

County Extension Agent

_____ Name

PERFORMANCE REVIEW

_____ County

Instructions and General Guidelines

- The County Extension Coordinator (CEC), will meet with the agent in advance (one year prior to the performance review, whenever possible) to establish consensus on specific criteria to be evaluated and assign weights to each competency. The CEC will consult with the District Extension Director (DED) for approval of assigned weights and proficiency criteria. Weights may be assigned based on the following ranges:

Programming:	20 – 50%
Professionalism & Organizational Requirements	20 – 30%
Marketing & Community Involvement:	10 – 25%
Professional Development:	5 – 20%
Resource Generation & Management:	5 – 35%

Total weight must equal 100%

- The CEC is responsible for compiling any necessary support data, completing the competency-based evaluation form and reviewing it with the DED prior to conducting the annual performance review with the agent. The CEC will forward the completed and signed document to the DED.
- The agent must fulfill lower level proficiencies before receiving a higher level rating.
- Only one proficiency level can be selected for each indicator. Select by marking the small box in the lower right corner of each proficiency level.
- If a proficiency level has more than one component, all criteria must be met.
- If any indicator is justifiably not applicable (as is the case with some Program Specialists), select proficiency level III and mark as “NA”.
- The evaluation rating may be amended if the agent or the CEC presents supporting documentation. An appeal to the DED may be initiated within 30 days after the review is conducted.
- Scoring: Each proficiency level represents a numeric equivalent (i.e., Level I = 1 point; Level II = 2 points; Level III = 3 points; Level IV = 4 points; and level V = 5 points). Points are summed for each competency and a weighted score is computed using the formula below. (A sample is provided in italic print.)

Competency	Attained Score	÷	Desired Score*	=	Dividend	x	Weight	=	Weighted Score
Programming	<i>16</i>	÷	18	=	<i>.89</i>	x	<i>.40</i>	=	<i>.36</i>
Professionalism & Org. Req'mts	<i>25</i>	÷	30	=	<i>.83</i>	x	<i>.25</i>	=	<i>.21</i>
Marketing & Commun. Involvement	<i>14</i>	÷	15	=	<i>.93</i>	x	<i>.15</i>	=	<i>.14</i>
Professional Development	<i>18</i>	÷	18	=	<i>1.00</i>	x	<i>.10</i>	=	<i>.10</i>
Resource Gen. & Management	<i>11</i>	÷	9	=	<i>1.22</i>	x	<i>.10</i>	=	<i>.12</i>
					TOTAL SCORE			=	<i>.93</i> <i>(or 93%)</i>

* Desired score is the maximum point value attained if all Level III proficiencies for the competency are met. Level III proficiencies reflect the expectations all agents should meet.

Description/Definition The ability to plan, design, implement, evaluate and account for significant Extension education programs that improve the quality of life for our clientele.

INSTRUCTIONS: Mark the proficiency level attained for each indicator. Assign points to the proficiency levels as defined in the “Instructions and General Guidelines”. Total the points and record the score under *Attained Score* for the *Programming* competency on the “Scoring Summary”.

Indicators	Proficiencies				
	Level I	Level II	Level III	Level IV	Level V
Needs Assessment	Does not conduct needs assessment (including advisory committee) to identify current and emerging community needs	Aware of “traditional” issues/needs of a small portion of clientele &/or conducts needs assessment (including advisory committee) less frequently than annual	Conducts needs assessment (including advisory committee) to identify current and emerging community needs at least annually	Involves new, non-traditional clients in needs identification	Identifies probable causes of emerging issues/needs
Implementation of Programs to Address Issues Identified through Needs Assessment	Does not address issues identified through needs assessment – or – shows little or no documented impact	Addresses 1 critical issue and documents impact	Addresses 2-3 critical issues affecting clientele that include multiple components (or as agreed on)	Identifies critical issues and demonstrates impact	Leads work groups in addressing critical issues
Provides educational programs as identified in plan of work	Does not follow plan of work	Provides ___ or fewer standard programs or presentations	Provides __ standard programs or presentations	Provides more than __ standard programs or presentations	Assists others in providing educational programs related to their plan of work
Teaching and Learning Methods	Is unaware of or fails to use teaching technologies/methods to accommodate different learning styles for program dissemination	Makes limited use of current teaching technologies/methods to accommodate different learning styles for program dissemination	Is aware of and uses current teaching technologies/methods to accommodate different learning styles for program dissemination	Selects and incorporates specific teaching methods to accommodate different learning styles. Monitors effectiveness of teaching methods and adjusts as appropriate	Demonstrates, formally shares or trains others to use/select teaching methods to accommodate different learning styles

