

**Performance
Planning
& Review
Supervisory
Responsibilities**

Background

The Louisiana Department of State Civil Service requires State agencies to evaluate all classified State employees using a performance planning and review system designed and approved by Civil Service.

Steps in the Performance Planning & Review Process

- Planning
- Observation, Documentation, and Feedback
- Review

What is a Planning Session?

A planning session is when a supervisor writes performance expectations for his/her employee using a Performance Planning & Review (PPR) form.

After writing the expectations, the supervisor must meet with the employee to go over the expectations with the employee.

The supervisor and employee are required to sign the “Performance Planning Session – Signature” page located on page 7 of the PPR form.

The employee is given a copy of the PPR form and the original PPR form is forwarded to Human Resource Management.

When to conduct a planning session

A planning session must be conducted within 30 days after a employee is hired,

No later than 30 days after the anniversary (merit) date of a current employee,

No later than 30 days after a position change with significantly different duties of a current employee.

Performance Planning

- New Hire Example:

Jane was hired as a Administrative Coordinator 3 on April 22, 2009.

Jane's supervisor must conduct a performance planning session with Jane no later than May 21, 2009.

Performance Planning

- Current Employee Example:

Charles has been employed with the Department of Animal Care for 7 years, his merit date is March 18th.

Charles' supervisor must conduct a planning session with Charles no later than April 17th each year.

Performance Planning

- Position Change Example:

Mary is a Custodian 1, after successfully completing a probationary period her department is recommending that she be reallocated/promoted to a Custodian 2 effective June 21, 2009.

Mary's supervisor must conduct a new planning session with Mary no later than July 20, 2009.

PPR Documentation

- Documentation shall be maintained to support any performance rating of “Poor” or “Needs Improvement.”
- Documentation must be attached to the Performance Rating forms for any performance factor rated “Needs Improvement or Poor.”
- Documentation should be maintained to support any PPR rating.

Performance Rating

- 60 days prior to an employee's merit date, Human Resource Management will send a merit recommendation forms with an informational coversheet

The informational coversheet notifies the rating supervisor of the deadline for conducting a Performance Rating (evaluation) session with an employee.

What is a performance rating session?

A performance rating session is when a supervisor evaluates his/her employee based on the performance expectations listed in the performance planning document.

The Rating Session Timeline

Rating sessions may be conducted 60 days prior to an anniversary date.

Rating sessions must be conducted before the employee's Anniversary (merit) Date.

Re-Rating Session

- If an employee's overall rating is "Needs Improvement or Poor" the employee must be re-rated no later than six months from his/her merit date.
- Example:
 - Jim received an overall performance rating of "Needs Improvement" on January 16, 2009.
 - Jim's supervisor must re-rate Jim no later than July 16, 2009.
 - Please contact Human Resources for more information regarding re-ratings.

Civil Service Rule 10.2

Rating Supervisor

- Civil Service Rule 10.2(b)

The Rating Supervisor shall be responsible for administering the performance planning and review system for his designated employees in accordance with these Rules and agency policy. Failure of the Rating Supervisor to administer the performance management system in accordance with these Rules shall result in his not being eligible for a merit increase for that year.

Important Points about PPR forms

- The supervisor and employee should each maintain a copy of completed PPR forms.
- Original PPR forms are sent to Human Resources.
- A copy of the PPR form can be found on the Human Resource website:
- <http://www.lsuhscc.edu/no/administration/hrm/Forms.aspx>

Additional Resource

- Please contact Bill Dalton at (504) 568-5798 or e-mail address: wdalto@lsuhsc.edu if you need additional assistance with setting up your Performance Planning & Review process.