/PM/TD at least three weeks in advance of desired training.

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e. Reviews language performance reports on A.I.D. employees enrolled in full-time language training, counsels employees who have not met the performance standards, and prepares appropriate documentation. Informs A.I.D./W bureaus/offices and overseas posts of employees' progress; makes certain that copies of all performance reports are placed in the evaluation file of the employee's OPF.

f. Notifies overseas posts of employees' FSI-tested language proficiency, eligibility for incentive pay and percentage of base salary for which they qualify. Makes certain that copies of test results are placed in the evaluation file of the employee's OPF.

g. Provides backstopping/administrative support in language training when the training relates to an assignment action.

4. Mission Directors, Principal A.I.D. Officers and RIGs

a. Annually review language proficiency requirements for existing and proposed language-designated positions and certify that positions conform to established criteria or recommend changes.

b. Make certain that employees' language testing/training needs are stated in communications (including departure notices) regarding consultation, R&R and/or home leave in the United States.

c. Make certain that employees who do not meet required proficiency levels for tenuring or of their positions are provided training opportunities.

d. Monitor post language training for employees and advise M/PM/EPM, M/PM/FSP or IG/ADM (with a copy to M/PM/TD and the employee) when the post language officer determines that further training will not result in achieving the required level of proficiency and that post language training is being terminated. Include in the advisory statement the employee's achieved proficiency level and the expected communications effectiveness.

e. Make certain that employees who are not in compliance or who may qualify for language incentive pay or for a higher percentage of language incentive pay are tested when FSI Language Examiners visit the post.

f. Make certain that timekeepers record required information to start and terminate language incentive payments on Time and Attendance Reports.

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g. Recommend waiver of language training scheduled in the United States.

5. Executive Management Staff (EMS), Regional Bureaus and IG

a. Review language requirements report recommended by overseas posts or Regional Inspectors General. Send reports, through M/PM/TD, to the Director, M/PM.

b. Review and approve/disapprove applications for language training.

c. Initiate or complete overseas post requests for waivers of language training in the United States. Send requests to M/PM/EPM or M/PM/FSP for decision by the Director, M/PM, or IG/ADM for decision by the IG, as appropriate.

6. Office of Procurement (M/SER/OP)

a. Contacts M/PM/TD to schedule MLAT and/or proficiency tests to determine compliance with language requirements specified in PASA agreements or contracts, need for language training, and/or eligibility of PASA employees for language incentive payments.

b. Coordinates with bureau project managers to make certain PASA and contract employees have the required language competence specified in underlying agreements and contracts before departure for post.

7. Supervisors

a. Support employees' efforts to meet basic language requirements of their positions and to improve language proficiency.

b. Make certain employees' interests and efforts in job-related language learning and usage are reflected in performance evaluations. When an employee does not have the required language proficiency, discuss how to overcome the deficiency and note progress in the employee's performance evaluation.

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8. Employees

a. Acquire and maintain required levels of language proficiency in an A.I.D. Category A or incentive language.

b. FS employees assigned overseas and coming into or reassigned to A.I.D./W should contact M/PM/EPM, M/PM/FSP IG/ADM to discuss language-related issues, such as the need for MLAT and/or proficiency testing, the need for language training or eligibility for language incentive pay at a new post.

4G. Procedures to Establish Language Designated Positions

A.I.D. designates for all overseas FS positions the foreign language proficiency required for the adequate accomplishment of the duties of the position. Only those positions for which language proficiency is essential will be designated.

1. New Positions

Language designations for new overseas positions are set by the Mission Director or IG, as appropriate.

2. Annual Review

a. Mission Directors, Principal A.I.D. Officers and Regional Inspectors General (RIGs) annually review language designations. They must certify (no later than March 31) to the Director, M/PM or to the Inspector General, through M/PM/TD, that established requirements are adequate or, if duties and responsibilities have changed significantly, recommend modification (see Att. 4F). Recommended modifications must be fully justified. A copy of the certification or recommended changes must be sent to the appropriate EMS.

b. Changes in position language requirements will be made only at the time of the annual review. Language requirements will not be changed to avoid delays in recruitment or assignment.

4H. Language Proficiency Requirements

1. Tenuring

FS career candidates (except for backstops 05 and 07) appointed on or after February 15, 1981, must have an FSI-tested proficiency of at least an S-2/R-2(R-0) in an A.I.D. tenuring language to be tenured.

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2. Promotions

There are no specific language proficiency requirements for promotion in the FS or for entry into the SFS. However, proficiency in a foreign language, especially one related to an FS employee's assignment, will be an important factor in evaluating career members for promotion, particularly at the Senior Threshold level.

3. Language Designated Positions

LDPs should not be designated above the S-3/R-3 or below the S-2/R-2 level. Most LDPs in French, Spanish, Portuguese and Italian would be designated at the S-3/R-3 level.

4I. Language Testing

1. M/PM/FSP, M/PM/EPM or IG/ADM will contact M/PM/TD at least two weeks before the desired test date to schedule a test at the Foreign Service Institute (FSI) for an employee going to post. The post executive officer will make arrangements for testing at post through M/PM/TD. Retesting may only be requested six months after a previous test, or after 100 hours of formal language training.

2. The Modern Language Aptitude Test (MLAT) is required for all FS employees and for all other persons scheduled for language training. The MLAT is taken during the oral interview phase of hiring or not later than 30 days after appointment.

3. FSI testing of foreign language proficiency is required to determine eligibility for tenuring review, compliance with position requirements, training needs and eligibility for incentive pay. Testing also may be required for PASA and contract employees to determine compliance with language requirements of the basic underlying agreement or contract.

4. FS applicants who indicate a proficiency in French or Spanish will be tested prior to entrance on duty. Successful applicants who do not have an FSI-tested S-2/R-2(0) or above in an A.I.D.-useful language will be assigned to language training.

5. FSI test scores are used to make assignments. Except for incentive payment purposes (see 403. Payment Levels), an FSI-tested proficiency level of S-4/R-4 or above is valid indefinitely; a proficiency level of S-3/R-3 or below is valid for five years. An employee who previously scored at the proficiency level required by the prospective position but whose test date does not meet the aforementioned validity dates shall be retested.

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6. Language proficiency tests will not be scheduled for an employee who has received or has given notice of separation. Proficiency tests for persons other than A.I.D. FS employees will be scheduled only to determine language training needs and eligibility for incentive pay.

7. The spouse and adult family members of an FS employee with an overseas assignment may be given language proficiency tests in A.I.D. Category A or the incentive language of the employee's country of assignment.

4J. Priorities for Language Training in Washington

Language training will be scheduled as follows:

Priority 1. FS employees assigned to LDPs and career candidates who do not meet A.I.D. language requirements for tenuring.

Priority 2. FS employees assigned to nonlanguage-designated positions at posts where English is not the primary language.

Priority 3. FS employees who need training in languages determined by M/PM to be in critically short supply within the employees' respective backstops.

Priority 4. FS employees who need to acquire proficiency in an A.I.D.-useful language to prepare for future assignments.

Priority 5. GS/GM employees in positions requiring language proficiency.

Priority 6. Spouses and adult family members of employees assigned to posts where English is not the primary language.

4K. Language Training

Training may be on a fulltime or parttime basis in Washington and/or at post, and usually is not continued beyond the S-3/R-3(R-0) proficiency level. For special service-related needs for a higher level, training may be authorized by M/PM/TD in Washington and/or at post.

1. In Washington

Language training in the United States usually is provided by the Foreign Service Institute (FSI) or at an A.I.D.-contracted training facility.

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a. FS Career Candidates

(1) Career candidates (except for backstops 05 and 07) with proficiency in a foreign language will be tested by the FSI no later than 30 days after appointment. Candidates who do not achieve an FSI-tested proficiency for meeting tenuring requirements will be scheduled for language training in an A.I.D.-useful language.

(2) Candidates usually will be enrolled in language training after formal and on-the-job training programs, and immediately prior to departure for post.

(3) If the candidate is assigned to an LDP and does not have the required tested level of language proficiency, training will be scheduled in the required language for the appropriate amount of time to achieve the proficiency level.

(4) Fulltime language training will be curtailed or postponed only when there is no reasonable alternative for meeting urgent Agency staffing needs. Curtailments or postponements must be approved by the Director, M/PM, or IG, as appropriate.

(5) Requests for curtailment or postponement of career candidate language training must be submitted by the overseas post through the Assistant Administrator of the geographic bureau to the appropriate PM office (M/PM/FSP or M/PM/EPM). For career candidates initially assigned to A.I.D./W, requests must be submitted by the bureau/office.

The request must include:

- o specific programmatic reasons for the curtailment or postponement;
- o proposal for an alternate plan providing language training;
- o Mission Director's, AA's or A.I.D./W office head's certification that if the necessary language proficiency is not reached at the end of the first tour or assignment, the employee will remain in the United States following home leave until the required proficiency is achieved;
- o a statement signed by the employee indicating agreement with the request and the alternate training plan, and acknowledging possible consequences including separation from the service for failure to meet language requirements for tenuring.

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If the employee does not agree with the alternate training plan, he/she will remain in A.I.D./W language training for the time required to meet proficiency requirements for tenuring but not to exceed permissible training time (see 4L), after which the employee may proceed to the overseas assignment or may be released from the service subject to Agency needs.

Career candidate language training for employees in the International Development Intern Program (IDIP) will not be postponed or curtailed. Training will be completed prior to assignment to overseas post.

b. Career FS Employees

(1) Reassignment

Employees assigned to A.I.D./W positions who are being reassigned to LDPs and require intensive training are put on the Language Training Complement and enrolled in language training until they reach the required level of proficiency, unless training in whole or in part is waived, terminated, curtailed or postponed.

(2) Home Leave, TDY in A.I.D./W and R&R to the United States

Employees on home leave/transfer or home leave/return to post orders who do not have the designated proficiency requirements shall be assigned to language training in the United States or at a designated overseas training facility for the scheduled training period unless training in whole or in part is waived, terminated, curtailed or postponed. Whenever feasible, employees on TDY or R&R to the United States who do not have the designated proficiency requirements may be assigned to language training.

(3) Direct or Midtour Transfer

(a) Employees reassigned to LDPs through a direct or midtour transfer who do not have the required proficiency level of the position may be enrolled in training in the United States at the request of the receiving post.

(b) Employees who proceed directly to post will be given training at the new post of assignment through the post language program or other resources. If post training is selected, the employee will be scheduled for a language test in A.I.D./W at the beginning of home leave. If required proficiency is not achieved, additional training will be arranged in the United States before the employee returns to post.

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(4) Assignment to Nonlanguage Positions

If an employee is assigned to a nonlanguage position, language training relevant to the country or area may be approved for the employee.

(5) Anticipated Assignment Needs

An employee with no immediate assignment may be reassigned to the Language Training Complement for full-time language training in a language determined by M/PM to be a language shortage skill for the employee's particular or prospective backstop(s). Employees with an A.I.D./W assignment may be trained in such languages, on a part-time, as-available basis.

c. Spouses and Adult Family Members

Language training is encouraged for spouses and adult family members of employees with overseas assignments (see HB 28, Ch. 2).

d. Non-FS Employees

Non-FS employees with a language need may be enrolled, subject to the availability of funds and required approvals (see form A.I.D. 4-470), in language training.

2. At Post

Overseas language training usually is provided through the interagency part-time program administered by the Foreign Service Institute (FSI). For special circumstances, M/PM/TD may authorize language training through other training facilities. If FSI language training programs do not meet operational needs, overseas post, in consultation with M/PM/TD and the geographic bureau or IG, may use operating expenses to train employees under other programs.

a. Employees Without Required Proficiency

Employees who do not have the required language proficiency designated for their position usually will be enrolled in the post language training program. If the required proficiency is not achieved within the planned training period, the Mission Director, Principal A.I.D. Officer or RIG, may, after consulting the employee and in conjunction with the post language officer, terminate training. The employee is responsible for subsequent training or self-study unless adequate progress justifies being reinstated in A.I.D.-financed training.

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b. Individual Instruction

Individual instruction will be provided under an overseas post-funded language training program only if the employee needs it to meet tenuring requirements or is being assigned to a language designated position, but does not meet the proficiency requirement, and if the employee cannot be grouped with other students because of differences in level or because the employee's duties conflict with the class schedule. Individual training is terminated when either of these two conditions no longer exists.

c. PASA and Contract Employees

Language training may be provided to PASA and contract employees only if language training was authorized and funds are available in the underlying agreement/contract.

d. Spouses and Adult Family Members

(1) Spouses and adult family members of FS employees may attend post language training classes subject to funding and space availability.

(2) Spouses and adult family members of PASA and contract employees may receive language training only if language training was authorized and funds are available in the underlying agreement/contract.

4L. Training Performance Standards and Retention/Termination Criteria

The Foreign Service Institute (FSI) and A.I.D.-contracted training facilities regularly assesses the performance and progress of employees in language training classes.

1. Applicability

a. FSI performance standards and retention/termination criteria are applicable to all employees assigned to full-time language training at FSI. Similar periodic reviews and appraisals will be applied to employees trained in A.I.D.-contracted training facilities and testing by FSI will be used to determine retention/termination for marginal students.

2. Performance Reviews

a. After four weeks: If FSI determines that the student will not reach the required proficiency level by the end of the planned training period, FSI will send an "Individual Report" to M/PM/TD. M/PM/TD will send the report to the appropriate office (M/PM/FSP, M/PM/EPM or IG/ADM). The student signs the report and receives a copy from FSI.

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b. During the eighth week: For students whose performance was judged in the four-week report as below average in language training, and whose performance has not progressed to a level that indicates possible successful completion by the end of the planned training period, training will be terminated. FSI will administer a test for the record.

For students whose performance has improved to a level to indicate a possibility that the required proficiency may be reached by the end of the planned training period, training will continue and FSI will prepare regular performance reports.

Students sign the reports in either case and receive copies from FSI. M/PM/TD will send the reports to M/PM/FSP, M/PM/EPM or IG/ADM, as appropriate.

3. Limitations

a. A.I.D. Category A Languages

(1) Beginners whose language requirement is S-2/R-2 are enrolled for 20 weeks of training and are tested during the 20th week. If the S-2/R-2 level is not achieved, training may be extended for four weeks.

For nonbeginners (FSI-tested language proficiency S-1 or higher) who do not achieve the S-2/R-2 level by the end of the planned training period, training may be extended for four weeks.

(2) Beginners whose language requirement is S-3/R-3 are enrolled for 30 weeks of training and are tested during the 20th week. If the S-2/R-2 level is not achieved, training may be extended for four weeks.

If S-2/R-2 is not achieved by the end of 24 weeks, training is terminated.

If the S-2/R-2 level is reached, training is continued and FSI prepares regular performance reports. The Director, M/PM, must approve an extension beyond 24 weeks.

If S-3/R-3 is not achieved upon completion of the originally scheduled training period of 30 weeks, training may be extended for a maximum of six more weeks. The Director, M/PM, must approve an extension beyond 36 weeks.

For nonbeginners who do not achieve the S-3/R-3 level by the end of the planned training period, training may be extended for four weeks.

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b. A.I.D. Incentive Languages

For employees who do not achieve S-2/R-2 (R-0) by the end of the planned training period, training may be extended for four weeks. If S-2/R-2 (R-0) is not achieved by the end of the extension, training is terminated. If the employee is pursuing an S-3/R-3(R-0) proficiency level, FSI will establish planned training and extension periods.

c. Language-Designated Positions

An employee assigned to an LDP who does not possess the required tested level of language proficiency will be assigned for a suitable length of training to enable him/her to gain the proficiency prior to assuming duties at post. If the required level of proficiency is not attained at the end of the training period, the employee is expected to continue training at the post at the highest level of intensity consistent with job requirements, until the designated proficiency is reached.

4M. FSI Performance Reports

1. In addition to regular monthly reports, if at any point during training FSI determines that the required proficiency level will not be attained by the end of the planned training period, FSI will prepare a special report. FSI may recommend an extension or termination; continued training may be authorized within training limitations or further training may be waived. Students sign the report and receive a copy from FSI. M/PM/TD ends copies of all performance reports to M/PM/FSP, M/PM/EPM or IG/ADM, as appropriate.

2. FSI also determines and reports that the required proficiency level may be attained earlier than the planned training period. If so, an early test will be scheduled and, if proficiency is demonstrated, training may be completed early. Students sign the report and receive a copy from FSI. M/PM/TD will send the report to M/PM/FSP, M/PM/EPM or IG/ADM, as appropriate.

4N. Waivers of Language Training in the United States

1. Mission Directors, Principal A.I.D. officers or Assistant Administrators requesting a waiver under emergency conditions must provide detailed written justification. An employee's language competence usually will take precedence over staffing needs.

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2. Upon receipt of written justification, M/PM/FSP, M/PM/EPM or IG/EMS, submits a Request for Waiver of Language Training (Att. 4G) in the United States to M/PM/TD for review and recommendations before transmittal to the Director, M/PM, or the IG. M/PM/FSP or M/PM/EPM informs the post or the appropriate bureau/office of the waiver decision and forwards a copy of the signed waiver to M/PM/TD. The original is filed in the employee's Official Performance File. RIGs forward justifications to IG/ADM for review and recommendations before transmittal to the IG.

