

INTERIM/ANNUAL PERFORMANCE REVIEW

Check Type of Review:	Interim Part B	Annual Part C	Work Planning Period Ending:	
	_____	_____	_____	_____
Employee's Name:	_____		_____	_____
	Last	First	MI	Date Completed
Department Name	_____			
Position Title:	_____		Position Number:	_____
Date Appointed To This Position:	_____			
Supervisor Completing This Form:	_____			
Date Performance Review was Completed:	_____			

Instructions

Part B - Interim Performance Review & Part C - Annual Performance Review: Throughout the Performance Management cycle the supervisor should track performance by periodically reviewing the employee's actual performance and maintaining documentation about that performance. The supervisor will then summarize the performance information and record it during an Interim Performance Review conducted in December of each year and record it during an Annual Performance Review conducted in May of each year. The information on the Interim Performance Review/ Annual Performance Review form are the basis for an overall performance rating that is given at the end of each Performance Management cycle. The North Carolina rating scale identifies the overall ratings.

In Part I of this form, the supervisor documents the employee's Actual Performance for each Key Responsibility. The supervisor records specific results achieved and the "behaviors" (i.e., knowledge, skills, abilities and methods) demonstrated to produce the results. When documenting Actual Performance, describe the quality, quantity or other appropriate measures as described in the Performance Expectations that are listed on the Part A – Work Plan.

Throughout the Performance Review process, the supervisor and the employee refer to the Key Responsibilities and Performance Expectations that comprise the employee's Work Plan. To evaluate the employee's performance, the supervisor compares the employee's Actual Performance with the Performance Expectations outlined in the Work Plan – Part A.

Based on the review of the employee's Actual Performance, the supervisor determines the appropriate Performance Rating for each Key Responsibility and records that rating under Part I, "Performance Rating," using the North Carolina Rating Scale. (The numbers under Part I, "Key Responsibilities" coincide with the Key Responsibilities numbers shown on the employee's Part A - Work Plan.)

The supervisor completes Parts I and II for the Interim Review-Part B and completes Parts I, II, and III for the Annual Review-Part C. The supervisor discusses the employee's performance with the next higher level supervisor. After reaching an agreement on the proposed evaluation, the supervisor conducts the Performance Review Interview with the employee. Proposed performance ratings may be revised based on the supervisor-employee Performance Review Interview.

As part of the Interim and Annual Performance Review meeting and discussion, the employee adds comments, if any, in Part IV and signs the form in Part V. The supervisor gives a copy of the signed and completed form to the employee, sends a copy to Human Resources and retains the original in the department file.

Reminder: The Development Plan – Part D is strongly recommended for all employees and is mandatory for an employee whose performance of any expectation is less than the "Good Performance" level as of the Interim Review, the Annual Review, or any other significant time during the cycle. If there are no performance deficiencies or new skills required to maintain performance at or above the "Good Performance" level, an employee may elect not to participate in optional training and development activities.

INTERIM/ANNUAL PERFORMANCE REVIEW

Part I – Evaluation of Performance for each Key Responsibility and for each Behavioral Measure as described on the Work Plan – Part A.

List the Key Responsibility number and Behavioral Measure number that coincides with the Work Plan and record information about Actual Performance to be discussed with the employee during the Interim and Annual Performance Reviews. Determine the Performance Rating for each Key Responsibility. As a means to show the employees’ progress in each Key Responsibility, list the interim information and rating on one row and at the time of the annual review, list the annual information and rating on the row below the interim information. This order of information will show the employees’ progress between reviews. DO NOT copy the language of the interim review to the annual review.

You may add additional rows (or remove rows) to the table below to match the number of Key Responsibilities on the employee’s Work Plan. Cells will expand as needed.

Key Responsibility & Behavioral Measures #	Actual Performance	Performance Rating
INTERIM 1		
ANNUAL 1		
INTERIM 2		
ANNUAL 2		
INTERIM 3		
ANNUAL 3		
INTERIM 4		

INTERIM/ANNUAL PERFORMANCE REVIEW

Key Responsibility & Behavioral Measures #	Actual Performance	Performance Rating
ANNUAL 4		
INTERIM 5		
ANNUAL 5		
INTERIM 1		
ANNUAL 1		
INTERIM 2		
ANNUAL 2		
INTERIM 3		
ANNUAL 3		

INTERIM/ANNUAL PERFORMANCE REVIEW

INTERIM PERFORMANCE REVIEW SECTION (Use this section when completing the Interim Performance Review)

Part II - Interim Performance Review – Part B - Supervisor's Summary Evaluation Statement

Summarize the employees' job performance based on expectations. Record specific results achieved and behaviors demonstrated. Compare the employee's performance and behavioral expectations listed on the Work Plan with demonstrated results. Identify expectations of improvement.

Note: Part III is used only for the Annual Performance Review and is located on the Annual Performance Review section.

Part IV of Interim Performance Review - Part B - Employee's Comments (optional)

- I agree with this review.
- I do not agree with this review.

Employee Comments (optional):

Part V of Interim Performance Review – Part B - Signatures

(The employee is required to sign this form. The signature indicates only that the performance interview was held, not agreement with the statements or ratings contained in it.)

Employee's Signature

Supervisor's Signature

Next Higher Supervisor's Signature

Date

Date

Date

INTERIM/ANNUAL PERFORMANCE REVIEW

ANNUAL PERFORMANCE REVIEW SECTION (Use this section when completing the Annual Performance Review)

Part II - Annual Performance Review - Part C - Supervisor's Summary Evaluation Statement

Summarize the employees' job performance based on expectations. Record specific results achieved and behaviors demonstrated. Compare the employee's performance and behavioral expectations listed on the Work Plan with demonstrated results. Identify expectations of improvement.

Part III - Annual Performance Review - Part C - Overall Evaluation

Check the required Overall Evaluation on the Annual Performance Review.

Outstanding Performance	Very Good Performance	Good Performance	Below Good Performance	Unsatisfactory Performance

Part IV - Annual Performance Review - Part C - Employee's Comments (optional)

- I agree with this review.
- I do not agree with this review.

Employee Comments (optional):

Part V - Annual Performance Review - Part C - Signatures

(The employee is required to sign this form. The signature indicates only that the performance interview was held, not agreement with the statements or ratings contained in it.)

Employee's Signature

Supervisor's Signature

Next Higher Supervisor's Signature

Date

Date

Date