Department of Energy
Washington, DC 20585

AUG 02 2006

MEMORANDUM FOR: DISTRIBUTION

FROM: GEORGE MALOSH
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OFFICE OF SCIENCE

SUBJECT: Annual Performance Plans and Assessment Reports

This letter provides direction and guidance for Annual Performance Plans and Assessment Reports for FY2007. As the Office of Science (SC) continues to institutionalize its overall management approach for performance and accountability, these two documents form a key component of how SC communicates performance expectations and assesses performance, while establishing a clear basis of self-assessment and continuous improvement.

The following is provided as guidance in the development of these documents. Care has been taken this year to provide guidance and tools that will ease the production effort, while meeting our line management responsibilities. With the release of SC's Oversight Program Description, SC will begin compiling a three-year Integrated Assessment Schedule and accordingly you will see a template to begin collecting information in a more uniform manner, setting the stage for more comprehensive resource planning in the future. I have asked SC-CH and OR to work together to establish a web-based tool to house the assessment information so that SC Managers here and in the field can readily access this data by site/function and also by function across all sites.

Other changes from last year's guidance are as follows:

- This process is extended to the Integrated Support Center (ISC) and HQ elements reporting directly to the COO;
- Increased use of web links to reference and/or collect supporting materials;
- Establishment of the three-year Assessment Plan for each Laboratory site;
- Elimination of overview/vision materials; and
- Common templates are provided to allow multi-site data collection for this office (You may still elect to include additional materials/references if it benefits your organization).

The objectives of the Annual Performance Plan are as follows:

- Establish clear performance expectations for each organization;
- Communicate organizational goals to employees to provide linkages to individual performance plans;
- Identify resource needs, including staffing, travel, support contractor, and training; and
- Create a basis for evaluating performance, self assessment, and continuous improvement.

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