3. M/PM/TD prepares an Annual Waiver Report citing the reasons and justifications for requesting the waivers. Annual reports covering waivers processed in a calendar year are completed by the end of January and forwarded to the Director, M/PM. Information from this report may be used in the annual Professional Development Report submitted to Congress.

40. Language Incentive Payments

Language incentive payments will not alter the waiting period of the next regular earned step increase.

1. Testing

a. FS employees who believe they have the required proficiency level to qualify for language incentive pay should request a proficiency test through M/PM/TD. Tests for language incentive pay may be administered at post when authorized by FSI, and are evaluated by FSI-certified examiners.

b. Appeals concerning qualifications for language incentive payments may be made to the Director, M/PM, whose decision is final.

2. Eligibility

FS employees may receive language incentive payments if they have a current (less than five years old) FSI-tested proficiency of S/3-R/3 (R-0) or higher in an incentive language of the post of assignment.

3. Payment Levels

a. For S-3/R-3 (R-0): 10% of base salary.

b. For S-4/R-4 (R-0) or better: 15% of base salary. An employee with an S-4/R-4 (R-N) or higher that is more than five years old upon arrival at post will receive 10% of base salary. If subsequently tested at the S-4/R-4 (R-N) level or better, he/she will receive an additional payment of 5% of base salary.

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c. An employee who receives two test scores of S-4/R-4 (R-0) at least two years apart, or one test score of S-5/R-5 (R-0), is not required to take additional tests in that language to qualify for a language incentive payment.

4. Effective Dates of Payment

Language incentive payments will be effective at the beginning of the first full pay period after recipients' arrival at post.

a. For employees on return-to-post orders, payment will resume effective at the beginning of the first full pay period after the employee's return to post.

c. When a qualifying language test rating is achieved after arrival at post, payment will be effective at the beginning of the first full pay period after the employee passes the test.

d. When a language is added to the incentive language list, payment for qualifying employees will begin at the beginning of the first full pay period after the language is added to the list.

e. An incentive payment will terminate at the end of the pay period during which the employee departs the post for which the incentive payment is made.

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ATTACHMENT 4A

AID INCENTIVE LANGUAGES
(at indicated posts)

This list may be altered as dictated by changes in Agency language and program needs and the opening and closing of overseas post. Changes and additions to the list must be approved by the Director, PFM/PM/OD.

Amharic (Ethiopia)
 Arabic* (Chad, Egypt, Jordan, Mauritania, Morocco, Oman, Sudan, Tunisia, Yemen)
 Bengali* (Bangladesh)
 Burmese* (Burma)
 Chinyanja (Malawi)
 Creole (Haiti)
 Fijian (Fiji)
 Ga (Ghana)
 Hindi* (India)
 Indonesian (Indonesia)
 Mandingo (The Gambia, Guinea, Mali)
 Nepali* (Nepal)
 Philipino/Tagalog (Philippines)
 Sinhala* (Sri Lanka)
 Somali (Somalia)
 Sotho/Sesutho (Lesotho)
 Swahili (Kenya, Uganda, Tanzania)
 Swati (Swaziland)
 Thai* (Thailand)
 Tswana/Setswana (Botswana)
 Urdu* (Pakistan)

Other
 LDP languages, except Category A languages.

*no reading requirement

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ATTACHMENT 4B

A.I.D. TENURING LANGUAGES

A.I.D. Category A Languages (S-2/R-2 or better)

French*
Spanish*
Portuguese*

Other Languages Qualifying for A.I.D. Tenuring

S-2/R-2 or better

Afrikaans
Akan (Twi)
Creole (Haiti)*
Creole (Martinique)
Czech
Danish
Dutch - Flemish
Ewe
Finnish
Ga
Gaelic
German
Hungarian
Icelandic
Indonesian*
Italian*
Malay
Norwegian
Nyanja/Chinyanja
Papiamentu
Pidgin (New Guinea)
Philipino/Tagalog*
Polish
Romanian
Slovak
Slovenian
Somali*
Swahili/Kiswahili*
Swedish
Turkish
Vietnamese
Wolof
Yoruba

S-2/R-0 or better

Amharic
Arabic*
Baule*
Bemba/Cibemba
Bengali*
Bulgarian
Burmese
Cachiquel
Chinese
Croatian
Dari/Afhan Persian
Djerma-Songhai
Ewonda
Fang-Bulu
Farsi/Iranian-Persian
Fijian
Fon
Greek
Gujarati
Hausa
Hebrew
Hindi
Japanese
Khmer/Cambodian
Kinyarwanda
Kirundi/Rundi
Kituba/Munukutaba
Korean
Krio
Lao
Lingala
Macedonian
Malagasy

Maltese
Mandingo
Marathi
Mongolian
More
Motu
Nepali
Pashto
Quechua
Russian
Ryukyuan
Sango
Serbian
Sinhala*
Sotho/Sesutho
Susu
Swati/Siswati*
Taki-Taki, Surinam Creole
Tamil
Thai*
Tsonga
Tswana/Setswana
Ukrainian
Urdu*
Visayan
Wescos

*A.I.D. provides training, as needed

NOTE: Tenuring in above languages is subject to FSI-testing capability.

ATTACHMENT 4CLANGUAGE SKILL LEVEL DESCRIPTIONS
Interagency Language Roundtable (ILR)
SPEAKING

PREFACE

The following descriptions of proficiency levels 0, 1, 2, 3, 4 and 5 characterize spoken-language use. Each higher level implies control of the previous levels' functions and accuracy. The designation 0+, 1+, 2+, etc. will be assigned when proficiency substantially exceeds one skills level and does not fully meet the criteria for the next level. The "plus-level" descriptions, therefore, are subsidiary to the "base-level" descriptions.

A skill level is assigned to a person through an authorized language examination. Examiners assign a level on a variety of performance criteria exemplified in the descriptive statements. The examples illustrate, but do not exhaustively describe, the skills a person may possess or situations in which he/she may function effectively.

Statements describing accuracy refer to typical stages in the development of competence in the most commonly taught languages in formal training programs. In other languages, emerging competence parallels these characterizations, but often with different details.

Unless otherwise specified, the term "native speaker" refers to native speakers of a standard dialect.

"Well-educated," in the context of these proficiency descriptions, does not necessarily imply formal higher education. However, in cultures where formal higher education is common, the language-use abilities of persons who have had such education is considered the standard. That is, such a persons meets contemporary expectations for the formal, careful style of the language, as well as a range of less formal varieties of the language.

These descriptions may be further specified by individual agencies to characterize those aspects of language-use performance of insufficient generality to be included here.

S-0 NO PROFICIENCY

Unable to function in the spoken language. Oral production is limited to occasional isolated words. Has essentially no communicative ability.

S-0 MEMORIZED PROFICIENCY

Able to satisfy immediate needs using rehearsed utterances. Shows little real autonomy of expression, flexibility, or spontaneity. Can ask questions or make statements with reasonable accuracy only with memorized utterances or formulae. Attempts at creating speech usually are unsuccessful.

Examples: The S-0+'s vocabulary usually is limited to areas of immediate survival needs. Most utterances are telegraphic; that is, functors (linking words, markers and the like) are omitted, confused or distorted. An S-0+ usually can differentiate most significant sounds produced in isolation, but, when combined in words or groups of words, errors may be frequent. Even with repetition, communication is severely limited even with persons used to dealing with foreigners. Stress, intonation, tone, etc. usually are quite faulty.

S-1 ELEMENTARY PROFICIENCY (Base Level)

Able to satisfy minimum courtesy requirements and maintain very simple face-to-face conversations on familiar topics. A native speaker must often use slowed speech, repetition, paraphrase or a combination to be understood by an S-1. Similarly, the native speaker must strain and employ real-world knowledge to understand even simple statements/questions from the S-1. An S-1 speaker has a functional, but limited proficiency. Misunderstandings are

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frequent, but the S-1 is able to ask for help and to verify comprehension of native speech in face-to-face interaction. The S-1 is unable to produce continuous discourse except with rehearsed material.

Examples: Structural accuracy is likely to be random or severely limited. Time concepts are vague. Vocabulary is inaccurate, and its range is very narrow. The S-1 often speaks with great difficulty. By repeating, such speakers can make themselves understood to native speakers who are in regular contact with foreigners but there is little precision in the information conveyed. Needs, experience or training may vary greatly from individual to individual; for example, S-1's may have encountered quite different vocabulary areas. However, the S-1 can typically satisfy predictable, simple, personal and accommodation needs; can generally meet courtesy, introduction and identification requirements; exchange greetings; elicit and provide, for example; predictable and skeletal biographical information. An S-1 might give information about business hours, explain routine procedures in a limited way, and state in a simple manner what actions will be taken. The S-1 is able to formulate some questions even in languages with complicated question constructions. Almost every utterance may be characterized by structural errors and errors in basic grammatical relations. Vocabulary is extremely limited and characteristically does not include modifiers. Pronunciation, stress and intonation generally are poor, often heavily influenced by another language. Use of structure and vocabulary is highly imprecise.

S-1+ ELEMENTARY PROFICIENCY (Higher Level)

Can initiate and maintain predictable face-to-face conversations and satisfy limited social demands. The S-1+ may, however, have little understanding of the social conventions of conversation. The interlocutor generally is required to strain and employ real-world knowledge to understand even some simple speech. An S-1+ may hesitate and have to change subjects due to lack of language resources. Range and control of the language are limited. Speech largely consists of a series of short, discrete utterances.

Examples: An S-1+ is able to satisfy most travel and accommodation needs and a limited range of social demands beyond exchanges of skeletal biographic information. Speaking ability may extend beyond immediate survival needs. Accuracy in basic grammatical relations is evident, although not consistent. May exhibit the commoner forms of verb tenses, for example, but may make frequent errors in formation and selection. While some structures are established, errors occur in more complex patterns. The S-1+ typically cannot sustain coherent structures in longer utterances or unfamiliar situations. Ability to describe and give precise information is limited. Person, space and time references often are incorrectly used. Pronunciation is understandable to natives used to dealing with foreigners. Can combine most significant sounds with reasonable comprehensibility, but has difficulty in producing certain sounds in certain positions or in certain combinations. Speech usually will be labored. Frequently has to repeat utterances to be understood by the general public.

S-2 LIMITED WORKING PROFICIENCY (Base Level)

Able to satisfy routine social demands and limited work requirements. Can handle routine work-related interactions that are limited in scope. In more complex and sophisticated work-related tasks, language usage generally disturbs the native speaker. Can handle with confidence, but not with facility, most normal, high-frequency social conversational situations including extensive, but casual conversations about current events, as well as work, family, and autobiographical information. The S-2 can get the gist of most everyday conversations but has some difficulty understanding native speakers in situations that require specialized or sophisticated knowledge. The S-2's utterances are minimally cohesive. Linguistic structure usually is not very elaborate and not thoroughly controlled; errors are frequent. Vocabulary use is appropriate for high-frequency utterances, but unusual or imprecise elsewhere.

Examples: While these interactions will vary from individual to individual, an S-2 typically can ask and answer predictable questions in the workplace and give straight-

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forward instructions to subordinates. Additionally, the S-2 can participate in personal and accommodation-type interactions with elaboration and facility; that is, can give and understand complicated, detailed and extensive directions and make non-routine changes in travel and accommodation arrangements. Simple structures and basic grammatical relations typically are controlled; however, there are areas of weakness. In the commonly taught languages, these may be simple markings such as plurals, articles, linking words and negatives or more complex structures such as tense/aspect usage, case morphology, passive constructions, word order and embedding.

S-2+ LIMITED WORKING PROFICIENCY (Higher Level)

Able to satisfy most work requirements with language usage that is often, but not always acceptable and effective. An S-2+ shows considerable ability to effectively communicate on topics relating to particular interests and special fields of competence. Often shows a high degree of fluency and ease of speech, yet when under tension or pressure, the ability to use the language effectively may deteriorate. Comprehension of normal native speech typically is nearly complete. An S-2+ may miss cultural and local references and may require a native speaker to adjust to his/her limitation in some ways. Native speakers often perceive the S-2+'s speech to contain awkward or inaccurate phrasing of ideas, mis-taken time, space and person references or to be in some way inappropriate, if not strictly incorrect.

Examples: Typically, an S-2+ can participate in most social, formal and informal interactions, but limitations in range of contexts, types of tasks or level of accuracy hinder effectiveness. The S-2+ may be ill at ease with the use of the language either in social interaction or in speaking at length in professional contexts. An S-2+ generally is strong in structural precision or vocabulary, but not in both. Weakness or unevenness in one of the foregoing, or in pronunciation, occasionally results in miscommunication. Normally controls, but cannot always easily produce general vocabulary. Discourse often is incohesive.

S-3 GENERAL PROFESSIONAL PROFICIENCY (Base Level)

Able to speak the language with sufficient structural accuracy and vocabulary to participate effectively in most formal and informal conversations on practical, social and professional topics. Nevertheless, an S-3's limitations generally restrict the professional contexts of language use to matters of shared knowledge and/or international convention. Discourse is cohesive. An S-3 uses the language acceptably, but with some noticeable imperfections; errors virtually never interfere with understanding and rarely disturb the native speaker. An S-3 speaks readily and fills pauses suitably. In face-to-face conversation with natives speaking the standard dialect at a normal rate of speech, comprehension is quite complete. Although cultural references, proverbs, and the implications of nuances and idiom may not be fully understood, the S-3 can easily repair the conversation. Pronunciation may be obviously foreign. Individual sounds are accurate, but stress, intonation and pitch control may be faulty.

Examples: Can typically discuss particular interests and special fields of competence with reasonable ease. Can use the language as part of normal professional duties such as answering objections, clarifying points, justifying decisions, understanding the essence of challenges, stating and defending policy, conducting meetings, delivering briefings, or other extended and elaborate informative monologues. Can reliably elicit information and informed opinion from native speakers. Structural inaccuracy is rarely the major cause of misunderstanding. Use of structural devices is flexible and elaborate. Without searching for words or phrases, an S-3 uses the language clearly and relatively naturally to elaborate concepts freely and make ideas easily understandable to native speakers. Errors occur in low-frequency and highly complex structures.

S-3 GENERAL PROFESSIONAL PROFICIENCY (Higher Level)

Is often able to use the language to satisfy professional needs in a wide range of sophisticated and demanding tasks.

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Examples: Despite obvious strengths, may exhibit some hesitancy, uncertainty, effort or errors that limit the range of language-use tasks that can be reliably performed. Typically there is particular strength in fluency and one or more, but not all, of the following: has breadth of lexicon, including low- and medium-frequency items, especially socio-linguistic/cultural references and nuances of close synonyms; uses structural precision, with sophisticated features that are readily, accurately and appropriately controlled (such as complex modification and embedding in Indo-European languages); has discourse competence in a wide range of contexts and tasks, often matching a native speaker's strategic and organizational abilities and expectations. Occasional patterned errors occur in low frequency and highly-complex structures.

S-4 ADVANCED PROFESSIONAL PROFICIENCY (Base Level)

Able to use the language fluently and accurately on all levels normally pertinent to professional needs. An S-4's language usage and ability to function are fully successful. Organizes discourse well, employing functional rhetorical speech devices, native cultural references and understanding. Language ability rarely hinders him/her in performing any task requiring language; yet, an S-4 would seldom be perceived as a native. Speaks effortlessly and smoothly and is able to use the language with a high degree of effectiveness, reliability and precision for all representational purposes within the range of personal and professional experience and scope of responsibilities. Can serve as an informal interpreter in a range of unpredictable circumstances. Can perform extensive, sophisticated language tasks, encompassing most matters of interest to well-educated native speakers, including tasks that do not bear directly on a professional specialty.

Examples: Can discuss in detail concepts that are fundamentally different from those of the target culture and make those concepts clear and accessible to the native speaker. Similarly, an S-4 can understand the details and ramifications of concepts that are culturally or conceptually different from his/her own. Can set the tone of interpersonal official, semi-official and non-professional verbal exchanges with a representative range of native speakers (in a range of varied audiences; purposes, tasks, and settings). Can play an effective role among native speakers in such contexts as conferences, lectures and debates on matters of disagreement. Can advocate a position at length, formally and in chance encounters, using sophisticated verbal strategies. Can understand and reliably produce shifts of both subject matter and tone. Can understand native speakers of the standard and other major dialects in essentially any face-to-face interaction.

S-4 ADVANCED PROFESSIONAL PROFICIENCY (Higher Level)

Speaking proficiency is regularly superior in all respects, usually equivalent to that of a well-educated, highly articulate native speaker. Language ability does not impede the performance of any language-use task. However, an S-4+ would not necessarily be perceived as culturally native.

Examples: An S-4+ organizes discourse well employing functional rhetorical speech devices, native cultural references and understanding. Effectively applies a native speaker's social and circumstantial knowledge. However, cannot sustain that performance under all circumstances. While an S-4+ has a wide range and control of vocabulary and phrasing that is rarely imprecise, yet there are occasional weaknesses in idioms, colloquialisms, pronunciation, cultural reference or there may be an occasional failure to interact in a totally native manner.

