

Performance Appraisal for Extension Agent, Extension Agent and County Director, and Extension Area Specialist

Performance Factors and Criteria

Performance Factors	Criteria
<i>Program Development</i>	<ul style="list-style-type: none"> • Individual Annual Plan
<i>Program Management</i>	<ul style="list-style-type: none"> • Implementing • Evaluation • Reporting • Resource Management
<i>Program Accomplishments</i>	<ul style="list-style-type: none"> • Base Programs • Equity, Access, and Opportunity • Outcomes/Impacts
<i>Professionalism</i>	<ul style="list-style-type: none"> • Customer Service • Policy Compliance • Professional Development • Technology and Innovation • Work Habits
<i>Community and Organizational Leadership</i>	<ul style="list-style-type: none"> • Interpersonal Skills • Leadership • Optimizing Human Capital

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Performance Factors and Criteria Rating

Performance Factors	Criteria	Rating
Program Development	<ul style="list-style-type: none"> Individual Annual Plan 	Total ÷ 1= Program Development Rating
Program Management	<ul style="list-style-type: none"> Implementing Evaluation Reporting Resource Management 	Total ÷ 4 = Program Management Rating
Program Accomplishments	<ul style="list-style-type: none"> Base Programs Equity, Access, and Opportunity Outcomes 	Total ÷ 3 = Program Accomplishments Rating
Professionalism	<ul style="list-style-type: none"> Customer Service Policy Compliance Professional Development Technology and Innovation Work Habits 	Total ÷ 5 = Professionalism Rating
Community and Organizational Leadership	<ul style="list-style-type: none"> Interpersonal Skills Leadership Optimizing Human Capital 	Total ÷ 3 = Community and Organizational Leadership
		<i>Final Rating = Addition of performance factor ratings</i>

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Performance Factors and Criteria Rating

Overall Rating	Total Points
Exemplary	= 23-25
Exceeds Expectations	= 19-22
Meets Expectations	= 15-18
Needs Improvement	= 10-14
Unsatisfactory	= 9 or less

Individual Annual Plan

Unacceptable (1)				Acceptable (5)
<p>Individual Annual Plan is poorly constructed, lacks alignment, or is missing one or more components. Sources and information are not adequate to justify the educational program, and the advisory committee did not adequately represent the county or area served. Issues were not clearly identified.</p>				<p>Individual Annual Plan shows alignment among needs assessment, plans for the coming year, collaborators/partners/volunteers, evaluation, and funding. Advisory committee input was obtained in developing the Individual Annual Plan. The committee is representative of the county or area served.</p>

Implementing

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
<p>Rarely uses research based information in programming. Program delivery is rarely adapted to meet clientele needs. Demonstrates no collaboration and/or Extension marketing efforts.</p>	<p>Occasionally uses research based information in programming. Program delivery is occasionally adapted to meet clientele needs. Lacks collaboration and/or Extension marketing efforts.</p>	<p>Uses research based information in programming. Program delivery is routinely adapted to meet the needs of the clientele and various delivery methods are used. Collaborates well across program areas with other units and organizations. Plans a regular, on-going effort to market Extension. Uses materials provided by specialists.</p>	<p>Uses real life problems to teach subject matter and relevance to clientele. Collaborates well across program areas with other units and organizations.</p>	<p>Leads major collaborations or partnerships across program areas with other units and/or organizations. Adopts new methods and demonstrates connectivity and engagement with various audiences.</p>

Evaluation

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
<p>Provides no evaluation results and no program impact.</p>	<p>Has a plan for program evaluation with minimal accomplishment or progress toward goals.</p>	<p>Indicator data is fully aligned with program objectives and standard measurement tools properly demonstrate accomplishment or progress toward improving the program.</p>	<p>Program evaluation results contribute to improved programs and outcomes demonstrate progressive clientele behavioral or practice change.</p>	<p>Program evaluation represents the highest levels of program quality and outcome measurement with results showing improved quality of life, economic, and/or environmental conditions.</p>

Reporting

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
<p>Does not complete and/or submit reports in a timely manner.</p>	<p>Completes and submits reports that are incomplete or with errors.</p>	<p>Submits complete and accurate reports in a timely manner. Keeps data up-to-date and readily accessible.</p>	<p>Reports are completed accurately showing program progress and accomplishments. Reports are frequently shared with stakeholders.</p>	<p>Completes all reports on time and consistently shares impact with stakeholders. Consistently reports progress and program outcomes. Utilizes the reports to improve programming efforts.</p>

