

Completing the Paper-Based Performance Management Form

The State of Georgia Performance Management Form is used to facilitate a consistent process enterprise-wide. The form consists of the Individual/Core Competencies, Individual Goals, Job Responsibilities and Individual Development Plan which can be tailored to each position within your agency. The instructions for each section are outlined below.

STATE OF GEORGIA PERFORMANCE MANAGEMENT FORM

PART 1

Employee Name:	Emp. ID #:	Job Title:
Manager Name:	Department:	
Review Period:	From:	TO:
What Sections will you be using in your evaluation?		
All sections (1, 2 and 3) <input type="button" value="v"/>		

PART 1: The manager will fill in employee and agency identifying information.

Managers using the Excel version of the form will need to identify which sections their agency is using by clicking the drop down menu.

PART 2

Score the performance in each job factor below on a scale of 5-1 or N as follows:	
5 = Exceptional Performer	Employee exceeded all performance expectations. Employee was an exceptional contributor to the success of his/her department and the State of Georgia. He/she demonstrated role model behaviors.
4 = Successful Performer-Plus	Employee met all and exceeded most (more than 50%) of the established performance expectations.
3 = Successful Performer	Employee met all performance expectations and may have exceeded some (less than 50%). Employee was a solid contributor to the success of his/her department and the State of Georgia
2 = Successful Performer – Minus	Employee met most (more than 50%), but failed to meet some performance expectations. Employee needs to further improve in one or more areas of expected job results or behavioral competencies.
1 = Unsatisfactory Performer	Employee did not meet all or most (more than 50%) of the established performance expectations. Employee needs significant improvement in critical areas of expected job results or behavioral competencies.
N = Not rated:	At the agency's discretion, a new hire or transfer within five months of the end of the performance period may or may not receive a performance rating.

PART 2: The 5-point rating scale is used to evaluate performance expectations. All employees will be evaluated using the 5-point rating scale.

PART 3

Section 1: Individual / Core Competencies (25% minimum of total score)		
Core Competencies (All Employees)	Comments	Rating
Customer Service - Understands that all employees have customers, internal and external, that they provide services and information to; honors all of the State's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable service.		
Teamwork and Cooperation - Cooperates with others to accomplish common goals; works with employees within and across his/her department to achieve shared goals; treats others with dignity and respect and maintains a friendly demeanor; values the contributions of others.		
Results Orientation - Consistently delivers required business results; sets and achieves achievable, yet aggressive, goals; consistently complies with quality standards and meets deadlines; maintains focus on Agency and State goals.		
Accountability - Accepts full responsibility for self and contribution as a team member; displays honesty and truthfulness; confronts problems quickly; displays a strong commitment to organizational success and inspires others to commit to goals; demonstrates a commitment to delivering on his/her public duty and presenting oneself as a credible representative of the Agency and State to maintain the public's trust.		
Judgment and Decision Making - Analyzes problems by evaluating available information and resources; develops effective, viable solutions to problems which can help drive the effectiveness of the department and/or State of Georgia.		

PART 3: The performance plan begins with Section 1: Individual/Core Competencies. This is a collaborative process with the manager and the employee. The Individual/Core Competencies are required to have a minimum weight of 25%. The core competencies are required of all employees. There are two additional leadership competencies for people managers. The 11 additional behavioral competencies can be added to Section 1 as needed. This section is rated and allows for overall comments.

Leadership Competencies (people managers & other leaders)	Comments	Rating
Talent Management - Clearly establishes and communicates goals and accountabilities; monitors and evaluates performance; provides effective feedback and coaching; identifies development needs and helps employees address them to achieve optimal performance and gain valuable skills that will translate into strong performance in future roles.		
Transformers of Government - Develops, recommends, or implements innovative approaches to address problems and drive continuous improvement in State programs and processes; drives effective and smooth change initiatives across the State by communicating, confirming understanding and activity working with stakeholders to overcome resistance.		
Other Behavioral Competencies	Comments	Rating
Note: Calculate the overall section rating by adding the ratings for the individual items in the section, and then by dividing that total by the number of items in the section.	Overall Section Rating:	
	Section Weight (not less than 25%):	25%

The section weights are determined by the agency. The manager will need to consult with HR regarding the appropriate weighting.

