

K-State Research and Extension Annual Agent Performance Review

Objectives of the Performance Review Process

1. Provide opportunity for self-assessment.
2. Increase job understanding and satisfaction.
3. Recognize areas in which performance consistently meets or exceeds expectations.
4. Establish any areas where development is needed.
5. Provide an opportunity to plan for professional growth.

In partnership with the area extension director*, assessment of agent effectiveness is one of the most important responsibilities of the local board. Assessment is an ongoing process that continues during the program year through board meetings and quarterly impact reports. It culminates in the annual performance review between October and February.

Directions for the Agent Performance Review Process

The extension agent will provide the following documents to the area director* and board members:

- _____ Current year's Action Plan
- _____ Extension Agent Performance Review Form (with examples of impacts)
- _____ Annual Accomplishment Report
- _____ Professional Development Plan (Include experiences that will strengthen core competencies as well as support the primary area of program focus.)
- _____ Next year's Action Plan

The External Feedback form is an optional component of the agent performance review. Extension agents may identify a group of individuals who are familiar with the local impact of their program and who do not serve on the extension board. (Examples: Program Development Committee, Master Gardeners, or 4-H club leaders.) The agent may send the form to those individuals at any time during the year. Completed feedback forms are to be sent to the area director* and will be considered by the director in the summary of the agent's performance.

A timeline for implementation of the agent performance review process is attached.

In this process, the agent's effectiveness is evaluated in five categories:

- 1) Program Planning, Implementation, Reporting and Evaluation
- 2) Professionalism and Self-Management
- 3) Volunteer and Staff Development
- 4) Interpersonal and Communication Skills
- 5) Administrative and Management Skills

*In counties or districts with five or more agents (or four agents if this model is adopted by the board and area director) the responsibility for evaluating agents' work performance is delegated by the area director and local board to the county or district director.

County Timeline

Ongoing:

Agent Reports – Agents will provide board members with quarterly impact reports based on their action plans.

Concerns – Any programming or performance concerns should be addressed during monthly board meetings – not introduced during the performance review process.

External Feedback – External audiences or partners of extension programs may be identified and feedback forms distributed during the program year to provide feedback for the final review process. Completed External Feedback forms are to be sent to the area extension director.*

February or March

Board Meeting – Board members should be oriented to their role in the agent’s performance review process. The “Agent Performance Review Module” on the Board Leadership site is recommended for use in this orientation. (www.oznet.ksu.edu/boardleadership)

September through November

Preparation – Agents provide the board members and area director* with the following documents:

- Current year’s Action Plan
- Extension Agent Performance Review Form, on which the agent has provided specific examples of impacts made in each area
- Annual Accomplishment Report
- Professional Development Plan
- Next year’s Action Plan

Performance Review – Board members add their comments to each section and forward to the area director.*

Performance Review Summary – The area director* will complete the Performance Review Summary.

October through February

Evaluations – The area director,* board chair and agent will meet to review the Extension Agent Performance Review Form, Summary and Professional Development Plan. Any follow-up actions will be documented, listing specific concerns, methods to address the concerns and date by which further action will be taken.

Signatures – The area director,* board chair and agent will sign and date the form. The area director and agent will each receive a copy.

Executive Session – The board chair, or county or area director, will provide the board members with an oral summary of the review form that was provided to the agent.

District Timeline

Ongoing:

Agent Reports – Agents will provide board members with quarterly impact reports based on their action plans.

Concerns – Any programming or performance concerns should be addressed during scheduled board meetings – not introduced during the performance review process.

External Feedback Forms – External audiences or partners of extension programs may be identified and feedback forms distributed during the program year to provide feedback for the final review process. Completed External Feedback forms are to be sent to the area extension director.*

May or June

Board Meeting – Board members should be oriented to their role in the agent’s performance review process. The “Agent Performance Review Module” on the Board Leadership site is recommended for use in this orientation. (www.oznet.ksu.edu/boardleadership)

September through November

Preparation – Agents provide the board members and area director* with the following documents:

- Current year’s Action Plan
- Extension Agent Performance Review Form, on which the agent has provided specific examples of impacts made in each area
- Annual Accomplishment Report
- Professional Development Plan
- Next year’s Action Plan

Performance Review – Board members will add their comments to each section and forward to the area director.*

Performance Review Summary – The area director* will complete the Performance Review Summary.

October through February

Evaluations – The area director,* board chair and agent will meet to review the Extension Agent Performance Review Form, Summary and Professional Development Plan. Any follow-up actions will be documented, listing specific concerns, methods to address the concerns and date by which further action will be taken.

Signatures – The area director,* board chair and agent will sign and date the form. The area director and agent will each receive a copy.

Executive Session – The board chair, or district or area director, will provide the board members with an oral summary of the review form that was provided to the agent.

*In counties or districts with five or more agents (or four agents if this model is adopted by the board and area director) the responsibility for evaluating agents’ work performance is delegated by the area director and local board to the county or district director.

CONFIDENTIAL DOCUMENT

Extension Agent Performance Review Form

Name _____

Date _____ County/District _____

Instructions:

Following are the criteria for assessing extension agent effectiveness. In preparation for the performance review process:

- Agents will provide specific examples of impacts made during the current program year (October 1 – September 30) toward at least three of the indicators in each section.
- Board members will then individually add their comments regarding the agent's performance, ability and competency in each area.
- Board members will forward their comments to the area director.*
- The area director* will summarize the board's comments and complete the Performance Review Summary.

