**Performance Management Communication Timeline and Template**

|  | **Timeframe** | **From** | **To** | **Purpose** | **Message** | **Docs to Attach** |
| --- | --- | --- | --- | --- | --- | --- |
|  | May | HR Leader | Agency leaders and managers | Training opportunities | Human Resources will be conducting training sessions to discuss the importance of the Performance Management Process as well as expectations for managers. We will focus on responsibilities for the cycle ending June 30th as well as those for the new cycle which begins July 1st.  This is mandatory training for all managers. Please review the dates and times below and respond by XXX with your first and second choice for training.  Wednesday, May XX X:00 – X:00  Friday, May XX X:00 – X:00  Thursday, June XX X:00 – X:00  The training will cover Georgia’s Performance Management process and a review of (insert your agency name) specific agency requirements. Class size is limited to XX participants per session and space will be filled on a first come, first served basis.  In addition to these training sessions, resources and job aids to support the Performance Management process are available on the Performance Management website at <http://teamgeorgia.gov/performance/>.  If you have any questions or need assistance, please contact (insert your name and contact information.) |  |
|  | July | HR Leader | Managers | Evaluation process steps and timeline | Now that FYXX has ended, it is time to complete the year-end performance evaluations for your direct reports in ePerformance.  The first step in the process is to remind your direct reports of the deadline to complete their self-evaluation in ePerformance (deadline of XXX). Once they have completed their self-evaluation, you will receive an email notification from the ePerformance system. At this point, you should complete your evaluation of the employee using the employee’s input as well as the performance notes you’ve maintained throughout the year.  Once you have completed your evaluation and are satisfied with it, click on the “Submit for Approval” button in ePerformance to make the document available to your manager for approval. Be sure to notify your manager when you have completed this step. Once you’ve been notified that the document is approved by your manager and HR, you should click on the “Available for Review” button in ePeformance to make the evaluation available to the employee and schedule the performance discussion with your employee.  Several job aids are attached for your use. The first two provide step-by-step instructions on how to “complete” the employee evaluation process in ePerformance. The others provide some tips and techniques for avoiding rater errors in evaluations and for conducting effective performance discussions. Additional information and job aids to support the Performance Management process are available on the Performance Management website at <http://teamgeorgia.gov/performance/>.  Don’t forget: There are nine steps in completing the employee evaluation process in ePerformance:   1. Employee completes self-evaluation 2. Manager completes evaluation 3. Manager submit evaluation for approval 4. Manager’s manager approves evaluation 5. HR Administrator approves evaluation 6. Manager changes document status to “Available for Review” in ePerformance 7. Manager holds performance discussion with employee and changes document status in ePerformance to “Review Held” 8. Employee “Acknowledges” the review in ePerformance 9. Manager “Completes” the document in ePerformance sending it to history   All performance evaluations for your direct reports should be “complete” in ePerformance by XXX. If you have any questions or need assistance, please contact (insert your name and contact information.) | * Completing Employee Evaluation – Mgr Job Aid * Finalizing the Performance Evaluation – Mgr Job Aid * Rater Evaluation Errors * Conducting Effective Performance Feedback Sessions |
|  | July | HR Leader | Employees | Self-Evaluation process steps and timeline | Now that we have ended FYXX, your manager will soon be completing your performance evaluation for the past year. Before this happens you have the unique opportunity to complete your own self-assessment to ensure that your manager has a clear understanding of your work for the past year and how it has added value and impacted the business. This is a great chance to “toot your own horn!”  Two job aids are attached for your use. The first provides step-by-step instructions on how to complete your self-assessment in ePerformance using the Self Service functionality. The second job aid provides some tips for writing your self-assessment effectively. Additional information and job aids to support the Performance Management process are available on the Performance Management website at <http://teamgeorgia.gov/performance/>.  Self-assessments should be “complete” in ePerformance by XXX. After that date, your manager will complete his/her evaluation of your performance and will schedule a performance discussion with you.  If you have any questions or need assistance, please contact (insert your name and contact information.) | * Employee Evaluation Process – Employee Job Aid * Writing Your Self-Evaluation |
|  | July - August | HR Leader | Manager’s Manager | Approval Process for year-end evaluations | Reviewing Managers: Your participation in the year-end performance evaluation is key. Over the next few weeks, the managers in your organization will be submitting the year-end evaluations for their direct reports to you for approval.  It is important that you complete this process in a timely manner so the manager can conduct the performance discussion with the employee. It is also important that you complete this process with care.  As you approve the documents completed by your managers, review them carefully to ensure that they are objective, accurate and that appropriate supporting statements are given. You should also review the documents with an eye toward equity – making sure all your managers are holding their direct reports to the same level of performance.  A job aid which provides step-by-step instructions on how to approve documents ePerformance is attached for your use. Additional information and job aids to support the Performance Management process are on the Performance Management website at <http://teamgeorgia.gov/performance/>.  All performance evaluations for employees should be “complete” in ePerformance by XXX. Please make sure you complete your approval process to support that timeline. If you have any questions or need assistance, please contact (insert your name and contact information.) | * Mass Approval – Mgr Job Aid |