Section 1: Overall Comments:	

Managers can add any overall comments regarding the competencies in this section during the mid-year or annual performance period.

PART 4

Section 2: Individual Goals (Weighting can range from 0% to 75% of total score)		
	Comments	Rating
Goal 1:		
Goal 2:		
Goal 3:		
Goal 4:		
Goal 5:		
<i>Note: Calculate the overall section rating by adding the ratings for the individual items in the section, and then by dividing that total by the number of items in the section.</i>	Overall Section Rating:	
	Section Weight:	25%
Section 2: Overall Comments:		

PART 4: The Individual Goals section describes any projects, assignments or activities performed throughout the year. The goals should be based on the SMART (Specific, Measurable, Achievable, Relevant and Time-bound) criteria and written at the successful performer level. This section is rated and allows for overall comments.

Blank rows are provided to include additional goals if needed. If using the Excel form, managers should not delete these rows as it could impact the template's ability to correctly calculate the overall rating.

The section weights are determined by the agency. The manager will need to consult with HR regarding the appropriate weighting.

Managers can add any overall comments regarding the individual goals in this section during the mid-year or annual performance period.

PART 5

Section 3 – Job Responsibilities (Weighting can range from 0% to 75% of total score)			
		Comments	Rating
Job Responsibility 1:			
Job Responsibility 2:			
Job Responsibility 3:			
Job Responsibility 4:			
Job Responsibility 5:			
<i>Note: Calculate the overall section rating by adding the ratings for the individual items in the section, and then by dividing that total by the number of items in the section.</i>		Overall Section Rating:	
		Section Weight	50%
Section 3: Overall Comments:			

PART 5: The Job Responsibilities section evaluates employee success in completing tasks specific to the position. The responsibilities can be translated into goals that are measurable. This section is rated and allows for overall comments.

Managers can add blank rows to include additional job responsibilities if needed. If using the Excel form, managers should not delete these rows as it could impact the template’s ability to correctly calculate the overall rating.

The section weights are determined by the agency. The manager will need to consult with HR regarding the appropriate weighting.

Managers can add any overall comments regarding the job responsibilities in this section during the mid-year or annual performance period.

PART 6

Section 4: Employee Comments

PART 6: The employee comment section allows the employee to make comments regarding the manager’s evaluation and their overall performance.

PART 7**Section 5: Manager Comments**

--

PART 7: The manager comment section allows the manager to comment on the employees' performance throughout the rating period and address any areas that need improvement.

PART 8**Section 6: Overall Rating**

Section 1 Rating:		Section 1 Weighting:	30%	Weighted Rating Section 1:	
Section 2 Rating:		Section 2 Weighting:	30%	Weighted Rating Section 2:	
Section 3 Rating:		Section 3 Weighting:	40%	Weighted Rating Section 3:	
<i>Note: Calculate the overall rating by multiplying the ratings for each section by the weighting for each section. This will give you the weighted ratings for each section. Add the weighted ratings together for the overall rating.</i>				OVERALL RATING:	
Key Accomplishments for Review Period					

PART 8: Once all the sections have been rated, an overall rating will be calculated for the section. The overall rating is calculated using a weighted average. This allows for the rating of each section and the weight given to each section to be calculated giving the overall rating that the employee receives.

Additional key accomplishments for the review period can be documented in this section.

PART 9**Section 7 - Individual Development Plan (not rated or weighted)**

		Comments
Development Action 1:		
Development Action 2:		
Development Action 3:		
Development Action 4:		
Development Action 5:		

PART 9: The manager and the employee will collaborate to create the Individual Development Plan. The IDP identifies activities, projects, classes or seminars that contribute to the development of the employee.

PART 10

Signatures	
I have reviewed the content of this form with my supervisor.	
Employee Signature:	Date:
Supervisor/Manager:	Date:
Reviewing Manager:	Date:

PART 10: The signature section requires the employee, manager and reviewing manager to sign the evaluation. This is only an acknowledgement of the performance discussion.