

## Revised Performance Appraisal for Extension Agents, County Directors, and Extension Area Specialists

### Introduction

Performance appraisal is one of the most important influences in developing a high-performing, satisfied workforce. Additionally, performance appraisals of educators must establish whether the clientele and society's educational needs are satisfied (Stufflebeam, 1988). Organizations depend on performance appraisal for a number of uses. Performance appraisal is necessary for organizations to: make merit-pay decisions, make promotions, help employees to improve performance, assign work more effectively, and identify instructional needs of employees (Baker, 1988; Bamberger & Meshoulam, 2000; Bennett, 1981; Bernardin & Beatty, 1984; Daley, 1992; Patterson, 1987).

In October, 2014, a team of 16 UT and TSU personnel representing county, regional, and departmental offices began work to revise the appraisal system.

### Proposed Timeline

The current appraisal system includes a rubric and process first launched in 2001 and revised in 2007. The Performance Appraisal Revision Committee is proposing that the current appraisal rubric (2007, revised) will be used for 2015 and 2016 appraisals. In fall of 2016, training will be conducted for new appraisal criteria, forms, and processes for all Extension Agents, County Directors, and Extension Area Specialists. The implementation of new forms, new criteria, and new process will begin with the 2017 annual planning process in fall 2016. The new appraisal criteria, forms, and processes will be used for all 2017 appraisals.

### Purpose/Objective

The Performance Appraisal Revision Team's ultimate purpose was to improve the performance appraisal process for Extension Agents, County Directors, and Extension Area Specialists. Specific goals were to:

1. Review job descriptions and position description questionnaires (PDQ) to identify major performance factors and qualifications.
2. Review performance factors, criteria, and references to create and simplify criteria used for performance appraisal.
3. Streamline forms and provide one shared UT and TSU form that is acceptable to both Universities' human resource offices.

### New Performance Factors and Criteria

- Program Development
  - Individual Annual Plan
- Program Management
  - Implementing
  - Evaluation
  - Reporting
  - Resource Management\*
- Program Accomplishments
  - Base Programs
  - Equity, Access, and Opportunity
  - Outcomes/Impacts
- Professionalism
  - Customer Service
  - Policy Compliance
  - Professional Development
  - Technology and Innovation
  - Work Habits
- Community and Organizational Leadership
  - Interpersonal Skills\*
  - Leadership\*
  - Optimizing Human Capital\*

\*includes additional criteria to reflect County Director role.

## Background

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The Performance Appraisal Revision Committee conducted numerous studies to select the performance factors, criteria, and descriptions including:

- A document review of 73 Extension Agents, 26 County Directors, and 6 Extension Area Specialists randomly selected job descriptions and PDQ's.
- A review of Extension Appraisal forms including those used by the University of Tennessee, Tennessee State University, University of Kentucky, University of Florida, Virginia Tech, Virginia State University, and Florida A&M State University.
- A Review of applicable research including:
  - Davis, W.L. & Verma, S. (1993). Performance appraisal: How extension agents view the system. *Journal of Extension*, 31 (4). Available at: <http://www.joe.org/joe/1993winter/a3.html>
  - Donaldson, J.L. (2014). Appraising the appraiser: Extension agents' and county directors' perceptions of their appraisers. *Journal of Extension*. Available at: <http://www.joe.org/joe/2014april/rb2.php>
  - Donaldson, J.L. & French, R.L. (2013). Tennessee extension agents' perceptions of performance appraisal. *Journal of Extension* (51) 3. Available at: <http://www.joe.org/joe/2013june/a10.php>
- An administrative review by Extension Program Leaders, Regional Directors, and Assistant/Associate Deans who reviewed the criteria and provided feedback.
- An Extension Agent, County Director, and Extension Area Specialist review in which nine high-performing personnel reviewed the criteria and provided feedback.

The performance appraisal factors, criteria, descriptions, and form are at: <https://tiny.utk.edu/Appraisal>

## Performance Appraisal Outcomes

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Research has identified a number of potential positive outcomes of performance appraisal systems, including:

- Distinguish employees for merit pay (Bamberger & Meshoulan, 2000)
- Increase communications between supervisors and employees (Bennett, 1981)
- Set action plans for the coming year (Wright & Evans, 2008; Bennett, 1981)
- Promote overall organizational and employee effectiveness (Daley, 1992)
- Improve the quality of personnel decisions, such as promotions (Murphy & Cleveland, 1995)
- Increase employee engagement and employee commitment to their jobs (Gilliland & Langdom, 1998; Murphy & Cleveland, 1995)
- Improve employee self-development and recognition (Brown & Larson, 1962)
- Improve employee job performance (Gilliland & Langdom, 1998)

## Performance Appraisal Revision Team

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- Glenn Turner, Sevier County