|  | June - July | HR Leader | Managers | Performance plan process steps and timeline **for agencies that use the cloning functionality** | It is time to create the Performance Plans for the July 1, 20XX – June 30, 20XX plan year. This year for the first time you have the opportunity to clone or copy an employee’s performance plan from a previous cycle or from another employee with similar responsibilities.  A job aid is attached to walk you through the cloning process. In addition, training sessions on this new functionality will be conducted:  Wednesday, July XX X:00 – X:00  Friday, July XX X:00 – X:00  Thursday, July XX X:00 – X:00  Please review the dates and time and respond by XXX with your first and second choice for training.  Managers have until XXX (approximately 3 weeks) to create performance plans for their direct reports using the cloning function. After this time, the standard performance plan template will be created for all remaining employees.  Regardless of whether you clone the performance plans for your direct reports or wait to have the standard performance plan template created for them, all plans for FYXX need to be in place and “completed” in ePerformance no later than XXX.  Some guidelines to keep in mind as you draft the performance plans for your employees include:   1. Ensure employee performance goals, if used, cascade from (Agency Name)’s strategic goals. 2. The employee’s major Job functions and responsibilities should serve as a general framework when writing their goals. 3. All goals need to be written at the “successful performer” level and should include a date by which the goal should be achieved. 4. Limit job responsibilities, if used, to those that are most critical to the job. It’s better to have 4-6 job responsibilities than a dozen.   Once you have drafted the performance plans for your direct reports, you will need to review them with your manager to ensure that they are aligned with and support agency/division priorities. When you have agreement on the goals/expectations for the year, be sure to click on “complete”.  This will finalize the document that will be used in the coaching and evaluation phases of the performance management process. It will also provide “view access” to the employee and your manager.  Note:  (include reminders about any agency specific directives regarding sections used, required goals, section weightings, etc.)  Three job aids are attached for your use. The two provide step-by-step instructions on how to clone performance plans and how to establish performance plans in ePerformance. The others provide some tips and worksheets for establishing SMART goals. Additional information and job aids to support the Performance Management process are available on the Performance Management website at <http://teamgeorgia.gov/performance/>.  If you have any questions or need assistance, please contact (insert your name and contact information.) | * Creating Cloned Documents – Mgr Job Aid * Creating Performance Plans – Mgr Job Aid * Setting and Achieving SMART Goals |
|  | July | HR Leader | Managers | Performance plan process steps and timeline **for agencies that don’t use the cloning functionality** | Performance Plans for the July 1, 20XX – June 30, 20XX plan year need to be in place and “completed” in ePerformance no later than XXX.  Some guidelines to keep in mind as you draft the performance plans for your employees include:   1. Ensure employee performance goals, if used, cascade from (Agency Name)’s strategic goals. 2. The employee’s major Job functions and responsibilities should serve as a general framework when writing their goals. 3. All goals need to be written at the “successful performer” level and should include a date by which the goal should be achieved. 4. Limit job responsibilities, if used, to those that are most critical to the job. It’s better to have 4-6 job responsibilities than a dozen.   Once you have drafted the performance plans for your direct reports, you will need to review them with your manager to ensure that they are aligned with and support agency/division priorities. When you have agreement on the goals/expectations for the year, be sure to click on “complete”.  This will finalize the document that will be used in the coaching and evaluation phases of the performance management process. It will also provide “view access” to the employee and your manager.  Note:  (include reminders about any agency specific directives regarding sections used, required goals, section weightings, etc.)  Two job aids are attached for your use. The first provides step-by-step instructions on how to establish performance plans in ePerformance. The others provide some tips and worksheets for establishing SMART goals. Additional information and job aids to support the Performance Management process are available on the Performance Management website at <http://teamgeorgia.gov/performance/>.  If you have any questions or need assistance, please contact (insert your name and contact information.) | * Creating Performance Plans – Mgr Job Aid * Setting and Achieving SMART Goals |
|  | August | HR Leader or Commissioner | Employees and Managers | Deadline reminder – year-end evaluations and performance plans | Performance management is a critical process for our agency.  It ensures that all our employees are working toward our overall agency goal of (insert your overall agency goal) and that they consistently receive feedback on their performance.  To ensure all of our employees have received this feedback, please complete the FYXX year end assessments on all your employees no later than XXX.  Performance plans for all employees for the XXX fiscal year should be completed no later than XXX.  When completing the year-end performance management process in ePerformance, be sure to follow the process through until the status screen for each employee shows “Completed” for all three steps.  cid:image001.png@01CC5D9D.AED205B0  If you have any questions regarding the performance management process, contact (insert your name and contact information.) |  |