Resource Management

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
Does not seek outside sources of funding to support extension programs and/or fails to manage accounts according to University policy.	Occasionally seeks outside sources of funding to support extension programs.	Routinely seeks and obtains extramural funding , maintain budgets and accounts to provide a quality program.	Secures and utilizes extramural funding to enhance quality programs.	Secures and utilizes extramural funding through a comprehensive program to invest in high quality and/or new programs.
<i>County Director</i> – Rarely meets fiscal needs of the county program; demonstrates poor fiscal management; and/or physical resources meet minimal program and staff needs.	<i>County Director</i> – Occasionally meets fiscal needs of the county program; lacks fiscal management; and/or physical resources meet occasional program and staff needs.	<i>County Director</i> – Routinely meets fiscal needs of the county program; fosters transparency in resource management; meets expectations for fiscal management; physical resources are adequate, updated, clean, and address all program and staff needs.	<i>County Director</i> – Frequently provides fiscal resources to address emerging and new county program efforts; exceeds expectations for fiscal management; and works to improve physical resources to support innovative programs.	<i>County Director</i> – Consistently provides fiscal resources to address emerging and new county program efforts; exceeds expectations for fiscal management; and has a long-term plan for physical resource needs of programs and staff.

Performance Factor: Program Accomplishments

Base Programs

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
<p>Rarely shows effective base programming or responsiveness to community needs.</p>	<p>Occasionally conducts effective base programming.</p>	<p>Routinely conducts base programming efforts with participation levels that exceed expectations for county or area served.</p>	<p>Frequently conducts base programming efforts with participation levels that exceed expectations for county or area served.</p>	<p>Consistently manages effective base programming. Anticipates and addresses emerging community needs or requests through effective base programming.</p>

Equity, Access and Opportunity

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
<p>Shows no effort in reaching diverse and underserved clientele. Does not use Americans with Disabilities Act, Equal Employment Opportunity, Civil Rights, and/or Affirmative Action guidelines.</p>	<p>Occasionally reaches diverse and underrepresented clientele.</p>	<p>Repeatedly strives to reach diverse and/or underrepresented clientele. Participation includes diverse and underrepresented clientele.</p>	<p>Successfully demonstrates an involvement of diverse and underrepresented clientele. Serves as a resource for equity, access, and opportunity issues. Plans specifically for equity, access, and opportunity issues.</p>	<p>Engages stakeholders in reaching diverse and underrepresented clientele. Provides support, opportunity, resources, scholarships, etc. for underrepresented clientele. Implements sustainable approaches to involve underrepresented clientele.</p>

Performance Factor: Program Accomplishments

Outcomes/Impacts

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
No or minimal program participation or outcomes reported.	Occasionally documents outcomes and program participation.	Routinely documents outcomes which are at expected levels. Outcomes demonstrate clientele knowledge, attitude, and/or skills change.	Frequently documents outcomes which exceed expectations. Documented outcomes demonstrate progressive clientele behavior and/or practice change.	Consistently documents outcomes which exceed expectations. Documented outcomes demonstrate improved quality of life, economic and/or environmental conditions.

Customer Service

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
Does not communicate in response to client needs/requests and/or ignores client needs.	Occasionally fails to respond to client needs or requests.	Responds to client need or requests in a timely manner. Works well with all clientele groups. Communicates respectfully to all requests.	Proactively addresses client needs or requests.	Anticipates and addresses emerging client needs or requests.

Performance Factor: Professionalism

Policy Compliance

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
Does not follow nor demonstrates minimal knowledge of applicable policies.	Occasionally does not follow policy and/or lacks knowledge of applicable policies.	Understands and follows all applicable policies.	Interprets and encourages others to follow all applicable policies.	Recognized as a resource on applicable policies and procedures and is a role model to others.

Professional Development

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
<p>Rarely attends recommended professional development opportunities . Is not a member of a professional organization.</p>	<p>Occasionally attends recommended professional development opportunities. Is a member of a professional organization, but only occasionally participates.</p>	<p>Attends relevant professional development opportunities. Is a member of professional organization, and attends meetings. Has a current professional development plan.</p>	<p>Incorporates knowledge from relevant professional development into the Extension program. Seeks additional development resources through research literature. Actively participates on a professional organization committee.</p>	<p>Facilitates the professional development of agents and/or volunteers in specialized content. Receives recognition through relevant professional associations. Mentor and role model for new employees. Active in professional association at or beyond state level.</p>

Technology and Innovation

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
Minimal use of technology.	Occasional use of technology.	Routine use of appropriate technology for communications. Takes advantage of training opportunities to stay on the cutting edge with technology advances in content and program delivery.	Serves as a resource for using the latest technology for communications and programming . Shares innovative practices.	Recognized by Extension professionals and volunteers as highly competent in using the latest technology and/or innovation for teaching, communications, programming, and/or technical assistance.