S-5 FUNCTIONALLY NATIVE PROFICIENCY

Speaking proficiency is functionally equivalent to that of a highly articulate well-educated native speaker and reflects the cultural standards of the country where the language is natively spoken. An S-5 uses the language with complete flexibility and intuition, so that speech on all levels is fully accepted by well-educated native speakers in all of its features, including breadth of vocabulary and idiom, colloquialisms and pertinent cultural references. Pronunciation typically is consistent with that of well-educated native speakers of a non-stigmatized dialect.

LANGUAGE SKILL LEVEL DESCRIPTIONS
Interagency Language Roundtable (ILR)
READING

PREFACE

In the following descriptions a standard set of text-types is associated with each level. The text-type generally is characterized in each descriptive statement.

The word "read," in the context of these proficiency descriptions, means that the person at a given skill level can thoroughly understand the communicative intent in the text-types described. In the usual case the reader could be expected to make a full representation, thorough summary or translation of the text into English.

Other useful operations can be performed on written texts that do not require the ability to "read," as defined above. Examples of such tasks that persons of a given skill level may reasonably be expected to perform are provided, when appropriate, in the descriptions.

R-0 NO PROFICIENCY

No practical ability to read the language. Consistently misunderstands or cannot comprehend at all.

R-0+ MEMORIZED PROFICIENCY

Can recognize all the letters in the printed version of an alphabetic system and high-frequency elements of a syllabary or a character system. Able to read some or all of the following: numbers, isolated words and phrases, personal and place names, street signs, office and shop designations. The above often interpreted inaccurately. Unable to read connected prose.

R-1 ELEMENTARY PROFICIENCY (Base Level)

Sufficient comprehension to read very simple connected written material in a form equivalent to usual printing or typescript. Can read either representations of familiar formulaic verbal exchanges or simple language containing only the highest frequency structural patterns and vocabulary, including shared international vocabulary items and cognates (when appropriate). Able to read and understand known language elements that have been recombined in new ways to achieve different meanings at a similar level of simplicity. Texts may include simple narratives of routine behavior; highly predictable descriptions of persons, places or things; and explanations of geography and government such as those simplified for tourists. Some misunderstandings possible on simple texts. Can get some main ideas and locate prominent items of professional significance in more complex texts. Can identify general subject matter in some authentic texts.

R-1+ ELEMENTARY PROFICIENCY (Higher Level)

Sufficient comprehension to understand simple discourse in printed form for informative social purposes. Can read material such as announcements of public events, simple prose containing biographical information or narration of events, and straightforward newspaper headlines. Can guess at unfamiliar vocabulary if highly contextualized, but with difficulty in unfamiliar contexts. Can get some main ideas and locate routine information of professional significance in more complex texts. Can follow essential points of written discussion at an elementary level on topics in his/her special professional field.

In commonly taught languages, an R-1+ may not control the structure well. For example, basic grammatical relations are often misinterpreted, and temporal reference may rely primarily on lexical items as time indicators. Has some difficulty with the cohesive factors in discourse, such as matching pronouns with referents. May have to read materials several times for understanding.

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R-2 LIMITED WORKING PROFICIENCY (Base Level)

Sufficient comprehension to read simple, authentic written material in a form equivalent to usual printing or typescript on subjects within a familiar context. Able to read with some misunderstandings straightforward, familiar, factual material, but in general insufficiently experienced with the language to draw inferences directly from the linguistic aspects of the text. Can locate and understand the main ideas and details in material written for the general reader. However, persons who have professional knowledge of a subject may be able to summarize or perform sorting and locating tasks with written texts that are well beyond their general proficiency level. The R-2 can read uncomplicated, but authentic prose on familiar subjects that are normally presented in a predictable sequence that aids the reader in understanding. Texts may include descriptions and narrations in contexts such as news items describing frequently occurring events, simple biographical information, social notices, formulaic business letters and simple technical material written for the general reader. Generally, the prose that can be read by an R-2 is predominantly in straight-forward/high-frequency sentence patterns. The R-2 does not have a broad active vocabulary (that is, which he/she recognizes immediately on sight), but is able to use contextual and real-world cues to understand the text. Characteristically, the R-2 is quite slow in performing such a process. Is typically able to answer factual questions about authentic texts of the types described above.

R-2+ LIMITED WORKING PROFICIENCY (Higher Level)

Sufficient comprehension to understand most factual material in non-technical prose as well as some discussions on concrete topics related to special professional interests. Is markedly more proficient at reading materials on a familiar topic. Is able to separate the main ideas and details from lesser ones and uses that distinction to advance understanding. The R-2+ is able to use linguistic context and real-world knowledge to make sensible guesses about unfamiliar material. Has a broad active reading vocabulary. The R-2+ is able to get the gist of main and subsidiary ideas in texts that could only be read thoroughly by persons with much higher proficiencies. Weaknesses include slowness, uncertainty, inability to discern nuance and/or intentionally disguised meaning.

R-3 GENERAL PROFESSIONAL PROFICIENCY (Base Level)

Able to read within a normal range of speed and with almost complete comprehension a variety of authentic prose material on unfamiliar subjects. Reading ability is not dependent on subject matter knowledge, although it is not expected that an R-3 can comprehend thoroughly subject matter that is highly dependent on cultural knowledge or that is outside his/her general experience and not accompanied by explanation. Text-types include news stories similar to wire service reports or international news items in major periodicals, routine correspondence, general reports, and technical material in his/her professional field; all of these may include hypothesis, argumentation, and supported opinions. Misreading rare. Almost always able to interpret material correctly, relate ideas, and "read between the lines," (that is, understand the writers' implicit intents in texts of the above types). Can get the gist of more sophisticated texts, but may be unable to detect or understand subtlety and nuance. Rarely has to pause over or reread general vocabulary. However, may experience some difficulty with unusually complex structure and low frequency idioms.

R-3+ GENERAL PROFESSIONAL PROFICIENCY (Higher Level)

Can comprehend a variety of styles and forms pertinent to professional needs. Rarely misinterprets such texts or rarely experiences difficulty relating ideas or making inferences. Able to comprehend many sociolinguistic and cultural references. However, may miss some nuances and subtleties. Able to comprehend a considerable range of intentionally complex structures, low frequency idioms and uncommon connotative intentions; however, accuracy is not complete. The R-3+ typically is able to read with facility, understand and appreciate contemporary expository, technical or literary texts that do not rely heavily on slang and unusual idioms.

R-4 ADVANCED PROFESSIONAL PROFICIENCY (Base Level)

Able to read fluently and accurately all styles and forms of the language pertinent to professional needs. The R-4's experience with the written language is extensive enough that he/she is able to relate inferences in the text to real-world knowledge and understand almost all sociolinguistic and cultural references. Able to "read beyond the lines" (that is, to understand the full ramifications of texts as they are situated in the wider cultural, political or social environment). Able to read and understand the intent of writers' use of nuance and subtlety. An R-4 can discern relationships among sophisticated written materials in the context of broad experience. Can follow unpredictable turns of thought readily in, for example, editorial, conjectural and literary texts in any subject matter area directed to the general reader. Can read essentially all professional documents and correspondence. Recognizes all professionally relevant vocabulary known to the educated non-professional native, although may have some difficulty with slang. Can read reasonably legible handwriting without difficulty. Accuracy is often nearly that of well-educated native reader.

R-4 ADVANCED PROFESSIONAL PROFICIENCY (Higher Level)

Nearly native ability to read and understand extremely difficult or abstract prose, a very wide variety of vocabulary, idioms, colloquialisms and slang. Strong sensitivity to and understanding of sociolinguistic and cultural references. Little difficulty in reading less than fully legible handwriting. Broad ability to "read beyond the lines" (that is, to understand the full ramifications of texts as they are situated in the wider cultural, political or social environment) is nearly that of a well-read or well-educated native reader. Accuracy is close to that of the well-educated native reader, but not equivalent.

R-5 FUNCTIONALLY NATIVE PROFICIENCY

Reading proficiency is functionally equivalent to that of the well-educated native reader. Can read extremely difficult and abstract prose, for example, general legal and technical as well as highly colloquial writings. Able to read literary texts, typically including contemporary avant-garde prose, poetry and theatrical writing. Can read classical/archaic forms of literature with the same degree of facility as the well-educated, but non-specialist native. Reads and understands a wide variety of vocabulary and idioms, colloquialisms, slang and pertinent cultural references. With varying degrees of difficulty, can read all kinds of handwritten documents. Accuracy of comprehension is equivalent to that of a well-educated native reader.

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ATTACHMENT 4D

SAMPLE MEMORANDUM
(for use by M/PM/FSP, M/PM/EPM and IG/ADM)

TO:

FROM:

SUBJECT: Language Training Performance Standards and Reporting Procedures

The Foreign Service Institute (FSI) regularly assesses the performance and progress of employees in language training. FSI performance standards and reporting procedures, including language retention/termination criteria, are as follows:

1. After 4 weeks instruction: If it is FSI's judgment that performance is below average in language training and that the student will not reach the required proficiency level within the scheduled training period, FSI will complete an "Individual Report" to inform A.I.D. (M/PM/TD). The student signs the report and receives a copy from FSI. M/PM/TD sends the report to M/PM/FSP, M/PM/EPM or IG/ADM.

1. During the 8th week of training: For students whose performance was judged in the fourth week report as below average in language training, FSI will report that the student's performance:

a. basically is unchanged since the fourth week of training, in which case language training is discontinued at the end of the eighth week of training with an FSI test given for the record. The student signs the report and receives a copy from FSI. M/PM/TD sends the report to M/PM/FSP or IG/ADM, as appropriate, or

b. has sufficiently improved to indicate the possibility that the required proficiency may be reached during the training period scheduled, in which case training continues and FSI reports regularly on performance thereafter.

3. Training Limitations in AID Category A Languages

a. Beginners whose language requirement is S-2/R-2 are enrolled for 20 weeks of training and are tested during the 20th week. If the S-2/R-2 level is not achieved, training may be extended by a maximum of four weeks. For nonbeginners (FSI-tested language proficiency S-1 or higher) who do not achieve the S-2/R-2 level within the training period established by FSI, training may be extended for a maximum of four weeks. If S-2/R-2 is not achieved upon completion of training extensions(s), language training is terminated (see 6a).

b. Beginners whose language requirement is S-3/R-3 are enrolled for 30 weeks of training and are tested during the 20th week. If the S-2/R-2 level is not achieved during the 20th week, language training may be extended for a maximum of four weeks. If S-2/R-2 is not achieved during the four-week extension, language training is terminated (see 6a). If the S-2/R-2 level is reached, language training continues and FSI regularly reports on performance thereafter. If S-3/R-3 is not achieved upon completion of the originally scheduled training period (30 weeks), training may be extended up to six more weeks for a maximum total of 36 weeks. Additional extensions require the approval of the Director, Personnel Management. For nonbeginners who do not achieve the S-3/R-3 level upon completion of the FSI-established training period, training may be extended for a maximum of six weeks. If S-3/R-3 is not achieved upon completion of training extensions(s), language training is terminated (see 6a).

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4. Training Limitations in A.I.D. Incentive Languages

For employees who do not achieve S-2/R-2 (R-0) within the FSI-established training period, training may be extended for a maximum of four weeks. If S-2/R-2 (R-0) is not achieved upon completion of training extensions(s), language training is terminated (see 6a). If the employee is pursuing an S-3/R-3 (R-0) proficiency level, scheduling shall be as specified by FSI with extensions and terminations (see 3b).

5. Career Candidates

When language training is terminated for career candidates, including SFS candidates, they may be retained in the Service under limited appointment providing them the opportunity to meet language requirements for tenuring through self-study or A.I.D. parttime group programs, e.g., early morning, noontime or post language programs. However, such a continuation of service shall not in any way restrict the rights of the Agency to terminate the employee's limited appointment at any time.

6. FSI Performance Reports

a. In addition to regular monthly reports, if at any point during training FSI determines that the required proficiency level will not be attained at the end of the planned training period, FSI will issue a special report. An extension or termination of training may be recommended. Continued training may be authorized within training limitations (see 3 and 4) or further training may be waived. Actions with respect thereto shall be denied upon by M/PM.

Students sign the FSI report and receive a copy from FSI. M/PM/TD send copies of all performance reports to M/PM/FSP, M/PM/EPM or IG/ADM.

b. FSI also determines and reports that the required proficiency level may be attained earlier than the planned training period. If so, an early test will be scheduled and, if proficiency is demonstrated, training may be completed early. Students sign the report and receive a copy from FSI. M/PM/TD sends a copy of the report to M/PM/FSP, M/PM/EPM or IG/ADM.

c. For all direct-hire employees enrolled in fulltime language training, M/PM/FSP is responsible for including the final FSI performance report in the Employee's Performance File (EPF).

I have read and I understand the policy outlined in this document.

signature

date

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ATTACHMENT 4E

GUIDELINES

Language Designations of Overseas A.I.D. Positions

1. Mission Directors, Principal A.I.D. Officers and the Inspector General (IG) annually designate and review the foreign language and level of proficiency requirements for each overseas FS position and certify that it conforms to established criteria (para 2). All language designations will relate to position needs. Recommendations for changes to existing language-designated positions are made through submission of a SPAR, which includes a statement justifying changes. A memorandum (App. 4F) of certification signed by the Mission Director, Principal A.I.D. officer or IG, together with SPARs, as appropriate, is forwarded to PM/TD no later than March 31. Changes in proficiency requirements during the year, i.e. between annual reviews, should be avoided, especially in the case of positions to be included in the next vacancy announcement of A.I.D.'s Foreign Service Assignment System. Positions created after the annual exercise will be reviewed for language designation on an ad hoc basis.

2. In conducting the review and arriving at language proficiency designations, Mission Directors/Principal A.I.D. Officers/IG will consider:

- program responsibilities of the overseas post;
- job content and contacts expected of incumbent;
- representative/social contacts;
- extent of the use of English in the country;
- host country requirements for proficiency in English by its officials who serve in counterpart positions (this judgment is not to be based on an individual's knowledge of English);
- host country's attitude and acceptance of the use of English in the local setting;
- conduct of official business and development of useful working relations with host country officials and other significant A.I.D. contacts;
- direct supervision of foreign national employees with less than good working knowledge of English;
- dealing with the general public on a continuing basis, including conduct of interviews;
- reading written materials in a local language;
- monitoring translations made by foreign national employees or translating documents in the local language whose sensitivity requires handling by U.S. personnel.

3. LDP requirements will be assigned an S-2 or S-3 level and R-0 to R-3 level, as appropriate. S-3/SR-3 is the highest proficiency level usually accorded an A.I.D. position.

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ATTACHMENT 4F

SAMPLE MEMORANDUM

TO: M/PM/TD

FROM:

SUBJECT: Annual Review of Position Language Requirements

After reviewing each of the positions in the Mission, I certify that, in my judgment, the foreign language proficiency levels required, as indicated in the current staffing pattern (together with any changes recommended in the attached SPARs) conform to the principles set forth in Handbook 28.

(If no changes are recommended, use the same form eliminating phrase in parentheses.)

(If changes are recommended, provide justification on each attached SPAR.)

Mission Director signature

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ATTACHMENT 4G

Date:

TO : M/PM/OD

THRU : M/PM/TD

FROM : M/PM/FSP

SUBJECT: Request for Waiver of Language Training in the United States
(Handbook 28, Chapter 4)

TYPE OF EMPLOYEE (check one): Career Career Candidate

EMPLOYEE NAME: _____

MLAT SCORE: _____

COUNTRY OF ASSIGNMENT: _____

POSITION LANGUAGE REQUIREMENT: S-

POSITION TITLE: _____

POSNO: _____

JUSTIFICATION:

PM/TD RECOMMENDATION:

PM/OD DECISION

Waiver Approved

SIGNATURE: _____

Waiver Disapproved

TITLE: _____

DATE: _____

cc: M/PM/TD (after signature by M/PM/OD)

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ATTACHMENT 4H

APPLICATION FOR LANGUAGE TRAINING

The following statement is required to be attached to the subject form by the Privacy Act of 1974 (Public Law 93-579; 88 Statute 1896).

The information requested on the attached form is necessary for and prerequisite to consideration of your application for language training. The Foreign Service Act of 1946, as amended, constitutes authority for requesting this information. If any training is authorized to be given by an organization outside the Agency, the information you provide may be disclosed to such outside organization to allow it to evaluate your qualifications and to plan the training program. Disclosure of information provided also may be made without your written consent outside the Agency, if required, (a) pursuant to any other applicable routine use under A.I.D.'s Training and Orientation Records System, A.I.D. Regulation 13, Notice of Systems of Records, for implementing the Privacy Act as published in the Federal Register, or (b) when disclosure without the consent of the individual concerned is authorized by the Privacy Act and provided for in A.I.D. Regulation 15.

A copy of the Regulation and Notice of Systems of Records is available from A.I.D. Distribution.