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Programming continued

Indicators	Proficiencies				
	Level I	Level II	Level III	Level IV	Level V
Evaluation & Impact	Does not evaluate programs -&/or- No outcomes or impacts reported	Has an inadequate plan for evaluation -&/or- Outcomes and impacts from individual work may be reported but show minimal evidence of accomplishment	Evaluation strategies are planned and executed. Results are summarized -&/or- Outcomes and impacts from individual work are evident in reports and reflect accomplishment or progress toward goals	Elicits evaluation responses from representative sample of targeted audience, and develops strategies for analyzing long-term program impact/outcomes -&/or- Outcomes and impacts from individual work indicate significant practice &/or behavioral change with at least one client group	Accurately interprets evaluation results to strengthen future Extension programs -&/or- Outcomes and impacts from individual work indicate significant changes or accomplishment beyond the local level
Reporting of Program Results (e.g., Staff Activity Reports, GA Counts, Time & Effort, Farm Gate, ES237, 4-H Curriculum, crop/weather report, etc.)	Does not complete and/or submit impact reports Does not complete and/or submit GA Counts data	Submits impact reports that are late, not prepared according to instructions and/or inaccurate Submits GA Counts data that is inaccurate and/or late	Submits complete and accurate impact reports on time that are prepared according to instructions. Responds to requests for unplanned reports and specialized information on a timely basis Submits accurate GA Counts data by the 10 th day of following month	Provides supplemental explanation or documentation useful in evaluating and improving educational programs Provides analyses based on GA Counts data	Impacts and resulting outcomes are published and shared Coaches others on use of GA Counts system to provide useful analyses

Comments: _____

Description/Definition The demonstration of behaviors that reflect high levels of performance, a strong work ethic, and a commitment to the mission, vision, and goals of Extension. The ability to successfully interact with individuals and groups. The ability to establish structure, organize process, and develop and monitor resources to obtain educational outcomes effectively and efficiently.

INSTRUCTIONS: Mark the proficiency level attained for each indicator. Assign points to the proficiency levels as defined in the “Instructions and General Guidelines”. Total the points and record score under *Attained Score* for the *Professionalism & Organizational Requirements* competency on the “Scoring Summary”.

Indicators	Proficiencies				
	Level I	Level II	Level III	Level IV	Level V
Response to clients' needs/requests	Does not respond to clients <input type="checkbox"/>	Does not respond within 36 hours, as documented ___ times during the year <input type="checkbox"/>	Responds to clients within 24-36 hours, except when absent from office for extended period <input type="checkbox"/>	Responds in less than 24 hours, except when absent for extended period <input type="checkbox"/>	Utilized innovative methods to respond <input type="checkbox"/>
Professional Appearance	Does not dress appropriately for the occasion <input type="checkbox"/>	Does not dress appropriately as documented more than ___ times per year <input type="checkbox"/>	Dresses appropriately and is neat and well groomed for the occasion <input type="checkbox"/>	Models & mentors others regarding professional dress <input type="checkbox"/>	/
Attitude	After counseling, makes no attempt to improve human relations skills <input type="checkbox"/>	Relationships within office &/or with clientele are difficult due to poor human relations skills <input type="checkbox"/>	Works cooperatively within office &/or with clientele <input type="checkbox"/>	Goes beyond the “usual” to willingly share and help others <input type="checkbox"/>	Coaches others in office using teamwork skills with positive results <input type="checkbox"/>
Teamwork	Does not contribute to team effort <input type="checkbox"/>	Contributions to team do not meet expectations of team members. Tends to let others carry more than an equitable workload <input type="checkbox"/>	Contributions to team meet expectations. Individual carries his/her personal share of the work load <input type="checkbox"/>	Has taken on specific extra team work load (county, cluster, regional, state, multidiscipline, etc.) that is beyond team expectations <input type="checkbox"/>	Has served a major role in regional, state or national team & individual contribution has been recognized as outstanding <input type="checkbox"/>
Dependability	After counseling, continues to break commitments &/or does not deliver on commitments within established time frame <input type="checkbox"/>	Does not deliver on commitments in a timely manner as documented ___ times during the year <input type="checkbox"/>	Follows through on commitments within the established time frame <input type="checkbox"/>	/	/

