Performance Evaluation System (PES)
Significant Changes

Focused evaluation date
(Fiscal year based vs. anniversary date based)
What Happens Next?

• 2012
  – Business as usual
  – Transition document satisfies requirements for 7/1/12

• 2013
  – Supervisors have 90 days (July 1-Sept. 30) to:
    • conduct evaluations for the 7/1/12 – 6/30/12 performance year
    • plan for the next performance year (7/1/13 – 6/30/14)
    • Both of these actions can be addressed on the new PES form
Significant Changes

• Planning sessions *shall be* conducted during the first 3 months following:
  – the appointment of a new employee;
  – the permanent movement of an employee into a position having a different position number with significantly different duties;
  – the beginning of the new performance evaluation year
Significant Changes

• New ratings (no points or weights)
  – Exceptional
  – Successful
  – Needs Improvement / Unsuccessful
  – Not evaluated
  – Unrated (Avoid Act 477 violations!)

• Mandatory second level evaluator

• Bank of Expectations
# Performance Evaluation System – Planning & Evaluation Form

## Employee Information

- **Dept/Office/Section/Unit:**
- **Employee Name:**
- **Employee Title:**
- **Employee Personnel #:**
- **Performance Year:**
- **Evaluation Period:**

## Overall Evaluation:

- [ ] Exceptional
- [ ] Successful
- [ ] Needs Improvement/Unsuccessful
- [ ] Not Evaluated
- [ ] Unrated - If Unrated, select sub-category: [ ] Never Rendered [ ] Untimely [ ] Violation of Chapter 10

## Planning Session

- **Date the Planning Session was Conducted:**
- **Second Level Evaluator Signature:**
- **Personnel #:**
- **Date:**
- **Evaluating Supervisor Signature:**
- **Personnel #:**
- **Date:**
- **Employee Signature:**
- **Date:**

## Evaluation Session

- **Date the Evaluation Session was Conducted:**
- **Delivery:** [ ] Hand [ ] Mail
- **Second Level Evaluator Signature:**
- **Personnel #:**
- **Date:**
- **Evaluating Supervisor Signature:**
- **Personnel #:**
- **Date:**
- **Employee Signature:**

## Interim Discussions (optional)

- **Date:**
- **Employee/Supv Initials:**
- **Date:**
- **Employee/Supv Initials:**

- **Employee Statement:** [ ] I have received a copy of the evaluation and understand that failure to sign will not prohibit the evaluation from becoming official for the performance year.

## Human Resources Office Use Only

- **Date Planning Received in Human Resources:**
- **Human Resources Staff Initial:**
- **Date Evaluation Received in Human Resources:**
- **Human Resources Staff Initial:**
Agency Mission / Goals / Standards:

Department Mission / Goals:

Work and Behavior (at least one each):  

Documentation / Comments (attach supporting documentation):

Bank of Expectations
PES Resources

- Human Resource Management
- Online training via Civil Service website
  - Available through LEO
  - PES Supervisor: *Mandatory* Web-based training program
    - Launched May 2012 with an expected completion date of December 31, 2012
Questions?