You are requested, but not required, to enter your social security number in Box 1.A. Social security numbers are used to enter in and retrieve information from the Agency's computerized personnel records. This procedure antedates the passage of the Privacy Act.

ATTACHMENT 4I

APPLICATION FOR LANGUAGE TRAINING

GENERAL INSTRUCTIONS - This form must be typed and prepared in accordance with the instructions in Handbook 28, Chapter 4. DO NOT remove any copies prior to submission. The 'Employee's Agreement to Continue in Service' is on the reverse of the Official Personnel File copy. See the reverse of the Employee's Copy for the 'Privacy Act Statement'.

SECTION A - TRAINEE INFORMATION AND TRAINING DATA

1. Trainee's Name (Last, First, Middle Initial)		2. Social Security Number	3. Pay Plan - Grade	4. Date of Birth	5. Sex
6. Position Title			7. a. Current Office Assignment b. Telephone Number		
9. Proposed Overseas Assignment		10. If Trainee is Family Member, Provide Employee's Name Title		11. Language Requested	12. Requirement \$ - R -
13. Position Req. (For Overseas Only)		14. Current Proficiency Self-Appraised FSI Tested S - R - S - R -			
15. Purpose of Training <input type="checkbox"/> LDP <input type="checkbox"/> TENURING <input type="checkbox"/> OTHER (describe in item 16)		16. Briefly and Specifically Describe How the Language Training Requested is Job-Related			
17. Indicate Previous Foreign Language(s) Studied		18. Type of Training Requested <input type="checkbox"/> FULL-TIME (8 hours/day - 5 days/week) <input type="checkbox"/> PART-TIME (days preferred) (hours preferred)		19. Dates Available for Training From To	

SECTION B - APPROVALS I certify that the training requested above is in the public interest and within the limitations and requirements set forth in AID Handbook 28, Chapter 4, Foreign Language Program.

20. For Employees Assigned in Washington

a. Typed Name of Immediate Supervisor	Title	b. Typed Name of Admin/Mgmt Officer	Title
Office	Telephone Number	Office	Telephone Number
Signature	Date	Signature	Date

21. For PASA/RSSA/Contractor Employees I certify that funds are available and reserved in the Agreement and/or Contract for the training requested and conforms with needs set forth in Agreement/Contract.

a. Typed Name of AID Project Officer	Title	b. Typed Name of AID Contracting Officer	Title
Office	Telephone Number	Office	Telephone Number
Signature	Date	Signature	Date

22. For Employees/Family Members Assigned Overseas

23. Authorizing Official M/PM/TD

Personal Officer Requesting Training M/PM/FSP or M/PM/EPM		Typed Name		Title	Telephone Number
Typed Name		Telephone Number			
Signature	Counselor's Initials	Date	Signature	<input type="checkbox"/> Approved <input type="checkbox"/> Disapproved	Date

SECTION C - TO BE COMPLETED BY LANGUAGE OFFICE

Training Facility	Language Training Dates From To	FY	Type of Training FULL-TIME - Weeks PART-TIME - Hours
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LANGUAGE PROFICIENCY RATING

Pre-Training Tested S - R -		Self-Appraised	Post Training Tested S - R -	
Additional Remarks				

SAMPLE

SECTION D - ESTIMATED TRAINING COSTS (To be completed by M/PM/TD)

24. Direct Costs and Appropriation/Fund Chargeable		Appropriation	
a. Tuition	\$	Allotment	
b. Books/Materials	\$	Obligating Document Number	
c. Other	\$	Goal	
TOTAL ESTIMATED COSTS	\$	Activity	
		Other	

25. M/PM/TD Funding Approval			
Typed Name	Title	Signature	Date

AID HANDBOOK CIRCULAR	HB 28	CHAP. 5	TRANS. MEMO NUMBER 28:49	EFFECTIVE DATE Oct. 1, 1990	PAGE NO. 1
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This circular is temporarily filed in front of Handbook 28, Ch. 5, International Development Intern Program, pending revision of the chapter.

1. Purpose

This circular establishes the requirements and procedures qualified employees must meet and follow to enter the Agency's International Development Intern Program (IDIP).

2. Applicability

This circular applies to all AID Civil Service (CS) employees and Presidential Management Interns (PMIs).

3. Authorities and References

- a. Foreign Service Act of 1980, as amended, sec. 302(a), 3030, 306, 703
- b. HB, 25, Ch. 25, Foreign Service Appointments
- c. 5 CFR 213.3102(ii), Positions of Presidential Intern, 315.708, Conversion based on service as a PMI
- d. FPM 362, Presidential Management Intern Program

4. Definition

Presidential Management Intern. A U.S. citizen appointed in the excepted service in an executive agency or department who has completed a graduate course of study at a qualified college or university, received a nomination from the dean or academic program director, passed a U.S. Office of Personnel Management-administered screening process and been selected by a U.S. agency for a two-year Presidential Management internship.

5. Qualifications

a. CS employees applying for the IDIP must have career status, a bachelor's degree in any discipline from an accredited institution, and three years of relevant experience with at least two years of AID experience. Certain occupations, e.g., accountant, auditor, engineer and economist, require specific degrees.

b. PMIs must be employed by the Agency for the full two year period of their internship, and must successfully complete the PMI Program while employed by the Agency. PMI participants employed by the Agency prior to October 1, 1990, are exempt from the two-year AID-employment requirement.

6. Policy

All policies, procedures, regulations, requirements and conditions specified in HB 25, Ch. 5, including but not limited to selection, tenure, training and evaluation, for CS employees and PMIs entering the IDIP, are the same as for all other IDIs except as specified in this circular.

7. Procedures

a. Applications are submitted to the Recruitment Staff (PM/R).

--PMIs may apply as early as 120 days prior to completion of the PMI Program. Entry into the IDIP is contingent upon successful completion of the PMI Program.

--All applicants must cite the occupational category for which they are applying and submit a one-page essay describing their reasons for pursuing an FS career.

--PMIs must include an endorsement by their supervisor or designated mentor stating the PMI's potential in the Foreign Service.

b. PM/R convenes and chairs the appropriate Technical Review Committee (TRC) to interview qualified applicants.

--Applicants will not be subject to the paper review/ranking process specified in Ch. 5, but will be interviewed by a TRC and scored using current interview criteria.

--Applicants recommended for entry into the IDIP will be included on the "Highly Qualified Roster" and be given priority consideration for entry into the current IDIP. Applicants on the Highly Qualified Roster are not guaranteed jobs. Applicants should consult with a career development officer to discuss the advantages/disadvantages of the different methods an individual may enter the Agency's Foreign Service.

8. Salary

The salary and grade of CS employees and PMIs entering the IDIP will be linked to an equivalent FS salary and grade, as follows:

<u>GS Grade</u>	<u>FS Grade</u>	<u>GS Grade</u>	<u>FS Grade</u>
GS-12	FP-04	GS-8	FP-07
GS-11, Steps 6-10	FP-04	GS-7	FP-08
GS-11, Steps 1-5	FP-05	GS-6	FP-09
GS-10	FP-05	GS-5	FP-09
GS-9	FP-06		

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CHAPTER 5

INTERNATIONAL DEVELOPMENT INTERN PROGRAM (IDIP)

5A. Purpose

This chapter provides the policies, regulations and procedures governing all aspects of the International Development Intern Program (IDIP).

5B. Applicability

This chapter applies to all individuals assigned to the International Development Intern Program after September 1, 1986.

5C. Authorities and References

1. Sections 302(a), 303, 306 and 703, Foreign Service Act of 1980 (the Act).
2. Handbook 25, Chapter 35, Foreign Service Appointments.

5D. Definitions

1. Career Development Officer (CDO) - A full-time counselor responsible for a specific occupational category who will serve as program coordinator, assist the IDI supervisor in the development of individual training plans, monitor the training aspects of the program, provide counseling in the areas of career progression and performance strengths and weaknesses and ensure that required training and performance evaluations are obtained. In addition, the CDO will in consultation with the Regional Bureaus recommend the initial overseas assignment, ensuring that there will be a qualified officer at post to provide training to the IDI. The CDO will also serve as a member of the Technical Review Committee (TRC).

2. International Development Intern Program (IDIP) - A program that provides specialized and concentrated training to highly qualified entry level professionals as they launch their foreign service careers with AID. The IDI program will provide potential career officers with the training and exposure needed for growth in AID. The program normally will last two years plus the time that may be necessary for language training. After completing the program, IDIs are conditionally integrated into AID's career service. They become full-fledged career employees when they make the transition from conditional status to full tenure, usually three to four years after commencing the IDI program. Current Foreign Service members may apply for the IDIP.

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3. IDIP Graduation Panel - A panel convened by the Director, Office of Personnel Management (M/PM), to review the files of participants who have completed one year of overseas on-the-job training (OJT). Each panel will include the IDIP Review Panel members; the Deputy Director, M/PM, or designee, who will act as Chairperson; and an Office of Equal Opportunity Programs (EOP) representative, who will serve as a non-voting member.

4. IDIP Review Panel - A panel convened by the Director, M/PM, or designee to review the files of participants who have completed AID/W OJT to determine if they have successfully completed the Washington phase of the program and are ready for overseas assignment. The panel consists of the following members with one vote each: the Chief, Foreign Service Personnel Division (M/PM/FSP), or designee, who serves as Chairperson; the appropriate CDO; the Director of the parent office for the occupational category being reviewed; and/or the Director of the Technical Office in the Regional Bureau where the participant is assigned. EOP will serve as a nonvoting member. Decisions will be by majority vote. In the event of a tie, M/PM/FSP will cast only one vote.

5. IDIP Training Plan - A training plan prepared by the IDI's supervisor at the outset of AID/W OJT and prior to overseas OJT. The training plan establishes the duration and composition of training based on each participant's background and experience. Each plan will include appropriate classroom training. It may be modified during the training. Training objectives and responsibilities will be stated in the plan. IDIs should sign off on and be given a copy of this plan.

6. Employee Evaluation Report (EER) - The form used for evaluating participants during AID/W OJT assignments of two or more months. For AID/W OJT of less than two months, the supervisor will submit the evaluation by memorandum which will be signed by the Reviewing Officer and IDI. An evaluation of classroom training will be obtained, if appropriate. For overseas OJT, regular Foreign Service evaluation reports will be used (see HB 25, Ch. 10).

7. Technical Review Committee (TRC) - Committee convened by the Chief of the Recruitment Staff (M/PM/FSP/RSS) and composed of the appropriate CDO and technical officers representing the various occupational categories. For the IDIP, the TRC will review technical qualifications, interview applicants, and recommend selections. The TRC will also develop training plans for a backstop to be used by the CDO and IDI supervisor in the development of specific training plans (see HB 25, Ch. 31, for additional information on the TRC).

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8. Tenure Board - A board established by M/PM to review the official performance files of candidates certified to it for consideration. The Tenure Board makes recommendations to the Director, M/PM, concerning the development, tenuring or termination of career candidates. (See HB 25, Supplement 5C.)

5E. Appointment Policies and Conditions

1. The conditions and requirements of HB 25, Ch. 5, apply to new appointees participating in AID's IDIP.
2. IDIP participants will be given an initial 45-month appointment as a career candidate.
3. Foreign Service members participating on an excursion basis will continue under the conditions of their ongoing appointments.
4. The regulations governing repayment liabilities due to separation prior to completion of an assignment apply to IDIP participants. (See provisions of HB 30, Ch. 1, and HB 27, Ch. 5.)
5. The IDIP may not be used to recruit specialists for whom the Agency has limited long-term needs. Such needs should be met by non-career or Participating Agency Service Agreement appointments or contractors.

5F. Responsibilities

1. Director, Office of Personnel Management (M/PM)

The Director, M/PM, is responsible for the overall management of AID's IDIP program and performs the following specific functions:

- a. Determines the number of IDIPs and their composition for each fiscal year.
- b. Reviews selections for the IDIP program to ensure compliance with affirmative action and Agency employment and programmatic goals.
- c. Convenes the IDIP Review Panel after AID/W OJT and the IDIP Graduation Panel after overseas OJT and approves or disapproves the Panel's recommendations.
- d. Certifies in writing that participants have completed the program and/or makes decisions regarding extensions or terminations.

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2. Chief, Recruitment Staff (M/PM/FSP/RSS)

The Chief, M/PM/FSP/RSS, is responsible for conducting or coordinating the following IDIP recruitment activities:

a. Develops information about the program, in consultation with the TRC, and disseminates it to trade journals, institutions (e.g., universities, the Peace Corps, private and voluntary organizations and field missions) and other sources of candidates.

b. Ensures that AID personnel have an opportunity to apply for the program.

c. Maintains records of all applications and acknowledges them.

d. Screens applications for minimum requirements and forwards those of eligible applicants to the TRC.

e. Convenes the TRC for review of technical qualifications and conduct of interviews.

f. Serves as chairperson of the TRC and provides TRC staff support.

g. Provides guidance to overseas missions conducting interviews of applicants at their posts.

3. Chief, Foreign Service Personnel Division (M/PM/FSP)

The Chief, M/PM/FSP, is responsible for all pre-employment processing and the appointment of IDIs as follows:

a. Determines the grade and step of appointment.

b. Requests security and medical clearances.

c. Serves as chairperson of the IDIP Review Panel.

d. Makes recommendations to the Director, M/PM, on proposed selections for the program.

e. Serves as a member of the IDIP Graduation Panel.

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4. Chief, Training Division (M/PM/TD)

The Chief, M/PM/TD, arranges all formal training aspects of the program, including funding training courses and seminars.

5. Technical Review Committee (TRC)

a. Reviews candidate applications and participates in selection interviews.

b. Develops a training plan for each occupational speciality for use as a guide by supervisors in designing specific training plans.

6. Career Development Officer (CDO)

a. Provides career progression and performance counseling to participants.

b. Assists in developing individual training plans and ensures that the target mission receives copies.

c. Monitors individual training programs.

d. Ensures that evaluations for all phases of the training program are prepared and placed in the participants' official performance files.

e. Serves as liaison with mission of assignment, advising the mission of specific training received in AID/W, and the IDI's progress.

7. Mission/Office Director and AID/W Office Director

a. Design training plan.

b. Provide daily guidance in performance of OJT. The substance of such guidance will result from collaboration between the Office Director and the Career Development Officer.

c. Provide daily supervision to participant.

d. Prepare performance evaluations for periods of service in their organizations.

e. Provide counseling on performance.

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8. Office of Equal Opportunity Programs (EOP)

a. Advises M/PM/FSP on affirmative action and equal employment opportunity matters related to selection, training, assignment, evaluation and retention (e.g., identification of barriers to selection, assignment, evaluation and retention) of minorities and women.

b. Serves as a nonvoting member on the TRC, the IDIP Review Panel and the IDIP Graduation Panel.

5G. Number and Composition of IDIPs

1. The overall number of IDIs to be hired each fiscal year will be based on work force planning projections. The determination will be made by M/PM in consultation with appropriate Bureaus and Offices.

2. IDIP composition will be based on projected Agency needs in the various occupational categories.

5H. Recruitment and Selection

1. M/PM/FSP/RSS will recruit for IDIPs consistent with the numbers and composition determined in paragraph 5G above.

2. M/PM/FSP/RSS records and acknowledges all preliminary inquiries, and screens all applications to determine those who meet minimum requirements.

3. The TRC, chaired by M/PM/FSP/RSS, reviews the technical qualifications of all applicants referred by M/PM/FSP/RSS and establishes a rank-order list of the most highly qualified applicants for interviews. A sufficient number of applicants are interviewed to ensure that the target number for an occupational category will be met and that the selection process will be competitive.

4. Upon completion of interviews, the TRC identifies the applicants who meet program criteria and are eligible to be processed for the IDIP. The TRC forwards an alphabetical list of the most highly qualified candidates with recommendations to the Director, M/PM, for final selection approval.

5I Training

1. Participants usually are in training status for two years plus time for language training, if needed. Training conducted in the United States consists of six week entry orientation, classroom instruction

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(short formal training courses appropriate to occupational category which can include technical, managerial and supervisory skills), OJT and language training as required.

2. After orientation, participants are assigned to AID/W Offices or Bureaus appropriate to their occupational category to provide them with the broadest base of knowledge and training in their target category. AID/W OJT will be for not more than one year (or a shorter period based on the participant's background and experience) exclusive of language training. Within the one year time limit, the length and type of AID/W training is determined by the IDI's CDO and supervisor and indicated in each participant's training plan. The training plan will be signed by the IDI and included in the evaluation folder.

3. During the first three months of AID/W OJT, the CDO, in consultation with the Regional Bureaus, will identify the missions to which participants will be assigned for overseas OJT. Assignments normally will be to missions where onward assignment opportunity exists and where participants will receive adequate training and supervision.

4. To ensure that tenuring prospects are not adversely affected, participants normally will be assigned overseas not later than 18 months after appointment (including language training).

5. Upon completion of AID/W OJT, the participant is assigned to a mission for an additional year of OJT. This OJT will be performed in the office related to the participant's target specialty and the Director of that office will submit a formal training plan to the CDO for review.