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Professionalism and Organizational Requirements continued

Indicators	Proficiencies				
	Level I	Level II	Level III	Level IV	Level V
Time management	Does not follow professional scheduling guidelines	Knows and follows professional scheduling guidelines	Shows ability to manage multiple tasks	Teaches others on effective time management principles	/
Attendance & Punctuality including staff conferences and called meetings	Is absent more than ___ days &/or late more than ___ days. Is absent &/or late to scheduled meetings more than ___ times	Is absent more than ___ days &/or late more than ___ days but provides approved excuses. Is absent &/or late to scheduled meetings more than ___ times	Attends work daily and is prompt, except under extraordinary circumstances approved by supervisor. Attends staff conferences and called meetings except when excused.	/	/
Office/Work Environment Appearance	Does not maintain office/work areas in accordance with established standards	/	Office and work areas appear neat, well organized, and clean	/	/
EEO/Civil Rights/Affirmative Action and ADA Requirements	Does not follow ADA and EEO/CR/AA guidelines	Fails to follow established guidelines as documented more than ___ times per year	Follows all EEO/CR/AA and ADA guidelines. Includes required statements on newsletter and other media	Establishes advanced communication about EEO/CR/AA and ADA at staff meetings	Repeatedly strives to reach diverse &/or non-traditional clientele
Fiscal Responsibility (e.g., vouchers, receipts, county grants)	Does not follow established financial guidelines	Does not follow guidelines more than ___ times per year &/or does not follow complete guidelines	Follows all financial guidelines as fully defined	Assists others in following/understanding financial guidelines	Participates in forming financial guidelines or policies

Comments: _____

Description/Definition The ability to transfer & receive information effectively through media; legislative contacts; communication with constituents, elected officials and Extension professionals; and other methods. Involvement in community efforts that promote Extension visibility.

INSTRUCTIONS: Mark the proficiency level attained for each indicator. Assign points to the proficiency levels as defined in the “Instructions and General Guidelines”. Total the points and record score under *Attained Score* for the *Marketing and Community Involvement* competency on the “Scoring Summary”.

Indicators	Proficiencies				
	Level I	Level II	Level III	Level IV	Level V
Involvement in county marketing plan	Agent does not participate in development of county marketing plan	Agent recommends, submits or implements marketing activities related to content area and/or individual programs.	Agent participates in development of county marketing plan beyond the scope of the content area and/or individual programs	Agent successfully implements a new aspect of the county marketing plan	Agent successfully implements an innovative, non-traditional approach to the county marketing plan
Marketing of individual program area	Does not understand the program target market	Understands the target audience but does not develop a marketing plan to reach it effectively	Clearly understands program clientele and designs a marketing strategy to effectively reach the audience	Involves target audience in developing and implementing plans for informing others	Evaluates effectiveness of marketing strategy and makes changes to better communicate message to target audience
Media Use	Does not use media to enhance Extension efforts	Uses media on a limited basis	Uses appropriate communication methods to educate and inform clients	Has been recognized for quality media efforts	Uses new or non-traditional communication methods to educate and inform clients
Community Partnerships	Does not participate in community collaborative(s)*	Participates in collaborative(s)* on a limited basis. Attends less than __ meetings per year	Participates in working collaborative* in the community as regularly scheduled. Attends __ meetings per year	Takes leadership role in collaborative(s)*	Instrumental in establishing collaborative(s)*
Quality of Communication (e.g. publications, presentations, correspondence, and other materials)	Needs assistance in developing materials &/or materials do not reflect good communication skills	Demonstrates acceptable verbal and written communication	Develops effective written and verbal skills for specific audiences, considering language, literacy or other issues	Assists others in developing audience-specific materials	Has been recognized for exceptional development of materials

Comments: _____

*Collaboratives may include any community group with purposes related to Extension.

