Foreign Service
Quarterly Conversation Record (QCR)
for Employees and Supervisors

(Does NOT go in the employee's personnel file or to the promotion board.)

Authority: 22 U.S.C. Ch. 52, Foreign Service.

Purpose: This form is used to establish and update objectives, expectations, priorities, and documenting quarterly check-ins for employees.

Routine Uses: The personal information will not be disclosed outside the Agency without written consent of the employee concerned, except as appropriate under any applicable routine use in the Privacy Act or in the system of records notice USAID-1 Foreign Service Personnel Records.

Disclosure: Disclosure is voluntary; however failure to disclose the requested information may result in not documenting or identifying performance expectations or if there is a specific need to improve skills relative to the standards for an employee's grade.

System of Records Notice: USAID-1 Foreign Service Personnel Records, 80 FR 11387, April 2, 2015.

Keep this form secured in a locked filing cabinet. If stored electronically, ensure the folder has proper access controls. Use a cover sheet before faxing this document, and ensure you encrypt it using USAID-approved encryption methods before emailing it.

Section 1 – Employee Information

Name:		
Personal Grade:	Primary Backstop:	Position Backstop:
Start Date: *(April 1, or assignment start date)*	End Date: *(March 31, or close out date for assignment)*	

Section 2 – Objectives

Objectives: Record at least one skill development objective and one or two work-related objectives that the employee is expected to accomplish during the performance cycle.

Signatures: Objectives may be set in the first quarter or at the start of a new assignment. Enter and confirm the conversation date in the appropriate quarter to indicate that an objectives and expectation setting conversation occurred and objectives were established.

Section 3 – Quarterly Conversations

Q1: April – June (Objectives & Expectation Setting Conversation)   Due NLT June 30

Short-Term Priorities, Goals, Expectations *Use this space to take notes on where to focus efforts, specific actions or tasks, key interim targets that need to be achieved in support of overarching objectives, etc.*	**Notes on challenges, resources needed, etc.**

Date of conversation: _____   Employee confirmed   Supervisor confirmed

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Q2: July – September   Due NLT September 30

Updates to Priorities, Goals, Objectives, Expectations	**Notes on progress and challenges discussed during quarterly conversation** *Topics may include: work performance, skills feedback, professional development, challenges faced, resources needed, or other topics*

Date of conversation: _____   Employee confirmed   Supervisor confirmed

Q3: October – December	Due NLT December 31
Updates to Priorities, Goals, Objectives, Expectations	**Notes on progress and challenges discussed during quarterly conversation** *Topics may include: work performance, skills feedback, professional development, challenges faced, resources needed, or other topics*

Date of conversation: _____   Employee confirmed   Supervisor confirmed

Annual Review Conversation (Q4 or beginning of Q1)	Due NLT April 30
Notes on performance against work objectives and expectations during the performance cycle	**Notes on progress and challenges discussed during quarterly conversation** *Topics may include: work performance, skills feedback, professional development, challenges faced, resources needed, or other topics*

Signatures

Note: Signatures acknowledging the Annual Review Conversation took place and documenting the Annual Performance Evaluation are documented on the *Foreign Service Annual Performance Evaluation* form that is submitted for inclusion in the employee's personnel file.

Instructions for Quarterly Conversation Record

Section 1 – Employee Information

The demographic information in Section 1 will be pre-populated in ePerformance from personnel databases. If any information is incorrect, follow instructions in ePerformance to make or request corrections.

1. **Name:** Employee's name
2. **Personal Grade:** Employee's current grade (e.g., FS-03).
3. **Primary Backstop:** Employee's primary 2-digit Foreign Service Backstop code (e.g., BS-02, BS-11, BS-85). These codes correlate with Foreign Service positions (e.g. Program Officer, Economist, Legal Officer) and are usually the backstop in which the employee was hired and tenured.
4. **Position Backstop:** The 2-digit Foreign Service Backstop code for the current position.
5. **Start Date and End Date (MM/DD/YYYY):** The Employee Performance and Development (EP&D) Quarterly Conversation Record is to be used throughout the performance cycle for establishing and updating objectives, expectations, priorities, and documenting quarterly check-ins. The performance period entered on the form is based on the performance cycle, with a typical start date of April 1. The typical end date is March 31.