6. Applicants indicating a proficiency in French or Spanish will be tested prior to entrance on duty. Successful applicants who do not have an FSI-tested S-2/R-2(0) or above in an AID-useful language will be assigned to language training following AID/W OJT to achieve an S-2/R-2(0) proficiency.

5J. Evaluation

1. IDIP performance during AID/W OJT is rated by supervisors using the IDIP Performance Evaluation Report (see Attachment 5A) or by memorandum if the assignment is less than two months. Overseas OJT is rated using the Employee Evaluation Report (Foreign Service), form AID 420-4. Evaluation during foreign language training will be in accordance with HB 28, Ch. 4. Memoranda will contain an assessment of the IDI's performance during the assignment and potential to complete the remainder prepared and processed as outlined in HB 25, Ch. 10.

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2. Following successful completion of the IDIP, evaluations will be prepared and processed as outlined in HB 25, Ch. 10.

5K. Evaluation by the IDIP Review Panel

Upon completion of the AID/W training period, the IDIP Review Panel reviews each participant's file and recommends to the Director, Office of Personnel Management, transfer overseas for completion of training, extension of AID/W training for up to six months or separation under Section 611 of the Act. For career Foreign Service members in the IDIP on an excursion basis, recommendation to return to their former occupational category will be made in lieu of separation.

- o Recommendation for transfer overseas to complete training will be based on highly successful completion of the AID/W portion of the training program.
- o Extension of AID/W training for up to six months will be made in cases where it has been documented that improved skills and/or work exposure are necessary.
- o Separation under Section 611 of the Act will be made when evaluations indicate that the participant is unlikely to successfully meet the requirements of the IDIP, including interpersonal and managerial effectiveness. The IDIP Review Panel in this case must provide written justification to the Director, M/PM, for the separation recommendation.

5L. IDIP Graduation Panel

1. Upon completion of one year of overseas OJT, the IDIP Graduation Panel will review the participant's performance file and make recommendations to the Director, Office of Personnel Management, as follows:

a. For participants Class 5 and below: graduation and a promotion based on sustained outstanding performance or meritorious step increase (MSI) based on sustained superior performance; or counselling letter for satisfactory performance indicating those areas needing improvement; or separation under Section 611 of the Act when the file indicates that performance has been less than satisfactory.

b. For participants Class 4 and above: graduation and an MSI for sustained outstanding performance or cash award for sustained superior performance; or counselling letter for satisfactory performance indicating those areas needing improvement; or separation under Section 611 of the Act when the file indicates that performance is less than satisfactory.

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2. Recommendations for separation must be accompanied by a written justification. Recommendations for MSIs or cash awards will be made to the appropriate Fund Manager.

3. For FS members serving on an excursion assignment from another occupational category, only graduation or nongraduation will be considered by the IDIP Graduation Panel. Award recommendations, e.g., promotion, MSI or cash awards, will be made by the Foreign Service Selection Boards or Fund Managers as appropriate.

5M. Assignment After Training

Upon certification of completion of the IDIP, participants normally will be assigned to the vacant position identified upon their assignment to post or to another projected vacancy at their field mission. Should no 5M vacancy exist, the participants will complete their tour while assigned to the IDIP subcomplement and be assigned to another mission upon completion of home leave. In the latter case, participants will express onward assignment preferences and be considered as outlined in HB 25, Ch. 6 and Supplement 6A.

5N. Tenuring

Consideration for conversion of a career candidate to career status will be based on the provisions of HB 25, Ch. 5, and recommendations of a Tenure Board. Policies and procedures governing the establishment and responsibilities of the Foreign Service Tenure Board are covered in HB 25, Ch. 5, Supplement 5C.

50. Payment of Expenses

1. The travel of participants and dependents to Washington and shipment of household effects while training are centrally funded by M/PM. Upon completion of AID/W training, the overseas posts to which the participants are assigned assume financial responsibilities for support.

2. Expenses for training courses and seminars and travel within the U.S. as required for such training must be approved by the TRC. Training costs will be charged to M/PM/TD funds; travel costs will be charged to M/PM/ADM.

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5P. Ceiling Allocation

1. For the duration of the training program, participants will be charged to M/PM's ceiling allocation and will be assigned to the IDIP subcomplement (AID/W and Overseas) of the Foreign Service Complements.

2. Upon successful completion of the program, participants will be charged to the employment ceiling of the field mission to which they are assigned or in the case where no onward assignment exists, they will remain on the IDIP subcomplement until completion of their tour.

ANALYSIS OF POSITION REQUIREMENTS

PART I - TO BE COMPLETED BY SER/PM/PO

POSITION TITLE	POSITION DESCRIPTION NO.
FUNCTIONAL TITLE	ORGANIZATIONAL ABBREVIATION
TYPE POSITION (AID/W ONLY)	
<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> MANAGERIAL

PART II - TO BE COMPLETED BY SUPERVISOR

(Please TYPE. Submit all copies to SER/PM/PO. After review, one copy will be returned to you.)

BELOW IS A LIST OF BASIC MANAGERIAL KNOWLEDGE AND ABILITIES COMMON TO MOST EXECUTIVE AND MANAGERIAL POSITIONS. AS THE SUPERVISOR RESPONSIBLE FOR THE POSITION IDENTIFIED ABOVE, INDICATE THE DEGREE TO WHICH EACH SKILL, KNOWLEDGE, OR ABILITY LISTED IS RELEVANT TO THE POSITION BY INSERTING THE MOST APPROPRIATE NUMBER FROM THE FOLLOWING SCALE IN EACH BOX.

1 = ESSENTIAL 2 = VERY USEFUL 3 = DESIRABLE 4 = OPTIONAL

SECTION A - ENVIRONMENTAL KNOWLEDGE

1. EXTERNAL ENVIRONMENT OF THE PROGRAM

- SOCIAL, POLITICAL AND ECONOMIC FORCES (DOMESTIC & INTERNATIONAL) AFFECTING THE PROGRAM.
- GOVERNMENTAL POLICIES, ORGANIZATIONS, MISSIONS AND OPERATIONS.
- PUBLIC POLICIES RELEVANT TO THE PROGRAM.

2. INTERNAL ORGANIZATIONAL ENVIRONMENT OF THE PROGRAM.

- INTERNAL ORGANIZATION OF AID.
- GOALS AND OPERATIONS OF AID.
- COMMUNICATION AND COORDINATION WITH OTHER MEMBERS OF AID MANAGEMENT TEAM.
- INTERESTS AND CONCERNS OF EMPLOYEES, UNIONS AND OTHER SPECIAL INTEREST GROUPS (E.G., WAO).

SECTION B - MANAGEMENT KNOWLEDGE

1. FEDERAL ADMINISTRATIVE PROCESSES

- FEDERAL PERSONNEL SYSTEM, INCLUDING LABOR-MANAGEMENT RELATIONS AND EEO.
- FEDERAL BUDGETING SYSTEM.
- FEDERAL CONTRACT AND PROCUREMENT SYSTEM.

2. PROGRAM PLANNING - ABILITY TO:

- FORMULATE PROGRAM GOALS AND OBJECTIVES.
- DEVELOP EFFECTIVE, EFFICIENT AND ECONOMICAL ORGANIZATIONAL STRUCTURES.

3. PROGRAM IMPLEMENTATION - ABILITY TO:

- RECOGNIZE AND ANALYZE PROBLEMS.
- IDENTIFY AND SELECT FROM ALTERNATIVE COURSES OF ACTION.
- ANTICIPATE POTENTIAL PROBLEMS AND DEVISE CONTINGENCY PLANS.
- MAKE EFFECTIVE DECISIONS AND SOLVE PROBLEMS.
- DEVELOP AND TRAIN SUBORDINATES.
- DELEGATE AUTHORITY.

4. ABILITY TO UTILIZE MANAGERIAL SYSTEMS AND PROCESSES, SUCH AS:

- FINANCIAL MANAGEMENT.
- INFORMATION MANAGEMENT.
- DATA PROCESSING.
- PERSONNEL AND MANPOWER MANAGEMENT.

5. PROGRAM CONTROL AND EVALUATION – ABILITY TO:

- CONTROL PROGRAM ACTIVITIES.
- DEVELOP ALTERNATIVE PLANS FOR PROGRAM IMPROVEMENT.
- EVALUATE PROGRESS TOWARD OBJECTIVES.

SECTION C – INTERPERSONAL ABILITIES

ABILITY TO:

- INSPIRE CONFIDENCE IN SELF AND IN THE PROGRAM.
- WORK WITH PEOPLE OF VARIOUS BACKGROUNDS – SOCIAL, ECONOMIC, RACIAL, ETC.
- LISTEN TO AND ACCEPT THE VIEWS OF OTHERS.
- SECURE UNDERSTANDING AND SUPPORT FROM HIGHER LEVEL MANAGEMENT.
- COMMUNICATE WITH SUBORDINATES AND DEAL WITH THEIR INDIVIDUAL AND COLLECTIVE REPRESENTATIVES.
- ACCEPT RESPONSIBILITY.
- REPRESENT THE ORGANIZATION TO OTHER ORGANIZATIONS WITHIN THE AGENCY, OTHER AGENCIES, THE LEGISLATIVE BRANCH, AND TO THE PUBLIC.

SECTION D – PERSONAL ABILITIES

ABILITY TO:

- COMMUNICATE EFFECTIVELY ORALLY AND IN WRITING.
- NEGOTIATE.
- CONCEPTUALIZE AND ANALYZE.
- USE OWN TIME EFFECTIVELY.
- BE AWARE OF OWN CAPABILITIES AND LIMITATIONS.

SECTION E – ADDITIONAL MANAGERIAL KNOWLEDGE OR ABILITY REQUIREMENTS OF THIS POSITION

PLEASE SPECIFY ANY ADDITIONAL REQUIREMENTS

-
-
-
-

TYPED NAME OF SUPERVISOR	SIGNATURE OF SUPERVISOR	DATE
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PART III – REVIEWED BY CHIEF, SER/PM/PO

TYPED NAME	SIGNATURE	DATE
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INDIVIDUAL DEVELOPMENT PLAN (IDP)

INSTRUCTIONS: See reverse for Privacy Act Statement

PART A - TO BE COMPLETED BY SER/PM/PO

1. NAME OF EMPLOYEE (Last, First, Middle Initial)		2. GRADE	3. SSAN	4. DATE ASSIGNED TO POSITION
3. POSITION TITLE				
POSITION NO.	DEPT. ABBREV.	TYPE POSITION (AID/W ONLY)		
		<input type="checkbox"/> EXECUTIVE <input type="checkbox"/> MANAGERIAL		

PART B - TO BE COMPLETED BY INCUMBENT AND SUPERVISOR

(Please TYPE. Submit all copies to SER/PM/PO. After approval, one copy will be returned to you.)

AFTER CAREFUL REVIEW OF THE ANALYSIS OF POSITION REQUIREMENTS, FORM AID 460-2, INCUMBENT AND SUPERVISOR DETERMINE JOINTLY WHETHER ANY SKILLS/KNOWLEDGE/ABILITIES SHOWN AS REQUIRED IN THE "ANALYSIS" NEED DEVELOPMENT. IF REQUIRED, LIST IN ITEM 1.A. AND COMPLETE ITEMS 2.A.-2.C., AS APPROPRIATE. IF NO DEVELOPMENTAL ACTIVITY IS REQUIRED, COMPLETE ITEM 1.B. COMPLETE ITEMS 3. AND 4.

1. A. SKILLS/KNOWLEDGE/ABILITIES REQUIRING DEVELOPMENT

B. NO DEVELOPMENTAL ACTIVITY NEEDED.

2. DEVELOPMENT ACTIVITIES NEEDED TO MEET REQUIREMENTS LISTED IN ITEM 1.A. ABOVE. (Continue under Remarks, if necessary.)

A. DEVELOPMENTAL ASSIGNMENTS (Details to positions in different occupational areas):

B. FORMAL TRAINING WITH SUGGESTED AVAILABILITY DATES (Seminars, Workshops, Conferences, Briefings, Etc.):

C. SELF-DEVELOPMENT ACTIVITIES (Professional Association Activities, Readings, Etc.):

3. TYPED NAME AND SIGNATURE OF INCUMBENT	DATE	4. TYPED NAME AND SIGNATURE OF SUPERVISOR	DATE
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REMARKS

PART C - TO BE COMPLETED WITHIN SER/PM, AS INDICATED

1. REVIEWED BY PM/PO	DATE	2. REVIEWED BY PM/MD	DATE	3. APPROVED BY EXECUTIVE MANPOWER MGT. OFFICER	DATE
TYPED NAME AND SIGNATURE		TYPED NAME AND SIGNATURE		TYPED NAME AND SIGNATURE	

PRIVACY ACT STATEMENT FOR

FORM AID 460-3, Individual Development Plan (IDP)

The following statement is required to appear on the subject form by the Privacy Act of 1974 (Public Law 93-579; 88 Statute 1896.)

This form is used to identify skills, knowledge, or abilities to be acquired to achieve maximum effectiveness in a given position and contains a schedule of developmental experiences including work assignments, formal training, and self-development activities to meet the incumbent's needs related to essential optimum performance in a given position. The Foreign Assistance Act of 1961, as amended; the Foreign Service Act of 1946, amended Title 5; and Executive Order 10561, September 13, 1954, constitute authority for collecting this information.

Disclosure of information provided will not be made outside the Agency without the written consent of the employee concerned except (a) pursuant to any applicable routine use listed under AID's Orientation and Training Records System, AID-13 in AID's Notice of Systems of Records for implementing the Privacy Act as published in the Federal Register, or (b) when disclosure without the employee's consent is authorized by the Privacy Act and provided for in AID Regulation 15. (A copy of the Regulation and Notice of Systems of Records is available from AID Distribution on request.)

You will note that your social security number has been entered on this form. The U.S. Civil Service Commission has supplied the following information regarding disclosure of social security account numbers under Public Law 93-579, Section 7(b):

Disclosure by you of your social security number (SSN) is mandatory to obtain the services, benefits or processes that you are seeking. Solicitation of the SSN by the United States Civil Service Commission is authorized under provisions of Executive Order 9397, dated November 22, 1943. The SSN is used as an identifier throughout your Federal career from the time of application through retirement. It will be used primarily to identify your records that you file with the Civil Service Commission and other Federal agencies in connection with lawful requests for information about you from your former employers, educational institutions, and financial or other organizations. The information gathered through the use of the number will be used only as necessary in personnel administration processes carried out in accordance with established notices of systems of records. The SSN also will be used for the selection of persons to be included in statistical studies of personnel management matter. The use of the SSN is made necessary because of the large number of present and former employees and applicants who have identical names and birth dates, and whose identities can only be distinguished by the SSN.

Raymond Jacobson
Executive Director

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CHAPTER 6

EXECUTIVE DEVELOPMENT PROGRAM

6A. Purpose

1. This Chapter sets forth policies, procedures, and responsibilities for the implementation of an Executive Development Program designed to foster executive and management development as an integral part of AID's personnel management operations.
2. Guidance for Government-wide executive and management development activities was provided by the Civil Service Commission in Federal Personnel Manual Letter 412-2 dated January 29, 1974. Its main thrust is to assure that agencies have a sufficient number of qualified people to meet their present and future needs for executive leadership. The objective of the program is to insure maximum effectiveness in managerial positions. AID's Executive Development Program generally follows the guidelines provided in FPM 412-2. In planning the Agency's Program, however, the Executive Manpower Resources Board made the decision to divide the target population in AID/W into two categories: "Executives" filling top level managerial positions, and "Managers" assigned to managerial positions at the next level of responsibility.
3. By virtue of the level involved, "Managers" are provided with the opportunity to develop their managerial skills and ultimately move into top level executive positions.

6B. Definitions

For the purposes of this Chapter, the following definitions are applicable:

1. Executive Manpower Resources Board (EMRB)

a. The EMRB is an executive board which monitors executive development efforts and reviews progress of the Executive Development Program on behalf of the Administrator. The Assistant Administrator for Program and Management Services (AA/SER) serves as Chairman. EMRB members are the Assistant Administrators or their Deputies for each Bureau, the Directors of Personnel and Manpower (SER/PM), Financial Management (SER/FM), and Equal Opportunity. Bureau participation in Board meetings is not delegated below the level of Deputy Assistant Administrator.

b. The Chief of the Manpower Development Division (SER/PM/MD) serves as the EMRB Executive Secretary.

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2. Executive Manpower Management Officer (EMMO)

The Director of Personnel and Manpower (SER/PM) is designated as EMMO.

3. Executive Positions

As determined by the EMRB, positions in AID/W at the level of: (a) Office Deputy Director and higher; (b) Chiefs of Bureau Executive Management Staffs; (c) any other supervisory positions directly reporting to an Assistant Administrator, Deputy Assistant Administrator, or higher level officer.

4. Managerial Positions

As determined by the EMRB, positions in AID/W at the level of Division Deputy Chief, Division Chief, and Assistant Director, as well as Deputy Chiefs of Bureau Executive Management Staffs.

