



JAY DARDENNE
LIEUTENANT GOVERNOR

State of Louisiana
OFFICE OF THE LIEUTENANT GOVERNOR
DEPARTMENT OF CULTURE, RECREATION & TOURISM
OFFICE OF MANAGEMENT AND FINANCE

CHARLES R. DAVIS
DEPUTY SECRETARY

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HUMAN RESOURCES MEMORANDUM NO. 2013-019

TO: All Employees of the Office of the Lieutenant Governor (OLG) / Department of Culture, Recreation, and Tourism (DCRT)

FROM: Rikki Nicole David, SPHR *(RND)*
Human Resources Director

SUBJECT: PES Plannings and Evaluations Due

DATE: July 1, 2013

Supervisors: Please be advised that the following documents must be completed and submitted to the Human Resources Division for each of your assigned, classified staff members in accordance with the guidelines and deadlines below:

1. Performance Evaluation – Due no later than August 31, 2013

- Open the electronic copy of the PES planning document that you previously completed in which you detailed the performance expectations for your staff member;
- Under the *Documentation/Comments related to Work* section, insert text that explains whether the employee met his/her Work expectations;
- Under the *Documentation/Comments related to Behavior* section, insert text that explains whether the employee met his/her Behavior expectations;
- Print out the completed document;
- Remove the blank page 1 and instead attach the completed page 1 from the employee's original/signed PES planning document;
- For the *Evaluation Period* on page 1, write in the dates for which the employee is being evaluated. If the employee has worked the entirety of the Fiscal Year, the evaluation period would be "7/1/2012 – 6/30/2013." If an employee was not hired until 10/18/2012, that person's evaluation period would be "10/18/2012 – 6/30/2013."
- Decide upon the employee's Overall Evaluation and check the appropriate rating on page 1 (i.e., Needs Improvement/Unsuccessful, Successful, or Exceptional).
- By Civil Service Rule, you must attach supporting documentation to the PES Evaluation if the assigned Overall Evaluation is Needs Improvement/Unsuccessful or Exceptional;
- Once completed, submit to the second-level evaluator for signature;

- Upon return, conduct a PES Evaluation session with the employee wherein you and the employee discuss and sign the *Evaluation Session* section of page 1. ** Even though there is not a designated line for it, the employee MUST insert the date next to his/her signature;
- Upon completion, make a copy for yourself and the employee;
- Submit the original-signed PES Evaluation (with supporting documentation attached, if necessary) to the HR Division **no later than 8/31/2013**.

2. Performance Plan – Due no later than September 30, 2013

- Electronically access the appropriate PES form on Channel Z based on whether the subject subordinate is a supervisor and by which Office the person is employed. ** Please note that the PES form has been updated to include a Date line for the employee's signature under the *Evaluation Session* header, so it is important that you use the most up-to-date version of the form;
- Complete the *Employee Information* section of page 1, with the exception of the Evaluation Period which should be left blank. The *Performance Year* is “7/1/2013 – 6/30/2014”;
- Under the *Work Expectations* section, insert your expectations for the subject employee relative to his/her work;
- Under the Behavior Expectations section, insert your expectations for the subject employee relative to his/her behavior;
- Print out the completed document;
- Submit to the second-level evaluator for signature;
- Upon return, conduct a PES planning session with the employee wherein you and the employee discuss and sign the *Planning Session* section of page 1;
- Upon completion, retain the original-signed PES Planning in your supervisory files;
- Make two copies of the signed PES Planning and provide to both the employee and the HR Division **no later than 9/30/2013**.

Because this can be a time-intensive process, we encourage supervisors to begin the process of drafting their assigned PES Evaluations and Plannings immediately.

Despite having separate deadlines, we also strongly recommend, for purposes of efficiency, that supervisors complete the PES Evaluation and Planning processes at the same time. This can be achieved by submitting both documents together for second-level approval and conducting both the PES evaluation and PES planning sessions within the same meeting.

If you have any questions regarding the PES process, or what is required in order to complete it, please feel free to contact:

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Bobbie Scott	bscott@crt.la.gov	(225) 342-0880

RND:ap
c: Personnel Liaisons

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