

HR TRANSFORMATION WEBINAR



North Carolina

Performance Management Changes

OSHR Webinar | Tuesday, September 29, 2026

Managing Employee Work Policy

WORKING
FOR **YOU**



Agenda

Part 1	Words from Director Meyer
Part 2	Why this policy changed
Part 3	General policy information
Part 4	Key changes & Check-Ins
Part 5	Q&A

Words From Director Staci Meyer

Why This Policy Changed

HR Transformation

"We want to move forward making performance conversations more useful, more frequent, less complicated, and more focused on your growth."

Why This Policy Changed

We Heard You!

1

Built on your feedback:

***We gathered direct input from
NC state employees,
managers, agency
administrators and research
from other states.***

2

Growth & development focused:

***Career development can be a
built-in part of every
performance conversation.***

3

More useful and more often feedback:

***Feedback when it matters,
not just at year-end.***

4

A new name for a new approach:

Managing Employee Work

General Policy Information

Who Does This Policy Cover?

This policy is for state employees — and it's built to support everyone's growth.

Covered

- Permanent employees
- Probationary employees
- Time-limited employees
- Certain Exempt employees
(Agency Decision)

Not Covered

- Temporary employees (*Still managed by supervisors — just outside this policy's framework*)
- Contractors (*Same as above*)
- UNC employees (*Follow the University SHRA Performance Appraisal Policy*)

Not sure if you're covered? Ask your agency HR team.

Everyone Has a Role — Including You

Performance management is a shared responsibility. Here's what the policy expects from each level.

OSHR	Your Agency	Your Supervisor	You
◦ Sets the policy and standards ◦ Provides training & resources ◦ Reviews agency compliance	◦ Designates a PM Coordinator ◦ Facilitates calibration ◦ Maintains a recognition program	◦ Sets goals with you collaboratively ◦ Provides ongoing feedback ◦ Completes your annual review	◦ Take an active role in your goals ◦ Ask for feedback when you need it ◦ Invest in your own development

Growth mindset: this process works best when everyone — including you — shows up to it.

The Three Phases of the Annual Work Cycle

Every covered employee goes through the same three phases each year.

Phase 1: Preparation & Planning

July (FY) / Jan (Calendar)

- Set 3–5 goals collaboratively
- Select 2–7 agency values
- Work plan must be in place within 45 days of cycle launch
- Employee signs = receipt, not agreement

Phase 2: Continuous Feedback

All year

- Ongoing Check-Ins throughout the year
- Focus on: What's going well, what to work on, how to grow
- You can request a Check-In if 30+ days have passed
- Required for new hires & certain employees

Phase 3: Annual Progress Review

June 30 (FY) / Dec 31 (Calendar)

- Review performance against goals and values
- Answer 3 questions: goals, values, growth
- Calibration happens first
- Ratings assigned and shared with employee

Work Cycle Options — Know Which One Your Agency Uses

Both cycles follow the same three phases • Your agency chooses one and applies it consistently • Check with your HR team if you're unsure

Fiscal Year Cycle

July 1 → June 30

Work plans set in July

Check-Ins are completed throughout the year

APR completed by June 30

If your agency runs a fiscal year cycle, your new FY 2026–27 work plan should be in place now.

[Agency Cycle Timelines](#)

Calendar Year Cycle

January 1 → December 31

Work plans set in January

Check-Ins are completed throughout the year

APR completed by December 31

If your agency runs a calendar-year cycle, you're in the feedback phase now — mid-year Check-Ins should be happening.

Key Changes

Growth & Development Built Into Your Work Plan

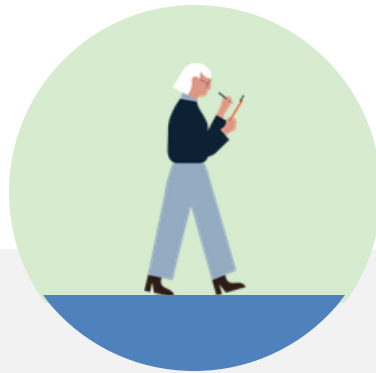
The new policy encourages every employee to include a growth and development goal in their annual work plan. You and your supervisor define the goal together.