5. Executive

An "Executive" is the individual assigned to an executive position in AID/W.

6. Manager

A "Manager" is the individual assigned to a managerial position in AID/W.

7. Incumbent

An individual assigned to a position included in the Executive Development Program.

8. Supervisor

The official to whom the incumbent reports.

9. Analysis of Position Requirements (Form AID 460-2) (Attachment A)

A list of basic managerial knowledge, skills, and abilities common to most identified positions which provides the Supervisor with a scale for estimating the extent to which each listed skill, ability, or knowledge is required for optimum performance. Form AID 460-2 is hereafter referred to as "Analysis."

10. Individual Development Plan (IDP) (Form AID 460-3) (Attachment B)

The IDP is a plan jointly developed by Supervisor and incumbent which:
(a) identifies skills, knowledge, or abilities to be acquired or

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sharpened to achieve maximum effectiveness in a given position and (b) contains a schedule of developmental experiences including work assignments, formal training, and self-development activities to meet the incumbent's needs related to essential requirements reflected in the Analysis.

6C. Applicability

1. This Chapter applies to all positions in AID/W defined under 6B3 and 6B4.
2. This Chapter also applies to 9 to 11 Missions, to be identified prior to implementation of any of the other provisions of this Chapter. Implementation in Missions is to be accomplished by applying the provisions of this Chapter to all positions occupied by FSR-1, 2, or 3 level officers (excluding Mission Directors) in the designated Missions.
3. Twelve to 18 months after implementation, the provisions of this Chapter are to be reviewed in light of operational experience and appropriate modifications will be initiated (e.g., possible modification of the coverage of this program both in the field and AID/W).

6D. Responsibilities

1. Assistant Administrator for Program and Management Services (AA/SER)

AA/SER is responsible for ensuring that executive development programs are consistent with AID's manpower goal and objectives.

2. EMRB

The EMRB, chaired by the AA/SER, is responsible for the direction and planning of the Executive Development Program, determining the positions covered under the program and monitoring and reviewing its implementation. The EMRB also selects trainees for a variety of developmental training programs.

3. EMMO

The EMMO approves individual development plans and amendments.

4. Office of Personnel and Manpower (SER/PM)

SER/PM assumes overall operational responsibility, coordination, and administration of the executive development program, reviews and recommends action on proposed training activities and developmental assignments, and evaluates and follows up on program effectiveness and accomplishments.

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5. Supervisors

Supervisors complete the Analysis of Position Requirements within 45 days of this issuance for each position included in this program. Analysis is also prepared and submitted with the position description for any new position in this program.

6. Supervisors and Incumbents

a. Supervisors and incumbents review the Analysis of Position Requirements and complete the Individual Development Plan (IDP) within 45 days after the assignment of an incumbent to any position included in this program.

b. Review periodically and at least annually the status and progress of developmental activities and consider possible modifications if deemed necessary.

6E. Developmental/Training Activities

Agreed upon developmental/training activities reflected in the IDP are ideally completed within 1 year except in unusual circumstances where necessary resources and/or facilities for such training are not immediately available. In the event the planned developmental program is not completed, the incumbent and the supervisor review the IDP to determine whether those outstanding activities are still relevant after 1 year of operation. If still valid, new dates are established and the IDP adjusted accordingly. If the incompleting training activities are no longer relevant, the reasons are indicated on the old IDP and a new developmental plan is devised, if appropriate.

6F. Continued Participation in the Executive Development Program

After completion of all planned developmental/training activities, the incumbent may continue in the program upon agreement with the Supervisor that there is a need for additional developmental activities. In this case, the incumbent and Supervisor complete a new IDP.

6G. For related information on Executive Development through interchange of executives between the Government and the private sector, see Executive Order No. 11451, January 19, 1969 (34 F.R. 921).

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CHAPTER 7
AFTER - HOURS STUDIES

7A. Policy

- * 1. AID encourages its employees to continue the development of skills, knowledges, and abilities in order to further their career development within and beyond their present position. *
- * * 2. Courses related to future job possibilities will be considered if:
(a) related to employee's current office responsibilities. For example, an employee, regardless of current position title, who is assigned to an office responsible for contract management may apply for courses in contracting, procurement, negotiations, or other related courses;
(b) an office has identified a target position for an employee and has incorporated into that position specific training needs; or (c) the course will be of future benefit to the employee and AID.
- 3. For all courses, employees must provide sufficient justification and may include supervisory comments, if pertinent, as to how the employee, as well as AID, will benefit. * *

7B. Factors for Selection

- 1. AID will approve for Agency sponsorship applications for each semester/quarter for courses that are directly job related and self-development courses that are related to fields that meet AID's needs. Priority will be given to applicants for job-related courses. Factors to be considered for selection will include:
 - a. The degree of employees' need for training.
 - b. The potential of employees for advancement.
 - c. The extent to which employees' knowledge, skill, attitudes, or performance are likely to be improved by training.
 - d. The ability of employees to pass the training on to others upon return to the job.
 - e. The length of time, and degree to which, AID expects to benefit from the employees' improved knowledge, skill, attitudes, and performance.

* Revised

* * New Material

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f. Training opportunities previously afforded employees by AID.

g. The employees' own interest in and efforts to improve their work.

2. Full-time employees may take up to six after-hour courses over a one year period and part-time employees may take up to three after-hour courses over a one year period. (Two courses or less per semester subject to the availability of funds.)

7C. Course Announcement

AID will announce four times a year (Fall, Winter, Spring, and Summer) those categories of courses for which employees may apply, along with a deadline date for making application.

7D. General Limitation

1. Employees are required to pay or reimburse AID for any costs the Agency may have incurred on their behalf if they:

a. Withdraw after enrollment for reasons other than those listed below:

- (1) Unanticipated TDY - with supporting document.
- (2) Prolonged illness - with supporting document.
- (3) Unanticipated overseas assignment - with supporting documents.

b. Substitute a course without the written approval of OPT/PS&CD. (In case of emergency, an employee may receive approval by phone to substitute a course. When this occurs, the employee must submit to OPT/PS&CD, within 3 working days, a new Optional Form 170 (10 part) reflecting the change.) OPT/PS&CD will acknowledge the change in writing.

c. Fail to complete the course with a passing grade.

d. Fail to submit a copy of their grade to OPT/PS&CD within 2 months after completion of the course. Unofficial grades will not be acceptable.

2. Failure to comply with the above, will result in a copy of the application sent to the Office of Financial Management (FM) for collection. Until such time as full repayment of funds have been made, the employee will be restricted from further after-hours study. (OPT/PS&CD will advise the employee in writing prior to any submission for collection to FM.)

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3. Employees will be required to sign a reimbursement agreement at the time they request after-hours training. (See Attachment 7A.)

4. If circumstances warrant waiver of repayment of funds, provisions as stated herein, a request for such waiver may be submitted by the employee, together with supporting evidence, to the Director, OPT, through the Chief, OPT/PS&CD.

5. AID will not sponsor a course for audit purposes. A course must be taken for credit.

7E. Payment of Expenses

Payments are limited to registration fees, course tuition, and required textbooks. The required textbook fee is limited to \$20 per course. Any additional cost is paid by the employee. The Agency will not be responsible for late registration fees, general school supplies, or suggested reading materials.

ATTACHMENT 7A

REIMBURSABLE AGREEMENT FOR AFTER-HOURS TRAINING

I understand that I will be required to pay or reimburse AID for any costs the Agency may have incurred on my behalf if I:

- a. Withdraw after enrollment for reasons other than those listed below --
 - 1. Unanticipated TDY - with supporting document
 - 2. Prolonged illness - with supporting document
 - 3. Unanticipated overseas assignment - with supporting document
- b. Substitute a course without the written approval of OPT/PS&CD. (In case of emergency, an employee may receive approval by phone to substitute a course. When this occurs, the employee must submit to OPT/PS&CD, within three working days, a new Optional Form 170 (10 part) reflecting the change.) OPT/PS&CD will acknowledge the change in writing.
- c. Fail to complete the course with a passing grade.
- d. Fail to submit a copy of my grade to OPT/PS&CD within two months after completion of the course. Unofficial grade will not be acceptable.

Failure to comply with the above, will result in a copy of the application sent to the Office of Financial Management (FM) for collection. Until such time as full repayment of funds have been made, the employee will be restricted from further after-hours study. (OPT/PS&CD will advise the employee in writing prior to any submission for collection to FM.)

I have read and agree to comply with the above provisions.

Signature

Date

Office symbol, room number, and building

Telephone number

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CHAPTER 8

SUPERVISORY TRAINING PROGRAMS

8A. Purpose

This program (or compendium of programs) complies with the Civil Service Commission requirements for training supervisory personnel. It gives special emphasis to training employees who are or will be assigned to first-level supervisory positions or who have the potential to assume the duties of those positions. This training is available to both Civil Service and Foreign Service personnel of AID.

8B. General

1. The success of AID operations depends largely on the quality of its supervisors. Therefore, it is essential to prepare employees for their new and critical roles as supervisors. This program assists supervisors to meet the objectives of their organizations and to carry out their duties to the satisfaction of management, subordinate employees, and themselves.
2. The Civil Service Merit Promotion Program, implemented in AID as described in Chapter 16 of Handbook 25, establishes criteria for selecting employees with supervisory abilities or potential and requires training of all first-line supervisors. Appendix A, Supervisory Training, to FPM Chapter 410 establishes criteria for the training of supervisors upon which the programs provided for herein are based.
3. Employees who aspire to supervisory positions should demonstrate, by initiative, attitude, and performance, that they possess the capability to assume supervisory duties. In addition to possible formal training programs sponsored by AID, employees are encouraged to pursue self-development opportunities.

8C. Program Requirements

1. Programs for training supervisors are provided by SER/PM to meet the needs of the Agency and its employees. The programs reflect the Agency's mission, philosophy, tradition, and organization structure, and include information on its operations, goals, and problems. The training also includes information on theories of supervision and management, human relations, personnel policies and practices, performance appraisal, on-the-job training techniques and work planning, as well as the basic issues involved in merit promotion, equal opportunity, and labor relation policies and programs.

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2. Employees in the program must complete it satisfactorily to meet Civil Service Commission requirements and therefore must attend all classes for credit purposes. Absences require the prior approval of SER/PM/MD and the scheduling of make-up training sessions.

3. Supervision places employees in a new and different role in relation to management and other employees. To assure an early understanding of their responsibilities requires:

a. A minimum of 80 hours of training within the first 2 years as a supervisor.

b. The completion of at least 40 hours prior to or within 6 months of assuming their new duties. When the training cannot be provided before their assumption of new duties, SER/PM/MD prepares a training plan before they enter on their new jobs.

c. When the trainee's special background warrants it, SER/PM/MD may approve less than 80 hours of training.

8D. Responsibilities

1. Supervisors

a. Support training programs for their subordinate supervisory personnel through demonstrating positive interest in the program and making employees available for scheduled training sessions.

b. Recommend to SER/PM/MD those employees who demonstrate the capability or potential to assume supervisory duties.

c. Evaluate the performance of and identify the training needs of employees.

d. Encourage employees to participate in self-development programs.

e. Request SER/PM/MD approval of less than 80 hours training for new first-level supervisors with special backgrounds that warrant it.

2. Employees

Employees seeking supervisory positions have the responsibility to pursue self-development training opportunities. They should furnish information on these activities to SER/PM for inclusion in their official personnel folders (SF 171 is recommended for this purpose).

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3. SER/PM

- a. Identifies vacant and occupied positions which involve supervisory duties, particularly at the first level.
 - b. Insures that those selected for supervisory positions are provided the necessary training.
 - c. Develops, establishes, and makes necessary arrangements for supervisory training programs for AID personnel.
 - d. Schedules training courses and notifies supervisors and employees of the time, place, and other details of the course.
 - e. Counsels employees about self-development programs, assists in evaluating outside training activities, and provides AID facilities and materials.
 - f. Reviews its programs and makes changes to improve and update them.
 - g. Furnishes evidence of successful completion of the training for the employee's official personnel folder and for inclusion in the Revised Automated Manpower and Personnel System (RAMPS).
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CHAPTER 9

LONG-TERM TRAINING

9A. Purpose

This chapter describes long-term training (LTT) programs to provide qualified employees with state-of-the-art knowledge in their respective occupational fields or to learn, develop or improve skills required in current or future A.I.D. programs. The training programs also expose employees to new trends, research and other experts.

9B. Applicability

This chapter applies to Senior Foreign Service (SFS) and Senior Executive Service (SES) and A.I.D. U.S. direct-hire employees FS-04 and GS/GM-11 and above.

9C. Authorities and References

1. 5 USC 41
2. Foreign Service Act of 1980, as amended

9D. Definitions

1. Long-Term Training. Fulltime training for more than 120 calendar days in a Federal or non-Federal facility.
2. Senior training. Fulltime study for SFS and SES employees for up to 12 months.
3. Academic studies. Fulltime study for employees FS-04 and GS/GM-11 and above for four to 12 months.
4. Academic Studies Committee. Reviews training applications and makes recommendations to the Executive Management Resources Board. The committee is composed of representatives from Executive Management Staff offices; the Office of Equal Opportunity Programs; the Office of Personnel Management; and technical representatives, as appropriate. Technical representatives are included for their expertise but do not have a vote.

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5. Executive Management Resources Board. Reviews ASC recommendations for LTT, and makes final recommendations to the Administrator. The board represents bureaus and offices; the Office of Equal Opportunity and the Office of Personnel Management, as appropriate.

9E. Policies

1. Selection and assignment of employees to LTT will be made without regard to race, sex, color, age, religion, national origin, handicapping conditions, marital status or political affiliation.

2. Selection and assignment of employees to LTT will be based on one or more of the following objectives of staff development:

a. to develop technical and managerial skills of employees who have demonstrated above-average performance and prospects for early advancement to senior management positions;

b. to meet urgent Agency needs for specific skills;

c. to provide senior training for individual professional growth of senior executives at the policymaking level.

3. The Agency will pay tuition, registration and mandatory fees for LTT; LTT trainees will pay for study-related expenses (books, typing services and supplies) not covered by tuition.

4. The Agency will pay for refresher training when the receiving training facility requires the employee attend such as a prerequisite to the regular academic coursework.

5. LTT trainees not approved for refresher training at A.I.D. expense who pursue such training at their own expense and with their supervisors' approval will remain in official pay status.

6. LTT trainees will not receive regular performance evaluations (EER or PAR, as appropriate) for the training period.

7. LTT trainees will earn annual and sick leave as usual and are subject to A.I.D. attendance and leave regulations (see HB 27, Attendance and Leave).

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8. LTT trainees who stay at their training sites during a semester break are in duty status. Except for study-related travel, trainees will be placed on annual leave when they leave their training sites.

9. LTT is not a reason to request restoration of forfeited leave (see HB 27, Attendance and Leave).

10. GS/GM employees will remain on the rolls of the respective bureau/-office during their LTT assignment. The bureau/office will receive a temporary ceiling during the employee's training period.

11. FS employees will be placed on the training complement during their LTT assignments.

12. LTT trainees who fail to provide training documentation as required by M/PM/TD within 60 calendar days of completion of LTT assignment will be denied future A.I.D.-sponsored training opportunities.

13. The Agency will, wherever possible, place employees who have successfully completed LTT programs, in a continuing position that uses the employees' enhanced or newly acquired skills or abilities.

9F. Responsibilities

1. The Administrator, A/A.I.D.

Reviews list of LTT finalists rank-ordered by EMRB and makes final selection.

2. Assistant to the Administrator for Management (AA/M)

Serves as Chair, EMRB.

3. Director, Office of Personnel Management (M/PM/OD)

a. Administers the training program.

b. Approves extensions of training.

c. Serves as Chair, ASC.

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4. Academic Studies Committee (ASC)

Reviews and rank-orders LTT applicants and sends list to EMRB.

5. Executive Management Resources Board (EMRB)

a. Reviews ASC list, selects and rank-orders finalists and sends list to the Administrator.

b. Encourages qualified employees to apply for LTT.

6. Project Manager (M/PM/TD)

a. Develops, implements and manages the LTT program.

b. Issues the Agency's annual LTT program announcement.

c. Prepares LTT selection documentation (application book; appropriate recommendations/commentary; summary profile of applicant's experience and academic background and other supporting material) and distributes to the ASC.

d. Arranges and schedules ASC and EMRB meetings.

e. Notifies applicants regarding status of their applications and of the Administrator's final decision.

f. Selects site for LTT assignments based on ASC, EMRB or the Administrator's recommendations and in consultation with career counselors and appropriate sector council representatives.

g. Sends program evaluation and other documentation to LTT trainees for trainees to complete at the end of their respective training programs.

h. Sends copies of training documentation to trainee's Official Personnel Files.

7. A.I.D./W and Overseas Senior Management Officers

a. Consult with EMS officers, technical offices, sector councils and employees to identify potential LTT trainees.

b. Encourage qualified employees to apply for LTT.

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8. Career Development Officers

- a. Counsel employees on appropriateness of LTT in career planning.
- b. Review LTT applications and sit on Academic Studies Committee.