Description/Definition **The mastery of a scientific discipline, body of knowledge, or technical proficiency that enhances individual and organizational effectiveness.**

INSTRUCTIONS: Mark the proficiency level attained for each indicator. Assign points to the proficiency levels as defined in the “Instructions and General Guidelines”. Total the points and record score under *Attained Score* for the *Professional Development* competency on the “Scoring Summary”.

Indicators	Proficiencies				
	Level I	Level II	Level III	Level IV	Level V
Professional Affiliations	Is not a member of professional organization	Attends a professional development meeting (not including Winter School)	Is a member of at least one professional organization	Actively participates on at least one professional organization committee	Holds an office in a regional, state or national professional organization
Trainings & Seminars	Does not attend 2 or more required trainings/seminars	Does not attend all required trainings/seminars	Attends all required trainings and seminars	Participates in training of others in specialized content	Has received formal recognition as an expert in specialized area
Knowledge of Subject Matter	Recognized as incompetent in subject area(s) &/or not current with knowledge and technical skills	Provides outdated &/or inaccurate subject matter information to clients due to limited knowledge	Recognized as being competent and having current knowledge and technical skills. Uses University resources	Accesses information beyond the University and personal resources. Analyzes and interprets information	Uses creative and innovative methods to access, analyze and interpret information
Publications/Presentations/Posters and Awards	Has not submitted a publication, presentation or poster for review &/or has not submitted an award application in the past 2 years	Has not submitted a publication, presentation or poster for review and/or has not submitted an award application in the past year	Submits at least one publication, presentation, or poster for review &/or submits at least one award application	Has at least one reviewed publication, professional presentation or poster, or received a local or state award	Has received multistate or national recognition of publication, presentation, poster or award
Service to the University &/or Extension (e.g., 4-H support duties, committee or task force appointments, etc.)	Declines opportunities for service	Does not fully participate in service assignments	Attends and actively participates in assignments	Participates actively in 2 or more service assignments	Provides effective leadership for assignment(s)
Progress toward Public Service Promotion	Shows no interest in participating in promotion process	Demonstrates evidence of dossier development but not within recommended time frame or attempts to meet expectations as mutually agreed	Makes timely progress in promotion process or meets expectations as mutually agreed	Prepares dossier and submits for promotion review	Successfully achieves promotion – and/or – assists others in promotion process (or serves on College/University Promotion Committee)

Comments: _____

Description/Definition The ability to generate resources and effectively manage resource use

INSTRUCTIONS: Mark the proficiency level attained for each indicator. Assign points to the proficiency levels as defined in the “Instructions and General Guidelines”. Total the points and record score under *Attained Score* for the *Resource Generation and Management* competency on the “Scoring Summary”.

Indicators	Proficiencies				
	Level I	Level II	Level III	Level IV	Level V
Financial resources (includes supplies & equipment)	Does not seek grants or outside sources of supplemental funds or in-kind services*	Seeks sponsorships, gifts, grants, or in-kind services*	Manages county resources and acquires alternative funding resources	Actively pursues non-traditional** funding sources	Receives non-traditional** funding
Volunteers	Makes no effort to recruit &/or use volunteers	Does not develop/follow an organized plan for volunteer recruitment &/or use	Recruits and uses volunteers. Volunteers assist with programs	Assigns leadership role to volunteers such as recruiting other volunteers, coaching and judging, teaching, etc.	Enables volunteers to manage other volunteers
Supervision of staff (paid and/or volunteer)	Lack of supervision negatively impacts program image	Lack of supervision results in misunderstanding, conflict or inefficiency	Supervises staff /volunteers effectively, addresses issues in a timely manner	Provides staff/volunteers with constructive criticism and coaching to enhance performance	Trains and involves staff/volunteers as coaches for others. Supervisory skills provide a model for others

Comments: _____

* In-kind services may include the use of physical facilities, supplies, time of support staff, guest speakers, telephone, transportation, computers, etc.
 ** Non-traditional funding is defined as monies or in-kind services obtained from non-routine sources.

