

25 NCAC 01O .0109 PERFORMANCE MANAGEMENT DEFINITIONS

The following definitions shall apply to all rules in this Subchapter:

- (1) "Annual Performance Evaluation" means the comprehensive review of the employee's performance, relative to the goals and values throughout the entire performance cycle as defined in 25 NCAC 01O .0110. The annual performance evaluation contains a final overall rating.
- (2) "Calibration Session" means a confidential discussion between same-level managers or supervisors facilitated by the next-level manager, supervisor or designated Human Resources representative, to evaluate work distribution, goal alignment, goal validity, results, and final ratings.
- (3) "Coaching Session" means either a formal discussion with documentation or an informal discussion without documentation between a manager or supervisor and employee to provide feedback and reinforce desired work actions and behavior.
- (4) "Counseling Session" means a formal discussion with documentation between a manager or supervisor and an employee to provide specific feedback and initiate a Performance Improvement Plan to develop a strategy for an employee to raise his or her performance to a minimum of "Meets Expectation."
- (5) "Formal Discussion" means a discussion with documentation between a manager or supervisor and employee.
- (6) "Goals" means organizational, division, work unit, and individual level outcomes that support the strategic mission of the organization. All goals must be relevant to agency goals/mission.
- (7) "Individual Development Plan" means a plan used to identify areas of development so an employee will have the skills, knowledge and abilities he or she needs to meet the organization's goals and objectives, and is given an opportunity to develop competencies that will allow him or her to be successful in the future.
- (8) "Informal Discussion" means a discussion without documentation between a manager or supervisor and employee.
- (9) "Interim Review" means a formal discussion with documentation of such at the mid-point of the performance cycle between a manager or supervisor and an employee to review the employee's progress and make any necessary adjustments (e.g., adding new goals and tasks or canceling existing goals and tasks if priorities have changed, changing the weights assigned to goals and tasks) or initiate additional performance-related documentation.
- (10) "Permanent Employee" means an employee who is in a permanent position and has attained career status by being continuously employed by the State in a position subject to the State Human Resources Act for the immediate 12 preceding months.
- (11) "Performance Expectation" means a goal, value, or both, defining outcomes and behaviors that are documented on a performance plan to identify results to be accomplished and how the work should be accomplished.
- (12) "Performance Improvement Plan" means a written document issued to an employee by a manager or supervisor that provides instructions to the employee about the action or actions the employee shall take to improve performance or conduct deficiencies to the "Meets Expectations" level of performance. A performance improvement plan is issued to an employee who maintains employment and serves as a disciplinary action.
- (13) "Performance Plan" means a description of the goals and values to be accomplished by the employee within the performance cycle, with emphasis on the goals and results to be achieved and how those results will be measured.
- (14) "Position Description" means a statement or set of duties and responsibilities that represents the major functions of a job that must be performed to meet the agency's needs.
- (15) "Probationary Employee" means an employee who is in a permanent position but has not attained career status by being continuously employed by the State in a position subject to the State Human Resources Act for the immediate 12 preceding months.
- (16) "Satisfactory Performance" means performance for which the employee consistently meets expectations and occasionally exceeds expectations.
- (17) "Time-Limited Employee" means an employee who is in a time-limited position and is not eligible for career status.
- (18) "University" means the constituent institutions of the University of North Carolina.

- (19) "Values" means qualitative behavioral attributes that document how work actions should be accomplished. Values reflect core organizational beliefs that guide and motivate actions supporting the accomplishment of the agency mission and goals.

*History Note: Authority G.S. 126-4;
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