



Purpose: To provide a checklist for State of Florida agencies to track completion of their readiness activities as they implement the new Performance Management Methodology.

Communications	Activity Dates	Completed (initials)
<input type="checkbox"/> 1. Forward Communication to Managers – Deploy DMS communications from agency head to agency managers regarding the Performance Management Initiative.	March 2013	
<input type="checkbox"/> 2. Initial Communications with Employees – Deploy communications from agency leadership to agency employees regarding the Performance Management Initiative.	March - June 21, 2013	
<input type="checkbox"/> 3. Ongoing Communications with Employees <ul style="list-style-type: none"> a. Develop a communication plan to educate agency employees on the new Performance Management methodology b. Ensure all agency FTE employees have received educational information <p>NOTE: Agencies will utilize DMS produced <i>Performance Matters</i> items in conjunction with agency produced materials.</p>	May – November 30, 2013	

Transition Plan – Cycle A: Agencies with Current Evaluation Cycles that began prior to January 1, 2013	Activity Dates	Completed (initials)
<input type="checkbox"/> 1. Closeout Performance Evaluations Agencies with evaluation periods that began prior to January 1, 2013 must close out (and rate) employee evaluations in their current process for performance through June 30, 2013. <ul style="list-style-type: none"> a. Rate employees b. Discuss final evaluations with employees c. Complete the evaluation process, including employee acknowledgment 	July 1 - August 29, 2013	
<input type="checkbox"/> 2. Open New Performance Evaluations Agency managers open employee performance evaluations (using the People First System) for the evaluation period July 1 - December 31, 2013. <ul style="list-style-type: none"> a. Set job specific performance expectations b. Discuss performance expectations with employees c. Complete the employee acknowledgement process 	July 1 – 31, 2013	
<input type="checkbox"/> 3. Closeout Performance Evaluations Ending December 31, 2013 Agency managers rate performance and discuss evaluations with employees. <ul style="list-style-type: none"> a. Rate employees b. Discuss final evaluations with employees c. Complete the evaluation process, including employee acknowledgment 	January 1 - March 1, 2014	

<input type="checkbox"/>	<p>4. Open Performance Evaluations Dated January 1 – June 30, 2014 Agency managers open employee performance evaluations for the evaluation period January 1 – June 30, 2014.</p> <ul style="list-style-type: none"> a. Set job specific performance expectations (SMART) b. Discuss performance expectations with employees c. Complete the employee acknowledgement process 	December 2013 – January 31, 2014	
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Transition Plan – Cycle B: Agencies with Current Evaluation Cycles that began on or after January 1, 2013		Activity Dates	Completed (initials)
<input type="checkbox"/>	<p>1. Set Employee Expectations Agency managers set job specific performance expectations (using the People First system) for the evaluation period ending December 31, 2013. NOTE: These expectations may be copied from the original expectations set at the beginning of the evaluation period and pasted into the electronic system; provided there are NO changes to the expectations.</p>	July 1 – 31, 2013	
<input type="checkbox"/>	<p>2. Closeout Performance Evaluations Ending December 31, 2013 Agency managers rate performance and discuss evaluations with employees.</p> <ul style="list-style-type: none"> a. Rate employees b. Discuss final evaluations with employees c. Complete the evaluation process, including employee acknowledgement 	January 1 – March 1, 2014	
<input type="checkbox"/>	<p>3. Open Performance Evaluations Dated January 1 – June 30, 2014 Agency managers open employee performance evaluations for the evaluation period January 1 – June 30, 2014.</p> <ul style="list-style-type: none"> a. Set job specific performance expectations (SMART) b. Discuss performance expectations with employees c. Complete the employee acknowledgement process 	December 2013 – January 31, 2014	

Training		Activity Dates	Completed (initials)
<input type="checkbox"/>	<p>1. Train-the-Trainer Sessions (Curriculum Development Team – Led) Agencies will attend sessions to receive tools and guidance on implementing training within agencies.</p>	April 1 – May 9, 2013	
<input type="checkbox"/>	<p>2. Agency Training for Managers on Methodology (Agency – Led)</p> <ul style="list-style-type: none"> a. Develop a training plan, by June 14, 2013, for deploying <i>Managing Employee Performance</i> training to all agency managers b. Deliver training to all managers 	May – September, 2013	

Developing Expectation Activities	Activity Dates	Completed (initials)
<input type="checkbox"/> 1. Position Descriptions Agency managers review and update (as necessary) position descriptions to ensure they accurately reflect the duties and responsibilities of the position.	June – August 2013	
<input type="checkbox"/> 2. Agency Performance Goals a. Agency leadership establishes agency goals	April – June 30, 2013	
<input type="checkbox"/> 3. SMART Expectations After participating in training, agency managers develop SMART expectations based on established agency goals. a. Determine agency wide SMART expectations b. Determine if there are job specific SMART expectations that should be used for all positions with the same job duties c. Require managers to create job specific SMART expectations	May – December 20, 2013	
<input type="checkbox"/> 4. Agency Wide & Job Specific Expectations to People First Submit agency wide SMART expectations (or those job specific SMART expectations for agencies using an “offline” system) must be submitted to the People First team to be loaded into the system.	October 31, 2013	

Initial Agency Readiness Certification – Due by June 14, 2013

Signing below attests that your agency has completed all readiness activities relating to initial communications with employees and agency managers on the Performance Management Methodology. This includes distributing communications about the new process, and evaluation timeframes, as well as additional items your agency deems necessary. This certification also indicates that the agency has attended a Train-the-Trainer session and has developed a training plan to train all managers on the new Performance Management methodology.

Signature _____ Title _____ Date _____ Agency _____

Second Agency Readiness Certification – Due by October 31, 2013

Signing below attests that your agency has completed training of all managers on the new Performance Management methodology and that agency managers are required to create job specific SMART expectations for the January 1 – June 30, 2014 evaluation cycle.

Signature _____ Title _____ Date _____ Agency _____

Final Agency Readiness Certification – Due by December 20, 2013

Signing below attests that your agency has completed all readiness activities (items contained in this document, as well as additional items your agency deems necessary) relating to the January 1, 2014 implementation of the Performance Management process including SMART expectations.

Signature _____ Title _____ Date _____ Agency _____