**MONTGOMERY COUNTY, MARYLAND**

OPT/SLT PERFORMANCE PLANNING AND EVALUATION FORM

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| **EMPLOYEE INFORMATION** | | |
| Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Employee Oracle ID Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Job Title: | Department: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Division/Team: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |
| Supervisor Name(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Reviewing official Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |
| Type of Evaluation   * Annual ☐ Interim | Review Period  From (date) to (date) | |
| **DOCUMENTATION SIGNATURES** | | |
| **Activity to be documented** | **Date** | **Signature** |
| Performance Plan Finalized (Employee) |  |  |
| Performance Plan Finalized (Supervisor) |  |  |
| Mid-Year Progress Discussion (Employee) |  |  |
| Mid-Year Progress Discussion (Supervisor) |  |  |
| Evaluation Reviewed by Employee\* |  |  |
| Evaluation Finalized by Supervisor |  |  |
| Evaluation Reviewed by Reviewing Official |  |  |
| **ACKNOWLEDGEMENT OF RECEIPT OF EVALUATION** | | |
| \*Your signature indicates that you have read and discussed this evaluation with your supervisor, but does not necessarily indicate that you agree with the comments or overall evaluation. You may write any comments you would like to make in the space below or on a separate sheet you attach to this form. | | |
| **OVERALL RATING** | | |
| * Outstanding | | |
| * Meets Expectations | | |
| * Above Expectations | | |
| * Below Expectations | | |
| * Does Not Meet Expectations | | |
| Note for automated versions of this form: This form is in a Word table’s format. Each row will expand as you type into it. All automated forms must be safeguarded or password protected from unauthorized viewing. | | |

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| **PERFORMANCE PLAN** | |
| **PERFORMANCE EXPECTATIONS/STANDARDS** | |
| **Competencies** | |
| **Competency** | **-Mandatory: Racial Equity and Social Justice (\*New)** |
| **Description** | **Racial Equity and Social Justice (RESJ)** involves complying with applicable laws and regulations to dismantle structural racism within County Government. It is an intentional and ongoing process aimed at reducing and eliminating racial disparities while ensuring equitable outcomes for all. It includes activities aimed at identifying and addressing racial disparities and promoting equitable outcomes for historically oppressed people and communities. It also involves  changing policies, practices, systems, and structures to remove barriers, redress historical inequities, elevate community voices, and ensure equitable treatment of everyone. |
| **Behavior Indicator** | Contributes to departmental and countywide RESJ goals. Demonstrates understanding of the racial equity and social justice framework within the workplace and community. Speaks out against instances of systemic racism or organizational practices that may exclude people based on race, gender, ability, etc. Takes action that shows consideration for cultural concerns and expectations. Follows established procedures, programs, or policies to support racial equity and inclusion in everyday work. Participates in learning opportunities on RESJ, and applies learning to everyday  work and/or projects. |
| **Behavior Indicator - Rating Levels** | |
| * Outstanding | This rating applies to performance that consistently exceeds the requirements of the job identified in the performance standards outlined in the performance plan. |
| * Expectations Above | This rating applies to performance that has met, and occasionally exceeds the requirements of the job identified in the performance standards outlined in the performance plan. |
| * Meets Expectations | This rating applies to performance that has met the requirements of the job identified in the performance standards outlined in the performance plan. |
| * Below Expectations | This rating category indicates that the employee has met some job requirements but needs improvement in other job requirements outlined in the performance plan. |
| * Does Not Meet Expectations | This rating applies to performance that has not met the basic requirements of the job outlined in the  performance standards outlined in the performance plan. A rating at this level would be considered unsatisfactory performance. |
| **Narrative Comments** | |
| **RESJ Compliance examples**: Employees, including supervisors, request to attend are RESJ trainings. Employees, including supervisors are attending RESJ trainings. Supervisors and/or employees are reporting non-RESJ compliance to ORE office.  **RESJ Non-Compliance examples**: Supervisors do not take responsibilities of ensuring RESJ compliance. Supervisors are not demonstrating RESJ compliance when assigning work duties and responsibilities or are dismissive when faced with fostering racial equity and inclusion in everyday work Employees do not speak out against racism towards diverse  people/team members. Employees do not attend RESJ trainings. Supervisors/employees fail to comply with County’s RESJ rules and procedures related to equitable treatment of others based on race, sex, religion, national origin, etc. | |

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| **Competency** | **-Mandatory: Safe Work Environment** |

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| **Description** | **Office/Internal Environment Safe Work Environment** in an office/internal setting involves taking actions to ensure that employees and citizens are relatively free from safety hazards by proactively identifying safety issues and concerns, ensuring that file cabinet drawers are closed when they are not in use and carpeting is not torn and cords are not exposed in order to prevent accidents from occurring.  **External Environment Safe Work Environment** in an external setting involves taking actions to ensure that employees and citizens are relatively free from safety hazards by proactively identifying safety issues and concerns, ensuring employees follow special or strict safety procedures and/or precautions, and/or use special equipment, such as hard hats, respiratory  masks, insulated or protective clothing and/or footwear, gloves, shields and ear protectors. |
| **Behavior Indicator - Rating Levels** | |
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| **Narrative Comments:** | |
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***NOTE: “Meets Expectation”*** *is an appropriate rating for this competency.*

Click [**here**](https://www.montgomerycountymd.gov/HR/Resources/Files/Perform/GSSandMCGEORatings(1).pdf)to add access additional applicable competencies to add to the performance plan.

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| **OBJECTIVES** | |
| **Objective/ Expectation Name** |  |
| **Details** |  |
| **Success Criteria/Targets** |  |
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| **CAREER DEVELOPMENT** |
| **Goal or Competency to be developed**: |
| **Year End Accomplishment Summary**: |
| **PROGRESS DISCUSSION NOTES**  **TO DOCUMENT THE MID-YEAR PROGRESS DISCUSSION** |
| **Supervisor**: |
| **Employee**: |
| **COMMENTS** |
| **Supervisor**: |
| **Employee**: |
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| **DEFINITIONS FOR PERFORMANCE RATINGS** |
| **Outstanding**  This rating applies to performance that consistently exceeds the requirements of the job identified in the performance standards outlined in the performance plan.  **Above Expectations**  This rating applies to performance that has met, and occasionally exceeds the requirements of the job identified in the performance standards outlined in the performance plan.  **Meets Expectations**  This rating applies to performance that has met the requirements of the job identified in the performance standards outlined in the performance plan.  **Below Expectations**  This rating category indicates that the employee has met some job requirements but needs improvement in other job requirements outlined in the performance plan.  **Does Not Meet Expectations**  This rating applies to performance that has not met the basic requirements of the job outlined in the performance standards outlined in the performance plan. A rating at this level would be considered unsatisfactory performance. |