9. Employees

- a. Apply to the A.I.D.-designated training institution, providing records, transcripts and other materials required for acceptance.
- b. Include in the LTT application, specific request for approval of any academic program that will exceed 10 months.
- c. Provide project manager, M/PM/TD, with an academic course list and grades after registering for and completing each quarter/semester and grading period. Course selection must be in accordance with the trainee's original LTT application and M/PM/TD-approved training plan.
- d. Send training documentation, such as academic transcripts and evaluations completed by the employee and university faculty, to project manager within 60 calendar days of completion of the LTT assignment.
- e. Maintain personal time and attendance, sign timekeeper block and forward the timecard to the appropriate office in time to be processed.
- f. Contact M/PM/TD to use self-study facilities.
- g. Use excess annual leave prior to long-term training (see E8).

10. Timekeepers

Time and attendance reports for FS employees will be maintained by their respective personnel backstop officers; for GS employees, by their current bureau/office timekeeper.

- a. For FS employees, M/PM/FSP or M/PM/EPM provides supervisor's signature on timecards.
- b. For GS employees, bureau/office provides supervisor's signature on timecards.

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9G. Procedures

1. Training Announcement

The annual announcement lists in-house training as well as specialized programs, such as the Foreign Service Institute's 26-week Foreign Service Economic and Commercial Studies Program and the U.S. Office of Personnel Management's LEGIS Program.

2. Length of Study

a. Most academic LTT assignments will average four to 10 months, depending on the institution's calendar. An academic training request may specify a designated program of study requiring 10-12 months, such as the 12-month Massachusetts Institute of Technology's Sloan Program. Longer programs must be requested by the employee at the time of application.

b. Subsequent requests for extension of study beyond the program length initially approved by the Administrator must be submitted to M/PM/TD by March 1 to be considered.

c. Extensions in the mutual interest of the Agency and the employee may be granted by the Director, M/PM.

d. Normally, an extension will be granted in conjunction with leave without pay.

e. Requests for continuation of salary must be justified by a clear and compelling demonstration of how additional training would benefit the Agency.

3. Application

a. Applicants must have served in A.I.D. at least five years in a non-training status at the time of prospective assignment to the long-term training program and must be able to serve three times the length of the training assignment upon completion of the training.

b. Applicants must submit a completed Form A.I.D. 420-8, Long-Term Training Application, to the Project Manager, M/PM/TD, no later than the close of business of the deadline date. Applications received after the deadline date will be returned, not processed, to employees.

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4. Selection Process and Criteria

a. M/PM/TD reviews applications and sends copies to sponsoring bureaus/offices.

b. Bureaus/offices review applications of employees assigned to their bureau/office and rank-order them based on bureau/office and Agency priority needs.

c. ASC convenes and rank-orders applicants and sends list to the EMRB. The following factors are considered by the ASC and the EMRB:

o relevance of the training to current or projected assignment;

o degree to which an applicant satisfies the criteria of Agency objectives for training (see E2);

o the estimated value of a LTT assignment to an applicant's career development in relation to the employee's work experience, performance level and career potential;

o estimated capacity of the employee to successfully complete an appropriate LTT assignment, based on an evaluation of his/her recent and current performance in A.I.D.;

o timing of the proposed LTT assignment in regard to the employee's current tour of duty;

o considerations of equal opportunity and affirmative action in selecting LTT applicants.

d. The EMRB rank-orders applicants and sends a recommended list of finalists to the Administrator.

e. Employees selected for LTT, as well as employees not selected, immediately will be notified by M/PM/TD.

Attachments:

- A. Long-Term Training Evaluation Report
- B. Long-Term Training Questionnaire
- C. Long-Term Training Application

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Attachment 9A

LONG-TERM TRAINING EVALUATION REPORT

Student's name _____ Grade _____

Name/location of academic institution _____

Inclusive dates of this report, from _____ to _____

Specialization _____

The following information is to be completed by the professor or faculty advisor who has overall knowledge of student.

Full name/title of evaluator _____

Note: The following standards should be applied in evaluating student's qualities or factors in terms of graduate levels of attainment.

- (A) Superior in most important areas
- (B) Very Good
- (C) Satisfactory
- (D) Marginal in some important respects
- (E) Unsatisfactory

PERFORMANCE IN STUDY PROGRAM

Circle Rating Letter	Qualities or Factors	Check if NOT Observed
A B C D E	(1) Diligence in applying him/herself to studies	
A B C D E	(2) Level of comprehension of substance of courses(s)*	
A B C D E	(3) Analytical ability and keenness of perception	
A B C D E	(4) Effectiveness of oral expression	
A B C D E	(5) Effectiveness of written expression	
A B C D E	(6) Thoroughness and accuracy of work	

*If one course activity is particularly strong or weak please comment in remarks section.

Narrative Remarks:

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EVALUATION OF PAPERS PREPARED (if applicable)

Circle Rating					Qualities or Factors	Check if NOT Observed
A	B	C	D	E		
A	B	C	D	E	(1) Competence displayed in discerning issues and analyzing the pertinent facts	
A	B	C	D	E	(2) Accuracy of acquired facts	
A	B	C	D	E	(3) Competence displayed in drawing valid conclusions	
A	B	C	D	E	(4) Competence displayed in utilizing available research material	
A	B	C	D	E	(5) Relative effectiveness of paper as related to papers submitted by other graduate students	
A	B	C	D	E	(6) Precision and effectiveness in drafting	

Narrative remarks:

PERSONAL QUALITIES

The Agency would appreciate receiving your comments on any of the following personal qualities you have had an opportunity to observe. Where not observed, please indicate.

1. Student's personal relations with members of the group and instructors including ability to work as a member of a "team."

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11. Was your assignment following training planned and discussed with you in sufficient time to permit appropriate course selections at least during the latter part of training? Discuss.

12. Please list the courses you took, your grades and the names of your professors. Attach transcript if possible.

13. Degree attained (if appropriate) _____

14. Current assignment _____

(title)

_____ (grade)

_____ (Office/Mission)

15. Recommendations/comments:

M/PM/TD:6/87

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Attachment 9C

LONG-TERM TRAINING: GUIDELINES FOR COMPLETING APPLICATION

Items numbered below refer to corresponding boxes or spaces on the A.I.D. Long-Term Training Application Form (A.I.D. 420-8).

Note: Throughout the form, applicants and endorsers may use the two continuation sheets if needed for complete answers. All answers must be contained in the form together with the two continuation sheets.

Remember: Concrete, focused answers are the most convincing.

Items 1-5: Self-explanatory

Item 6: Give official job title. Functional description of duties follows under item 9.

Items 7-8: Self-explanatory.

Item 9: Indicate where your position fits in the organizational structure and briefly describe your main functions and responsibilities. Example: "Applicant is the chief of the Agricultural Development Office at A.I.D./ABC, one of six Office Chiefs who report to the Deputy Mission Director. She supervises a staff of 2 USDH, 2 FNDH professionals, 2 FNDH clerical and 2 long-term USPSC employees. Ms. Adams' office is responsible for the overall planning and direction of 00 programs and 00 projects worth \$00 million. Under her guidance, it provides technical advice and assistance to the A.I.D. Mission. Her professional in-country contacts are routinely at the minister level."

Item 10: Self-explanatory.

Item 11: Include all non-degree related training (with date, sponsor and place) that demonstrates career interest in/or preparation for the training requested in Item 12. Do not overlook A.I.D.-sponsored courses.

Item 12: Applicant's statement should be organized giving:

- a. overall objectives of the proposed course of study;
- b. descriptions of specific, realistic course topics that might fulfill the training objectives.
- c. proposed starting and ending dates of training;
- d. (optional) names of suggested institutions, departments or graduate centers where applicant could accomplish the training objectives;
- e. (optional) applicant's preferred training site, justified.

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Note: Applicant's training site suggestions and preferences will be noted and drawn on if feasible but are not binding on the Agency. A.I.D. reserves the right to select a different training site.

Item 13: Chronological listing of previous experience should include all positions held for six months or more since complete of secondary schools, undergraduate or graduate studies. If title/grade inaccurately depicts duties or levels of responsibility, two-line descriptions may be added to such entries under "agency and geographic location."

Item 14: The response should be organized to address:

- a. Applicant's ultimate career goals in the Agency;
- b. Applicant's desired type of position following completion of LTT. How would that type of assignment build toward ultimate career objectives?
- c. How would specific coursework proposed under the LTT program prepare applicant for that next type of assignment?
- d. Ways in which this training meets A.I.D.'s organization workforce development needs in its high-priority areas of activity.

Item 15: This section is to be completed by Missions Directors for overseas employees or by the ranking officer at the next-lower level to AAs or independent office chiefs for A.I.D./W employees. Please complete in consultation with the applicant's first- or second-line supervisor, as appropriate.

The response should address:

a. Relevance of LTT to applicant's work performance. Explain how the skills or specific knowledge from the proposed coursework will enhance the applicant's subsequent performance. Draw on your knowledge or the employee's performance and capabilities.

b. Agency staff development needs. How does the LTT assignment relate to A.I.D.'s high-priority areas of activity? Identify or describe the type of onward assignment that your bureau/office might recommend for this employee at the end of LTT.

c. Applicant's career growth. How will the training assignment accommodate or promote the applicant's longer-term growth in his/her career field? What are his/her career goals in A.I.D.?

Item 16: This section is to be completed by the appropriate Assistant Administrator or Head of independent office. After reviewing the lower-level endorsement and application, indicate the strength of your endorsement specifying any reservations or suggested amendments concerning the applicant or the program of study.

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14. Applicant's statement (see guidelines for completing application).

Applicant's signature _____ Date _____

15. Statement of Mission Director of A.I.D./W Office Head (see guidelines for completing application).

Signature _____ Date _____
 Typed name _____ Title _____

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16. Statement of Assistant Administrator or A.I.D./W Office Head (see guidelines for completing application).

Signature _____ Date _____

Typed name _____ Title _____

17. Additional sheet

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17. Additional sheet continued

LONG-TERM TRAINING APPLICATION

DATE OF APPLICATION

INSTRUCTIONS TO APPLICANT: To complete this form, please type. This form will be used by the selection committees in considering candidates for long-term training. ALL requests MUST be forwarded to PM/TD for consideration by the selection committees, whether endorsed or not. The statement printed on the reverse of page 4 is required by the Privacy Act of 1974 (Public Law 93-579; 88 Statute 1896). Read and sign in the space provided indicating that the statement has been read.

1. NAME (Last, First, Middle) _____ 2. AGE _____ 3. SOCIAL SECURITY NUMBER _____

4. MAILING ADDRESS _____

6. PRESENT POSITION _____ 7. GRADE _____ 8. OFFICE/MISSION _____

5. YEARS IN FEDERAL GOVERNMENT
AID _____ OTHER _____ TOTAL YEARS _____

9. DESCRIPTION OF PRESENT DUTIES _____

10. EDUCATION BEYOND HIGH SCHOOL

DEGREE	YEAR	MAJOR(S)	INSTITUTION

11. OTHER TRAINING (indicate if U.S. Government-sponsored)

12. TRAINING REQUESTED (include as much information as possible, including facility preferred and alternate preference for training, if any)

14. Applicant's statement (see guidelines for completing application).

Applicant's signature _____ Date _____

15. Statement of Mission Director of A.I.D./W Office Head (see guidelines for completing application).

Signature _____ Date _____

Typed name _____ Title _____

16. Statement of Assistant Administrator or A.I.D./W Office Head (see guidelines for completing application).

Signature _____ Date _____
Typed name _____ Title _____

17. Additional sheet

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CHAPTER 10

EMERGENCY HEALTH/ACCIDENT INSURANCE COVERAGE - FOREIGN SERVICE NATIONAL AND THIRD COUNTRY NATIONAL EMPLOYEES

10A. Purpose

This chapter contains the policies, procedures and responsibilities regarding the provision and administration of emergency health and accident insurance coverage for Foreign Service National (FSN) and Third Country National (TCN) employees.

10B. Applicability

This chapter applies to all Agency FSN and TCN employees, including those employed under personal service contracts, who are in the United States for official training, consultation or temporary duty (TDY) purposes.

10C. Authorities and References

1. Foreign Assistance Act of 1961, as amended, sec. 635 (e)
2. Foreign Affairs Manual, Vol. 3, Ch. 900, Foreign Service National Employees, Consular Agents, and Special Categories
3. Interagency Handbook on Foreign Service National Personnel Administration

10D. Definitions

1. United States. For purposes of this chapter, includes the 48 contiguous states, Hawaii, Alaska, Puerto Rico and U.S. territories.
2. Other AID/W Offices. Any AID/W office or bureau coordinating with an overseas post on training, consultation or TDY activities in the United States for an FSN or TCN employee.

10E. Policies

1. Coverage will go into effect no sooner than three days before travel, will continue while the employee is in training, or on consultation or TDY, through return travel, not to exceed three days from the date of departure.

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2. Coverage will not be provided beyond the period of official training, consultation or temporary duty.
3. Coverage will not be extended to employees in the United States under invitational travel orders or under any other authorization except as provided for in section 7B.
4. Coverage will not be extended to employees traveling locally or in third countries.
5. The Agency will not pay the deductible required by the emergency health and accident insurance policy or costs incurred by an employee for medical services or treatment not covered by the insurance policy.
6. The Agency will not be responsible for collecting disallowed amounts or any other payments related to the insurance policy.
7. The Agency will not fund coverage for dependents accompanying an employee to the United States.

10F. Responsibilities

1. AID/W Operating Expense Branch (FM/A/OE)

Funds premiums for emergency health and accident insurance coverage for employees.

2. Management Services Branch (MS/OP/W/MS)

Contracts with a U.S. private insurance carrier to provide emergency health and accident insurance coverage for employees.

3. Training Division (PM/TD)

- a. Administers the insurance policy.
- b. Enrolls employees with the insurance carrier at least 30 days before travel commences.
- c. Authorizes FM/A/OE to pay the insurance premium.
- d. Forwards insurance carrier's billings for premiums to FM/CMP/DC for payment.

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f. Advises employees on official business in the United States who need medical services or treatment on how to file a claim.

g. Provides claim form(s) and identification cards to employees who require medical treatment.

h. Forwards claims to the insurance carrier and follows up as necessary.

4. Other AID/W Offices

Reminds the overseas post when an employee of that post plans to leave for the United States, to notify PM/TD of the employee's date of departure and arrival in the United States, and to provide the information necessary to enroll the employee under the insurance policy.

5. Executive Officer, Overseas Post

a. Advises employees of the terms, conditions and exclusions of the insurance policy, and of their responsibilities.

b. Considers other arrangements or alternatives to provide for emergency health and accident protection when coverage is not provided by the AID/W policy.

c. Notifies PM/TD at least 35 days in advance of the date an employee begins travel to the United States for training, consultation or TDY, and requests the employee be enrolled under the insurance policy.

d. Encourages employee to have a medical examination before departure for the United States.

6. Employee

a. Voluntarily takes a medical examination prior to departure for the United States to establish the fact that no pre-existing medical conditions exists in the event a medical claim is disputed.

b. Upon arrival in AID/Washington, contacts PM/TD to obtain literature and information related to insurance coverage.

c. Contacts PM/TD prior to regular treatment for necessary guidance and forms to file an insurance claim. In the case of emergency, contacts PM/TD as soon as possible following treatment.

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d. Checks with the Department of State, Office of Medical Services (M/MED) to obtain names of local physicians in case medical attention is required.

e. Pays the deductible fee required by the insurance policy, and for costs of medical services or treatment not covered by the insurance policy, as well as for the cost of any extended coverage he/she has made personal arrangements for with the carrier, e.g., to provide coverage for any time beyond the official purpose of his/her travel to the United States.

f. Completes and returns claim forms to PM/TD, making certain the physician has completed the appropriate part.

g. Pays disallowed amounts even though he/she has returned to post.

10G. Procedures

1. Enrollment

The insurance carrier must have a minimum 30-days advance notice to enroll an employee under the policy.

a. At least 35 days in advance of anticipated travel to the United States, the overseas post requests PM/TD, via cable or fax, to enroll an employee under the policy. Post provides employee's full name, date of birth, duration of stay in the United States, name of training course and dates, and training site if other than Washington, DC.

b. If the overseas post is unable to meet the 30-day deadline, it may submit a written request for a waiver. The request must be accompanied by a justification for the delayed notification. Waivers are not automatically approved; waivers are granted at the discretion of the carrier.

c. PM/TD submits employee's name to the carrier.

2. Processing Claims

a. Employee requests guidance and forms to make a claim from PM/TD.

b. Upon completion of treatment, employee returns completed forms to PM/TD.

c. PM/TD checks forms to make certain they are complete and forwards to carrier.

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CHAPTER 11

THE CAREER ADVANCEMENT PROGRAM (CAP)

11A. Purpose

This chapter provides the policies, regulations and procedures governing the Career Advancement Program (CAP). The CAP is designed to identify current AID employees who possess the potential to succeed in professional Foreign Service occupations.

