



## FY24 Performance Management Cycle Timeline

The following timeline is a full performance management cycle timeline for all Montgomery County employees excluding *MLS, PLS and GSS Longevity*. The Performance Management Timeline is a guide to ensure creation, review, approval, and finalization of FY24 performance plans, evaluations and appraisals are completed timely and accurately for all County employees.

	Completed	Deadline	Action	Role
Phase 1: PLAN	<input type="checkbox"/>	Jul 1, 2023	OHR open performance plans in Oracle WPM	OHR WPM Plan Manager/Administrator
	<input type="checkbox"/>	Jul 1, 2023	Begin the creation of employees' performance plans for the fiscal year: <i>goals, objectives and development plans</i>	Supervisor Employee
	<input type="checkbox"/>	Aug 14, 2023	Confirm and establish employee performance plans: <ul style="list-style-type: none"> <li>Non-Bargaining Unit (NBU) employees' plans in Oracle WPM and/or;</li> <li>Paper Performance Planning and Evaluation (PPE) forms for Bargaining Unit (BU) employees</li> </ul>	Supervisor
	<input type="checkbox"/>	No later than 10 days after plan is established	Provide employee with a copy of the signed performance plan	Supervisor
	<input type="checkbox"/>	Aug 17, 2023	<ul style="list-style-type: none"> <li>Generate Performance Plans and Appraisal Status Monitor Reports</li> <li>Ensure employee WPM performance plans and paper PPE forms are created</li> </ul>	HR Liaison
	<input type="checkbox"/>	Ongoing	<ul style="list-style-type: none"> <li>Provide and/or solicit feedback from your supervisor on your performance</li> <li>Discuss training and career development opportunities with your supervisor</li> </ul>	Employee
Phase 2: DEVELOP	<input type="checkbox"/>	Jan 31, 2024	Schedule, conduct and document mid-year progress discussions with employees	Supervisor
	Document, sign and date mid-year progress discussion forms (electronic appraisals are date-stamped when routed)		Employee	
	<input type="checkbox"/>	Ongoing	<ul style="list-style-type: none"> <li>Provide and/or solicit feedback from your supervisor on your performance</li> <li>Discuss training and career development opportunities with your supervisor</li> </ul>	Employee
			Conduct frequent performance coaching sessions throughout the year with your employees	Supervisor
Phase 3: EVALUATE	<input type="checkbox"/>	June 3, 2024	Document and provide performance accomplishments to your supervisor on your online appraisal or paper PPE form	Employee
	<input type="checkbox"/>	*June 30, 2024	<ul style="list-style-type: none"> <li>Enter performance appraisal ratings and comments online (WPM) and paper (PPE)</li> <li>Employee enters final overall rating comments (<i>optional</i>) in Oracle WPM or paper PPE form</li> <li>Share and gain final approval from Reviewing Official</li> </ul>	Supervisor Employee Reviewing Official
	<input type="checkbox"/>	**August 29, 2024	Finalize (with signature and/or electronic date stamp) all performance evaluations.	Supervisor Employee Reviewing Official
	<input type="checkbox"/>	***August 29, 2024	<ul style="list-style-type: none"> <li>Generate Performance Planning and Appraisal Status Monitor reports</li> <li>Ensure all employee evaluations are completed in WPM and on paper PPE forms</li> <li>Submit paper PPE forms to Core HR/Records Management EOB 12th Floor</li> </ul>	HR Liaison

**NOTES:**

- \*Supervisors must send online performance evaluations to employee for final overall rating comments **before** sending evaluations electronically to Reviewing Officials for final approval
- \*\*Performance plans/evaluations are completed when the Reviewing Official finalizes in the system or signs the paper performance evaluation forms
- \*\*\*HR Liaisons should generate, save, and provide copies of the finalized appraisals to employees and the supervisors

**WPM Tools and Resources**

Visit [Performance Management Resources](#) and [WPM System Training Materials](#) for available online resources including policies and procedures, forms and guidelines

**Questions**

Your department HR Liaison is your first point of contact for performance management questions

If you have additional questions, please contact the Performance Management team at [Performance.Matters@montgomerycountymd.gov](mailto:Performance.Matters@montgomerycountymd.gov)