|  | August - September | HR Leader or Commissioner | Managers | Accountability re: year-end evaluations | Based on our ePerformance reports, it appears that you have not yet completed the year-end evaluation of your direct reports for FYXX.  If you have, in fact, already finished the evaluation and had the feedback conversation with your direct reports, please go into ePerformance and “complete” their evaluations in the system.  If you have not yet done the performance evaluation for your direct reports, this needs to be completed by XXX. If you do not meet this deadline, (insert consequences: i.e., a Letter of Concern will be issued; your name will be given to the Commissioner as part of a status update, etc.)  Two job aids that provide step-by-step instructions on how to “Complete” the employee evaluation process in ePerformance are attached for your use.  If you have any questions or need assistance, please contact (insert your name and contact information.) | * Completing Employee Evaluation – Mgr Job Aid * Finalizing the Performance Evaluation – Mgr Job Aid |
|  | August - September | HR Leader or Commissioner | Managers | Accountability re: performance plans | Based on our ePerformance reports, it appears that you have not yet completed the performance plans for your direct reports for the XX fiscal year.  If you have, in fact, established the performance expectations in ePerformance and discussed them with your direct reports, please go into ePerformance and “complete” the plans in the system.  If you have not yet set up the performance expectations for your direct reports, this needs to be completed by XXX. If you do not meet this deadline, (insert consequences: i.e., a Letter of Concern will be issued; your name will be given to the Commissioner as part of a status update, etc.)  A job aid that provides step-by-step instructions on how to establish performance plans in ePerformance is attached for your use. (**For agencies that don’t use cloning)**  Two job aids are attached for your use. The two provide step-by-step instructions on how to clone performance plans and how to establish new performance plans in ePerformance. (**For agencies that use cloning)**  If you have any questions or need assistance, please contact (insert your name and contact information.) | * Creating Cloned Documents – Mgr Job Aid * Creating Performance Plans – Mgr Job Aid |
|  | October- May | HR Leader | Managers | Reminder: Ongoing coaching and feedback | Are you monitoring your employees’ performance on an ongoing basis? Doing so helps ensure employees are receiving constant feedback and coaching around their performance and will help avoid surprises at the end of the performance cycle. It will also ensure you have the information needed to accurately assess the employee’s performance at the end of the performance cycle.  A job aid with some tips for doing this is attached. Additional information and job aids to support the Performance Management process are available on the Performance Management website at <http://teamgeorgia.gov/performance/>.  If you have any questions or need assistance, please contact (insert your name and contact information.) | * Monitoring Performance |
|  | October- May | HR Leader | Managers | Reminder: Ongoing coaching and feedback | When was the last time you had a coaching session with your employees? Coaching occurs whenever you provide feedback to an employee for the purpose of improving performance. It can be used when an employee is meeting expectations. It can also be used when an employee is performing well but is capable of doing even more.  Coaching is important because it provides people with direction, guides them in how to master new skills, procedures, or tasks and helps them meet performance goals. Coaching is also a good investment of your time. Through effective coaching, you can free up your own time, improve your employee’s performance and enhance the productivity of your department.  A job aid which outlines some reasons for coaching and specific steps to take is attached. Additional information and job aids to support the Performance Management process are available on the Performance Management website at <http://teamgeorgia.gov/performance/>.  If you have any questions or need assistance, please contact (insert your name and contact information.) | * Coaching Performance |
|  | October- May | HR Leader | Managers | Reminder: Ongoing coaching and feedback | Are you providing your direct reports with ongoing feedback? When employees receive feedback on their performance, they are more likely to understand what is expected of them, to repeat successful performance, and to improve their work when necessary.  A job aid with some tips for providing effective feedback is attached. Additional information and job aids to support the Performance Management process are available on the Performance Management website at <http://teamgeorgia.gov/performance/>.  If you have any questions or need assistance, please contact (insert your name and contact information.) | * Conducting Effective Performance Feedback Sessions |
|  | December - January | HR Leader | Managers | Mid-year Review | As we are approaching the middle of FYXX, it is time to begin the mid-year evaluation process.  The mid-year review process is important as it provides a formal opportunity to give, receive, and document feedback while there is still time to make any necessary changes. It also provides a good opportunity to look at the performance expectations that were established at the beginning of the fiscal year to determine if they need to be updated based on current reality.  Mid-year evaluations and the accompanying discussions need to be complete for all your direct reports by XXX.  (Insert verbiage specific to how your agency does mid-year reviews, i.e., paper-based, in ePerformance, etc.).  Additional information and job aids to support the Performance Management process are available on the Performance Management website at <http://teamgeorgia.gov/performance/>. If you have any questions or need assistance, please contact (insert your name and contact information.) |  |