11B. Applicability

The AID Career Advancement Program is designed to provide current AID employees opportunities to join and advance in the Foreign Service. Program entrance is limited to those employees who have at least one year of AID experience and who are qualified in meeting FS-06 and FS-07 entrance criteria.

11C. Authorities and References

1. Foreign Service Act of 1980, as amended
2. HB 25, Ch. 35, "Foreign Service Appointments"
3. HB 28, Ch. 4, "Foreign Language Program"
4. HB 29, Ch. 5, "AID Awards Program"

11D. Definitions

1. Career Advancement Program (CAP). A program that identifies potential career FS employees within the Agency and provides training in a wide range of specialty areas. The program may take up to three years to complete, including AID/Washington and overseas assignments, plus language training.

2. CAP Screening Committee. A committee convened by the Director, PM/RS, whose members include a non-voting representative of the Office of Equal Opportunity Programs (EOP), PM/FSP/CD members and other appointees made by the Director, PM/R. Committee members review an applicant's file to determine if the applicant meets the eligibility requirements and the qualification standards for the CAP and entrance level criteria (i.e. FS-06 and/or FS-07) for the foreign service. They review CAP applicant's technical qualifications, interview applicants and recommend to The Director, PM/FSP applicants eligible for CAP selection.

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3. CAP Pre-Departure Review Panel. A panel convened by the Director, FSP, to review CAP employee's Performance Evaluation File (PEF) and determine if they have successfully completed the required AID/W training and are ready for overseas assignment. The panel consists of the following members: the Director, FSP; the appropriate CDO; the Director of the parent office for the occupational category being reviewed; and/or the Director of the Technical Office in the Regional Bureau where the employee is assigned. The EOP representative will serve as a nonvoting member.

4. CAP Training Plan. A training plan will be prepared by PM/FSP/CD for each CAP employee, at the beginning of their Washington training. The plan establishes the objectives, length and composition of training based on the selected employee's background, experience and the targeted occupational category.

5. CAP Graduation Panel. A panel convened by the Director, Office of Personnel Management (PM/OD), to review the files of CAP employees who have completed one year of training overseas to determine if they have successfully completed the required training necessary for graduation. The panel consists of the Director, PM/OD, the Director, PM/FSP, the appropriate CDO; the representative of the parent office for the occupational category being reviewed; and/or a representative of the Technical Office in the Regional Bureau where the employee is assigned. The EOP representative will serve as a nonvoting member.

11E. Policies

1. The CAP program may not be used to recruit specialists for whom the Agency has short-term needs.

2. Contingent upon the availability of FTE, participants in the CAP will be carried on the Personnel Management (PM) complement while in AID/W, then charged to the CAP participating mission upon arrival at post. The participating mission will be provided with a FTE ceiling and OE to accommodate the CAP employee for the first year of training at post. Missions will then be expected to pick up the position ceiling and FTE costs for the CAP employee after the successful completion of the employee's training program.

3. Employees will be appointed at the FS-06 and FS-07 levels, dependent upon grade eligibility criteria.

4. Consistent with Agency needs, qualified employees selected for the CAP will be trained in specific occupational categories and will receive both on-the-job and formal training in Washington and overseas. Training in Washington may last up to two years. Overseas on-the-job training will require one additional year, for a total of up to three years in the CAP.

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5. All CAP employees must have an FSI tested S2/R2 proficiency in an AID useful language prior to being posted overseas. No deferrals will be permitted.

6. All CAP employees converting to the Foreign Service from Civil Service are appointed as career candidates on their date of entry to the program, and will have five years from the date of entry as FS career candidates to satisfy the requirements for tenure. CAP employees with CS reemployment rights may revert to the CS at their former grade at any time prior to tenure.

7. Foreign Service members selected for participation in CAP will continue under the conditions of their ongoing appointments, with the addition of the standard tenure language proficiency requirement.

8. Appointment for CAP employees as Career Candidate Foreign Service Officers is governed by the regulations contained in HB 25, Supp. 35A. Once candidates are selected, and medical and security clearances are received, Civil Service applicants will be offered the opportunity to convert to a Foreign Service appointment.

9. An employee appointed under authority of the FSA of 1980 is entitled to reinstatement to his/her former position, or a comparable position unless terminated for misconduct or delinquency.

11F. Responsibilities

1. Director, Office of Personnel Management (PM/OD)

The Director, PM, is responsible for the overall management of AID's Career Advancement Program, and performs the following specific functions:

a. Determines the number of CAP employees and occupational composition for each fiscal year.

b. Reviews selections for the CAP to ensure compliance with affirmative action and Agency employment and programmatic goals.

c. Approves promotions, MSI's and cash awards.

2. Deputy Director, Office of Personnel Management (PM/OD)

a. Convenes the CAP Graduation Panel after overseas training, and approves/disapproves panel recommendations.

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- b. Serves as CAP Graduation Panel Chairperson.
- 3. Chief, Foreign Service Personnel Division (PM/FSP)
 - a. Approves and disseminates information about the program.
 - b. Makes final selections for the CAP from among the most qualified applicants recommended by the CAP Screening Committee.
 - c. Serves as Chairperson of the CAP Pre-departure Review Panel to determine each employee's readiness for the overseas portion of the training.
 - d. Serves as a member of the CAP Graduation Panel.
 - e. Provides opportunities to employees to apply for the program.
- 4. Chief, Career Development Branch (PM/FSP/CD)

The Chief, PFM/PM/FSP/CD, is responsible for the management of the CAP, and through the appropriate CDOs is responsible for the following specific CAP activities:

- a. Develops information on the CAP.
- b. Recommends to the Director, PM/FSP, in consultation with the appropriate geographic bureau, the initial overseas assignment of a CAP employee.
- c. Provides career and performance counseling. Monitors individual CAP participant performance and overall results of the CAP program.
- d. Assists supervisors and employees in developing individual Washington training plans.
- e. Monitors training programs to ensure compliance with CAP program requirements and objectives.
- f. Ensures that evaluations for all phases of a CAP training program are prepared and placed in the CAP employees PEF.
- g. Serves as liaison with the post of assignment, advising the post of employees progress in meeting the Washington training objectives.
- h. Serves as a member of the CAP Screening Committee and of the appropriate CAP Pre-departure Review and Graduation Panels.

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5. Chief, Recruitment Division (PM/RS)

a. Maintains records of all applications. Screens applications for minimum requirements and forwards eligible employees to CAP Screening Committee.

b. Convenes and acts as Chairperson of the CAP Screening Committee for selections. Forwards CAP selection recommendations to Director, PM/FSP for final approval.

c. Determines appropriate linkage for CS employees converting to the FS pay scale.

d. Initiates and follows up on requests for medical and security clearances.

6. Training Division (PM/TD)

a. Coordinates in-house classroom training.

b. Approves/disapproves, in collaboration with PFM/PM/FSP/CD, all CAP training requests.

7. Director, Overseas Post of Assignment

a. Designs and submits to PM/FSP/CD the CAP employee's specific training plan. The training plan should be in collaboration and agreement with the appropriate CDO.

b. Prepares and submits to PM/FSP/CD the required performance evaluations.

c. Provides performance counseling in coordination with the CDO.

8. Office of Equal Opportunity Programs (EOP)

a. Advises PFM/FSP/CD on affirmative action and equal employment opportunity matters related to selection, training, assignment, evaluation and retention of minorities and women.

b. Serves as a nonvoting member on the CAP Screening Committee, CAP Review Panel and the Graduation Panel.

9. CAP Employee

a. Participates with CDO and supervisor in developing, submitting and achieving the objectives of his/her training plan in a thorough, substantial and timely manner.

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b. Provides information on training activities to help his/her supervisor evaluate his/her performance within prescribed deadlines.

11G. Procedures

1. Application

a. Applicants for the CAP must submit to PM/RS a:

(1) Standard Form 171, Application for Federal Employment;

(2) Narrative statement describing the basis for interest in the Foreign Service and highlighting skills which would indicate probability for a successful Foreign Service career. Applicants must also certify that they are available for worldwide assignment.

b. The Chief, PM/RS, or designee, maintains a file for each applicant which contains submitted documents and forms.

c. The applicant's file is reviewed by PM/RS staff and appropriate members of the CAP Screening Committee to determine if the applicant meets the eligibility requirements and the qualification standards for the CAP. If the applicant does not meet the qualifications, the Chief, PM/RS, so notifies the applicant. If the applicant does meet the qualifications, the file is further reviewed by the CAP Screening Committee.

2. Selection

a. After the initial screening in PM/RS, the CAP Screening Committee reviews applicants' technical qualifications and establishes a rank-order list of the most highly qualified for interviews. Interviews are then held to assess the applicant's competence to perform the work of a Foreign Service Officer, potential for growth in AID's Foreign Service, and appropriateness to serve abroad as a representative of the United States.

b. Based on the interviews and background documentation, the CAP Screening Committee identifies and submits a rank ordered list of the most highly qualified applicants to the Director, PM/FSP for final selection decisions.

c. All selectees must have a current medical and security clearance prior to participation in the CAP.

d. The Director, PM/FSP, issues a letter to selected candidates establishing the date of entry into the program, the conditions of Foreign Service employment, and any other relevant data deemed necessary for satisfactory completion of the training program.

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3. Grade Determination

a. CAP selectees are appointed to Foreign Service classes based on the below criteria. Grade determinations are made by the Chief, PFM/PM/R.

<u>Grade</u>	<u>Criteria</u>
7/1	All candidates, except those meeting the higher qualifications for grade FS-06 and above; B.A. degree with at least one year of AID experience.
6/1	B.A. degree with three years of relevant experience, one of which must have been with AID; M.A. degree with one year of AID experience.

b. All salary offers and grade determinations are final.

11H. Training

Training consists of new-entry training, off-site academic training, Agency classroom instruction (short training courses appropriate to occupational category, including technical, managerial and supervisory skills), on-the-job training (OJT) and language training, as determined necessary by PM/FSP/CD.

1. AID/W Training:

a. CAP employee's who do not have a Foreign Service Institute-tested S2/R2 or above in a foreign language will be assigned to language training during Washington training to achieve a minimum of S2/R2 proficiency, required for tenure; or, in the case of a CAP employee assigned to a language designated post, the level of proficiency required by the overseas assignment.

b. CAP employees are assigned to AID/W bureaus or offices to receive technical training appropriate to their occupational category.

c. The length and type of training is determined by the CDO and supervisor and indicated in the training plan, which may be modified. The plan is included in the CAP employee's PEF.

d. As early as possible, the CDO in collaboration with the appropriate bureau or office identifies the post to which the CAP employee will be assigned for overseas training.

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11H1

e. When the CAP employee completes Washington training, the CAP Pre-Departure Review Panel reviews his/her PEF and may recommend to the Director, PM/FSP:

(1) for FS-07 employees - promotion and transfer overseas to complete training;

(2) for FS-06 employees - transfer overseas to complete training;

(3) extension of Washington training for up to six months based on documentation that improved skills and/or work exposure are necessary for a successful overseas training experience;

(4) separation from the program if evaluations indicate the employee is unlikely, even with further training, to meet program requirements. Recommendation for separation requires written justification.

2. Overseas Training:

a. Upon successful completion of Washington training, the CAP employee is assigned to a post where an ongoing assignment, which may include an additional year of training, has been identified.

b. The post supervisor submits a training plan to the CDO. This training plan will be reviewed for appropriateness to the individual CAP employee's needs, modified as necessary, and approved by the CDO.

111. Assignment

1. The following criteria is used by the CDO to determine whether a post is appropriate to provide CAP employee training:

a. a broad, representative post portfolio;

b. post interest in and support for a CAP employee's overseas training;

c. presence at post of a senior officer in the CAP employee's targeted backstop who is committed to and cable of providing the necessary training;

d. a dedicated position in the employee's backstop at an appropriate level for a CAP employee to assume at the end of overseas training.

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2. Upon graduation, a CAP employee will be assigned to the position identified upon his/her assignment to post.

11J. Evaluation

General

1. CAP employees are formally evaluated twice a year, including a review prior to departing for post and when they have completed one year at post. Mid-year evaluations may be a brief narrative on the employee's performance.

During Washington training, a CAP employee is evaluated by on-the-job training assignment supervisors using Form AID 460-7, IDI Performance Evaluation Report. After a CAP employee goes overseas, Form AID 420-4, Employee Evaluation Report - Foreign Service EER is used, and the CAP employee is subject to the same requirements of the FS evaluation program as all other FS employees, except that the CAP employee's EER is reviewed by the CAP Graduation Panel rather than the annual FS Selection Boards.

2. FS-07 CAP employees are considered for two promotions during the program (one prior to departure of assignment overseas and one at graduation), and FS-06 CAP employees are considered for one promotion during the course of the program (at graduation).

3. In Washington

a. Form AID 460-7 is used by the on-the-job training supervisor to evaluate CAP employees who have been in a specific on-the-job training assignment for more than two months; for training of less than two months, the evaluation is by memorandum, signed by the supervisor and the CAP employee. Both evaluation memos and IDI Performance Evaluation Reports should include an assessment of the CAP employee's potential to complete the program and advance in the FS.

b. To be approved for departure for post by the CAP Pre-Departure Review Panel, a CAP employee must meet the objectives of his/her AID/W training plan and demonstrate the performance characteristics, skills and abilities required for a successful overseas training experience.

4. Overseas Post

a. An interim EER is required prior to graduation unless graduation occurs within 30 days of the required EER submission date.

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11J4

b. To be graduated (certified as having successfully completed overseas training), a CAP employee must demonstrate sustained positive performance in meeting the objectives of his/her training plan, and should demonstrate an interpersonal and managerial effectiveness and potential for growth that indicates he/she has the potential for a successful career in AID.

11K. CAP Graduation

1. Upon receipt of the EER covering the complete overseas training period, the CAP Graduation Panel will be convened to review the employee's PEF and recommend to the Director, PM/OD:

a. graduation and/or promotion based on sustained successful performance during the CAP;

b. graduation and/or a Meritorious Step Increase (MSI) based on sustained successful performance during the CAP, or a cash award when a CAP employee is not eligible for a step increase;

c. graduation;

d. a counselling letter for less competitive performance indicating areas that need improvement;

e. or separation from program when performance is less than satisfactory.

11L. Awards

1. Cash awards are funded by a separate fund managed by PM/OD.

2. CAP employee's may be nominated for Special Act cash awards, as appropriate.

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17. Additional sheet continued

PRIVACY ACT STATEMENT

The information requested is necessary for and prerequisite to consideration of your application for training. The Foreign Assistance Act of 1961, as amended, constitutes authority for requesting this information. Disclosure of the information provided will not be made outside the Agency without your written consent except, if required, to (a) educational or other institution(s) providing training for qualifications evaluation and program planning purposes; (b) pursuant to any other applicable routine use listed under AID's Orientation and Training Records System, AID-13, in AID's Notice of Systems of Records for implementing the Privacy Act as published in the Federal Register; or (c) when disclosure without the employee's consent is authorized by the Privacy Act and provided for in AID Regulation 15. (A copy of the Regulation is available from AID Distribution on request.)

The following statement, supplied by the Office of Personnel Management regarding requests for social security numbers under Public Law 93-579, Section 7(b) pertains in this instance:

Disclosure by you of your social security number (SSN) is mandatory to obtain the services, benefits or processes that you are seeking. Solicitation of the SSN by the Office of Personnel Management is authorized under provisions of Executive Order 9397, dated November 22, 1943. The SSN is used as an identifier throughout your Federal career from the time of application through retirement. It will be used primarily to identify your records that you file with the Office of Personnel Management or other agencies. The SSN also will be used by the Office of Personnel Management and other Federal agencies in connection with lawful requests for information about you from your former employers, educational institutions, and financial or other organizations. The information gathered through the use of the number will be used only as necessary in personnel administration processes carried out in accordance with established regulations and published notices of systems of records. The SSN also will be used for the selection of persons to be included in statistical studies of personnel management matter. The use of the SSN is made necessary because of the large number of present and former employees and applicants who have identical names and birth dates, and whose identities can only be distinguished by the SSN.

I have read the above statement.

Signature

Date

SPECIAL CASES

Although the majority of the location citations follow the pattern described previously, there are these exceptions:

- o In some of the Handbooks, a majority of the text is reprinted from the Foreign Affairs Manual (FAM). All FAM citations are marked by a '#' sign before the section number.
- o A major portion of Handbook 14 is composed of the Federal Acquisition Regulation (FAR). All citations to this publication are cited as 14:FAR(section number).
- o Three Handbook supplements that are basically separate volumes are cited as, 1B: (Procurement Policy), 3A: and 3B: (Project Managers Guidebook).
- o In Handbooks which contain both Parts as well as Chapters, the Roman numeral Part number is separated from the Arabic Chapter number by a dash (-). For example: 21:I-2A8, a citation to Chapter 2 of Part I of Handbook 21.

CROSS REFERENCES

These references provide direction for selection of index terms:-

A 'see' reference points from an unused term to the one that is used.

'x' is the reverse of see (do not bother to look) and provides a guide to terms that are not used in the index.

'see also' points to terms that are closely related.

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