- 1 **Pursue a certification or a training program**
- 2 **Take on a stretch assignment or new responsibility**
- 3 **Explore a different unit functional area**
- 4 **Build a skill you've wanted to develop**



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Skills Based Learning

- Business Skills
 - Leadership & management
 - Professional development
 - Business software tools
- Functional Skills
 - Project management
 - Marketing
 - HR, Recruiting & L&D
- Technology Skills
 - Artificial Intelligence
 - Software development
 - Cybersecurity



Professional Certifications

- Certification Preparation
- Practice exams
- Continuing Education (CEU)
- SHRM
- PMI
- NASBA



AI Role Play

- Prepare for difficult conversations in a safe environment
- 600+ curated role plays both standalone and integrated into courses
- Tied to learning objectives and reviewed by instructional designers before publication

Regular Check-Ins Replace the Interim Review

Check-Ins focus on: What's going well • What to work on • How to grow

Before

- One mid-year interim review
- Annual end-of-year evaluation
- Feedback mostly at set checkpoints
- Employee waits for supervisor to initiate

Now

- Ongoing Check-Ins throughout the year
- Annual review still happens
- Real time feedback
- Employees can request a Check-In

Check-In Feature in Cornerstone

The tool that makes the feedback culture real.

Every Check-In you complete is a building block for your annual review and your professional growth.

Initiate: Either the supervisor or employee can start a Check-In at any time. Log in to NC Learning Center, hover over Performance > select Check-Ins.

Document: Answer the guiding questions asked in the selected template. You and your manager can comment collaboratively and individually.

Request: If you request a Check-In and more than 30 days have passed since your last Check-In, your manager must schedule it.

Reference: Goals can be reviewed from within Check-Ins, and Check-Ins can be accessed from inside Annual Progress Review task.

Check-In Templates

Check-In templates are available when creating a Check-In.

They each have different guiding questions to help facilitate conversations.

1

Feedback Check-In: Helps employees and supervisors stay connected to employee performance goals, ensures meaningful, timely feedback and creates space to remove barriers, and improve overall effectiveness.

2

Growth and Development Check-In: Helps with setting professional development goals, exploring skill-building options, assessing their current progress, and identifying clear next steps to improve in their current role or advance their careers.

3

New Employee Check-In: Helps ensure new employees stay on track and get the support they need as they learn and grow in their new role.

4

Performance Improvement Check-In: Helps supervisors who need to have a direct conversation with an employee about a specific concern and work collaboratively on a clear plan for improvement.

5

Transfer or Separation Check-In: This discussion guide helps employees and managers review and document an employee's performance during the current cycle, before the employee transfers or separates from their position.

How to request a Check-In with your manager

- Access the NC Learning Center through HR Payroll System –Fiori.
- Navigate to Performance > Check-Ins
- Select “Get Started”



Performance Ratings: Updated Names & Two New Options

Your agency uses one overall rating OR rates each goal and value individually.

Ask your HR team which model applies.



3

Outstanding Performer: Consistently exceeds expectations on ALL goals and values throughout the entire cycle.

2

Successful Performer: Successfully meets expectations. This is the expected rating for a fully performing employee. A "2" is not a mediocre rating, it means you're doing your job well.

1

Needs Improvement: Does not yet meet expectations in one or more areas. Requires documented feedback and a real opportunity to improve before discipline can follow.

U

Unavailable To Evaluate: Employee was on leave at the time of the APR. If you were on extended leave, your supervisor cannot evaluate performance that did not occur. Not a negative rating.

T

Insufficient Time: Employee was in the role for fewer than 90 calendar days at cycle end. Applies to new hires and transfers. Not a negative rating.

Annual Review: Three Questions

The end-of-year review now centers on three consistent questions.

1

How did you perform against your goals? Were the goals in your work plan met? What did your performance look like across each one?

2

How did you demonstrate your agency's values? Values are selected at the start of the cycle. How did your work and behavior reflect those values throughout the year?

3

How can you continue to grow? Development can be a part of every performance conversation, not an afterthought. Your growth plan lives here.

Resources For You!



1

OSHR Performance Management Webpage:

Policy text, supervisor and employee pages, training courses, goal-setting template, agency cycle timelines.

2

Training Courses – NC Learning Center:

Intro for employees. Supervisor training. Calibration training for managers.

3

Managing Employee Work Policy: Available on the OSHR website.

4

LinkedIn Learning: Access thousands of best-in-class courses, trainings, and certifications to gain business, functional, and technical skills.

Questions?

Working for You webinars continue throughout the year!

Thank you!