   If there is a change in the employee's assignment or supervisor during the course of the performance cycle, the Quarterly Conversation Record should be completed and signed by the employee and rating official before the change in assignment or supervisor occurs. In this case, the performance period end date will be the last day of the employee's assignment or last day under the current supervisor. A new form should be started by the employee and supervisor within 30 days of the new assignment or change in supervisor. In this case, the performance period start date will be the date the employee arrives at the new assignment or receives a new supervisor. Employees in long-term training, language training, and non-USAID assignments are not required to complete the Quarterly Conversation Record.

Section 2 – Objectives (established in Quarter 1 or start of a new assignment)

- At the beginning of the performance period, the employee and supervisor should meet to have an expectation setting and development conversation. The supervisor and employee should work together to develop objectives for the employee to work toward during the performance period. Either the employee or supervisor may enter the agreed upon objectives in this section.

- There is flexibility in the number of objectives set, but no more than two work-related objectives are recommended. The supervisor and employee should agree on what makes sense based on the nature of the work and the context in which the work is performed. For example, some FSOs will have relatively stable work or projects that lend themselves to annual objectives. Others may only be able to identify one annual, concrete work-related objective and a number of shorter-term priorities that will be completed at the beginning of the year, after which new priorities will be set. It is required that at least one skill development objective is set for the employee to focus on throughout the performance period. A skill development objective establishes what an employee will do to further develop one or more FS skills or backstop competencies relevant to his/her current role or to his/her career goals.

- Note that this document does not go to the Promotion Board; you should not craft your objective for an audience beyond your supervisor. Additional guidance for writing objectives is provided in the Employee EP&D Guidebook and Supervisor EP&D Guidebook.

Section 3 – Quarterly Conversations

- All employees are expected to meet expectations established for their roles, expectations established with the supervisor throughout the performance cycle with respect to specific work assignment responsibilities, and expectations based on backstop competencies and the skill standards established for his/her grade in the FS/SFS Skills Framework.

- Section 3 should be used by the employee and supervisor throughout the performance cycle to document, clarify, and update priorities, short-term goals, objectives, and expectations. These items may be entered by the supervisor or the employee in the left column, but both should agree on the content that is entered.

- In Q1, the employee and supervisor will have an objectives and expectation setting conversation. Work and skill objectives that are established are documented in Section 2. Shorter term priorities/expectations should be documented in the space provided under the Q1 conversation heading (left column) and notes related to specific challenges, resources needed, etc. may also be recorded (right column). This is optional, but may help employees and supervisors clarify expectations and remember details that can later be incorporated into narratives for the Annual Accomplishment Record (AAR) or Promotion Input Form (PIF).

- All employees and their supervisor are expected to have at least one check-in during the second and third quarters of the year during which they discuss one or more topics such as work performance against expectations, skill development, and challenges faced, resources needed, accomplishments, etc. After the conversation, a summary of what was discussed should be documented in the right column. There are no specific requirements for how much of the conversation is documented; the employee and supervisor may use this space as they see fit for tracking progress, accomplishments, and noting development areas over time. However, if an employee is not meeting expectations or there is a specific need to improve skills relative to the standards for his/her grade, it is highly recommended that the supervisor documents specific ways an employee should work to improve in order to facilitate clear expectation setting and communication about performance improvement needs.

- The quarterly conversation needs to occur and be documented at least one time during the second and third quarters of the calendar year. There is no specific timeframe within the quarter that these conversations need to occur. For example, if a project ends toward the beginning of a quarter and the employee and supervisor discuss how the project went and then discuss upcoming priorities and expectations for the employee's next project, that conversation can be documented as the quarterly conversation. For additional explanation, please see the Employee EP&D Guidebook and Supervisor EP&D Guidebook.

- The employee and supervisor must enter and confirm the date the conversation took place each quarter.

- In Q4, or by April 30 of the following year, the employee and supervisor must have an Annual Review Conversation. The QCR provides a place to take notes during Q4 regarding employee's performance during the cycle and notes on what the employee may build on in the next performance cycle. The FS Annual Performance Evaluation is the rating of record and is included in the employee's personnel file, whereas the Quarterly Conversation Record is not.