Performance reviews are confidential documents that are not to be viewed by or discussed with anyone other than the agent, board members and area director.*

*In counties or districts with five or more agents (or four agents if this model is adopted by the board and area director) the responsibility for evaluating agents' work performance is delegated by the area director and local board to the county or district director.

1) Program Planning, Implementation, Reporting and Evaluation Indicators

- a) **Subject Matter Proficiency** – Possesses subject matter proficiency related to job responsibility
- b) **Program Need Identification** – Works with program development committees to assess local needs and identify major educational priorities related to K-State Research and Extension core mission themes
- c) **Underserved Audiences** – Identifies underserved audiences and develops and implements a plan to reach them
- d) **Collaborative Relationships** – Collaborates with relevant organizations to plan and implement educational programming
- e) **Program Development and Implementation** – Implements educational programming with an identifiable, deliberate sequence of planned activities through which clientele gain knowledge, acquire skills, make decisions and change behaviors
- f) **Teaching Skills** – Demonstrates teaching skills by serving as a presenter of information
- g) **Use of Technology** – Uses appropriate technology in program delivery
- h) **Evaluation of Impact** – Develops and implements a system for evaluating impact of several major educational programming efforts
- i) **Communication of Impact** – Communicates impact of educational programming through quarterly impact reports

Agent's examples:

Agent: Give specific examples of impacts made during the current program year (October 1 – September 30) toward at least three of the above indicators.

Board member's comments:

2) Professionalism and Self-Management Indicators

- a) **Enhances the Image of K-State Research and Extension** – Represents K-State Research and Extension in a manner that reflects well on the agent and on all other employees of the organization
- b) **Loyalty to K-State Research and Extension** – Demonstrates commitment to the comprehensive mission of K-State Research and Extension
- c) **Customer Service** – Provides effective customer service
- d) **Service to K-State Research and Extension** – Contributes to K-State Research and Extension by serving as a mentor or as a leader or member of professional organizations, task forces, committees, etc.
- e) **Professional Development** – Has identified and participated in a Program Focus Team and has enhanced professional knowledge through participation in professional development opportunities
- f) **Dependability** – Completes assignments on time and follows through with commitments
- g) **Work Schedule** – Practices professional scheduling in order to achieve the responsibilities of the position while balancing professional and personal responsibilities
- h) **Work Ethic** – Makes effective use of work time and demonstrates ethical behavior
- i) **Poise and Composure** – Maintains poise and composure in stressful situations
- j) **Initiative** – Identifies and pursues opportunities; shows willingness to take risks

Agent's examples:

Agent: Give specific examples of impacts made during the current program year (October 1 – September 30) toward at least three of the above indicators.

Board member's comments:

3) Volunteer and Staff (Office Professional and Program Assistant) Development Indicators

- a) **Identification and Selection** – Implements and manages a comprehensive process for selecting and screening volunteers and staff, following K-State Research and Extension policies and procedures
- b) **Orientation** – Provides orientation to equip volunteers and staff
- c) **Training** – Provides ongoing training to enhance skills of volunteers and staff
- d) **Leadership by Volunteers** – Encourages volunteers to take leadership roles within the local program
- e) **Evaluation** – Evaluates and provides feedback to enhance performance of volunteers and staff
- f) **Recognition** – Recognizes and rewards volunteer and staff performance

Agent's examples:

Agent: Give specific examples of impacts made during the current program year (October 1 – September 30) toward at least three of the above indicators.

Board member's comments:

4) Interpersonal and Communication Skill Indicators

- a) **Teamwork** – Recognizes the value of teamwork, works well with others, and values and respects team relationships
- b) **Verbal Communication** – Articulates thoughts clearly
- c) **Listening Skills** – Listens and responds appropriately
- d) **Written Communication Skills** – Communicates clearly, accurately and thoroughly
- e) **Marketing** – Actively markets and promotes local office and educational programming
- f) **Public Relations** – Ensures that the local extension program is well-known and respected in the community

Agent's examples:

Agent: Give specific examples of impacts made during the current program year (October 1 – September 30) toward at least three of the above indicators.

Board member's comments:

5) Administrative and Management Skill Indicators (For All County or District Directors)

- a) **Works with Local Extension Board** – Works with local extension board as they partner with the area director to administer the local extension program
- b) **Budget and Finance** – Provides leadership in developing budgets, securing extramural funding, supervising fiscal operations and expenditures, submitting financial reports, and reviewing audits
- c) **Legal Responsibilities** – Provides oversight to legal responsibilities of local extension elections, annual meetings and legal responsibilities of extension councils or districts
- d) **Supervision of Local Staff** – Supervises, coaches and evaluates office professionals and program assistants
- e) **Supervision of Agents** (in local offices with five or more agents or units with four agents adopting this responsibility) – Supervises, coaches and evaluates agents
- f) **Delivery of Comprehensive Local Program** – Works with other agent(s), board members, area director, volunteers and others to develop and deliver a comprehensive local educational program
- g) **Underserved Audiences** – Provides leadership in identifying underserved audiences and developing and implementing a plan to reach them

Agent's examples:

Agent: Give specific examples of impacts made during the current program year (October 1 – September 30) toward at least three of the above indicators.

Board member's comments:

Board Member's Signature _____ **Date** _____