

# QUARTERLY CONVERSATIONS

Managing employees' performance is one of a supervisor's most important responsibilities, and providing ongoing feedback is crucial to doing that well. These conversations should not only provide feedback on how an employee is doing at that time. They should also cover any new projects, changes in work priorities, and difficulties the employee is encountering that may impact the performance expectations.

In support of these guiding principles, Departmental Regulation [4040.430](#), *Employee Performance and Awards*, requires Rating Officials to have at least one formal conversation with each employee to review performance "no less frequently than once each quarter."

The Department does not specify an amount of time an employee must be under a Rating Official to receive a quarterly conversation. As a rule of thumb, each employee must receive at least one review each quarter. You may ask, "What if I only supervise the employee one day that quarter?" A few weeks can be considered enough time to have a performance conversation, even if it consists of the employee bringing the new supervisor up to speed and making sure they're both on the same page as to what the employee's priorities.

The following charts were developed to assist Rating Officials with timeframes for conducting quarterly conversations. Rating Officials can also use the attached "Performance-Based Conversations" as a reference guide for holding performance discussions.

Timeframes for Conducting Required Quarterly Conversations for In-Plant Rating Officials	
Quarterly Timeframe	Completion Opportunity - Q1 through Q4 Conversations
October 1 through December 31	The completion of the performance plan for the upcoming appraisal cycle will serve as the first quarterly conversation.
* January 1 through March 31	Utilize the first IPPS assessment as an opportunity to conduct the second quarterly conversation.
* April 1 through June 30	Utilize the former third quarter progress review period as an opportunity to conduct the third quarterly conversation.
* July 1 through September 30	Utilize the second IPPS assessment as an opportunity to conduct the fourth quarterly conversation without discussing the final rating.

Timeframes for Conducting Required Quarterly Conversations for Non In-Plant Rating Officials	
Quarterly Timeframe	Completion Opportunity - Q1 through Q4 Conversations
October 1 through December 31	The completion of the performance plan for the upcoming appraisal cycle will serve as the first quarterly conversation.
* January 1 through March 31	At the Rating Official's discretion during this time period, conduct the second quarterly conversation.
* April 1 through June 30	At the Rating Official's discretion during this time period, conduct the third quarterly conversation.
* July 1 through September 30	At the Rating Official's discretion during this time period, conduct the fourth quarterly conversation without discussing the final rating.

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\* Quarterly conversations can also be accomplished in these ways:

- When performance plans are set outside of October 1 through 30 (ex – for a new employee). The date the plan is set is also considered the quarterly conversation.
- When advisory assessments or interim ratings occur before the end of the rating cycle (ex – employee receives a new supervisor). The appraisal delivery date is also considered the quarterly conversation.
- For In-Plant Rating Officials, any additional meetings scheduled with the employee to discuss performance-related issues can suffice as the quarterly conversation if one has not already taken place during that quarter.

Please email the Performance Management Team at [PerformanceManagement@usda.gov](mailto:PerformanceManagement@usda.gov) with any questions.