Performance Factor: Professionalism

Work Habits

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
<p>Often displays a negative, uncooperative attitude toward co-workers, clientele, work assignments and requirements. Is frequently non-compliant with established work rules and organizational policies/protocol. Rarely demonstrates the ability to manage time and resources to meet commitments within established time frames.</p>	<p>Occasionally displays a positive, cooperative attitude toward co-workers, clientele, work assignments and requirements. Is occasionally non-compliant with established work rules and organizational policies/protocol. Requires assistance to manage time and resources to meet commitments within established time frames.</p>	<p>Displays a positive, cooperative attitude toward co-workers, clientele, work assignments and requirements. Complies with established work rules and organizational policies/protocol. Manages time, resources and demonstrates initiative to meet commitments within established time frames.</p>	<p>Contributes to an effective work environment by displaying a positive, cooperative attitude toward co-workers, clientele, work assignments and requirements. Frequently complies with established work rules and organizational policies/protocol. Frequently demonstrates the ability to manage time and resources to meet commitments within established time frames.</p>	<p>Inspires others to display a positive, cooperative attitude toward co-workers, clientele, work assignments and requirements. Almost always complies with established work rules and organizational policies/protocol. Coaches others to manage time and resources to meet commitments within established time frames.</p>

Performance Factor: Community and Organizational Leadership

Interpersonal Skills

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
<p>Demonstrates minimal interpersonal skills as needed to serve as a leader or effective team member; minimal collaboration with other agents and coworkers; and/or rarely utilizes appropriate communication methods to communicate with others.</p>	<p>Occasionally communicates with other agents and coworkers; focused on personal recognition over success of the team; and/or occasionally collaborates with other colleagues, volunteers, clientele and partners.</p>	<p>Communicates with and supports all agents and coworkers with their programming efforts.</p>	<p>Focused on success of team over personal recognition; successful collaboration with other agents and coworkers; contributes to both team projects and harmony in the workplace.</p>	<p>Readily utilizes interpersonal skills to mentor, develop, and coach others. Brings out the best in others by inspiring, motivating, and guiding them toward a goal. Builds and maintains effective relationships with colleagues, volunteers, clientele and partners. Actively works to resolve conflicts and contributes to harmony in the workplace.</p>
<p><i>County Director</i> – Fails to foster open communication among staff and/or rarely conducts office conferences.</p>	<p><i>County Director</i> – Lacks open communication among staff and/or occasionally conducts office conferences.</p>	<p><i>County Director</i> – Routinely fosters open communication among staff and routinely conducts office conferences.</p>	<p><i>County Director</i> – Frequently fosters open communication and frequently conducts office conferences.</p>	<p><i>County Director</i> – Consistently fosters open communication among staff through regular office conferences and effective one-on-one communication.</p>

Performance Factor: Community and Organizational Leadership

Leadership

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
Does not serve on any teams and/or special assignments at the county, region, or state level. Does not recognize the benefit to the organization or themselves by serving.	Occasionally serves on teams and/or committees only when specifically asked or directed. Consistently fails to follow through with commitments.	Routinely seeks and serves on county, multi-county and regional teams. Completes county, multi-county, regional and/or state assignments.	Frequently serves on county, multi-county, region, and/or statewide teams and is a participating member. Leads county, multi-county, regional and/or state assignments.	Consistently leads and serves on county, multi-county, region, statewide, multi-state, and/or national teams. Mentors others in these roles.
<i>County Director</i> – Demonstrates minimal county and stakeholder relationships, networking, and/or marketing of all Extension programs.	<i>County Director</i> – Occasionally demonstrates county and stakeholder relationships, networking, and/or marketing of all Extension programs.	<i>County Director</i> – Routinely demonstrates county and stakeholder relationships, networking, and marketing of all Extension programs.	<i>County Director</i> – Frequently demonstrates effective county and stakeholder relationships, networking, and marketing of all Extension programs.	<i>County Director</i> – Consistently demonstrates exemplary county and stakeholder relationships, networking, and marketing of all Extension programs.

Optimizing Human Capital

Unsatisfactory (1)	Needs Improvement (2)	Meets Expectations (3)	Exceeds Expectations (4)	Exemplary (5)
Minimally engages staff, volunteers, and/or participants as applicable for Extension operations and programming.	Occasionally engages staff, volunteers, and/or participants as applicable for Extension operations and programming.	Routinely engages staff, volunteers, and/or participants as applicable for Extension operations and programming. Effectively manages the volunteer process.	Frequently engages staff, volunteers, and/or participants as applicable for Extension operations and programming. Delegates appropriately to staff and volunteers to meet objectives of Extension operations and programming.	Consistently engages staff, volunteers, and/or participants as applicable for Extension operations and programming. Delegates appropriately and mentors staff and volunteers to meet objectives of Extension operations and programming.
<i>County Director</i> – Provides minimal direction of staff toward common goals, counseling, mentoring, and/or conflict management. Fails to conduct effective performance management.	<i>County Director</i> – Occasionally provides direction of staff toward common goals, counseling, mentoring, and/or conflict management. Performance management lacks effectiveness.	<i>County Director</i> – Routinely provides direction of staff toward common goals, counseling, mentoring, conflict management, and effective performance management.	<i>County Director</i> – Frequently provides direction of staff toward common goals, counseling, mentoring, conflict management, and effective performance management.	<i>County Director</i> – Almost always provides direction of staff toward common goals, counseling, mentoring, conflict management, and effective performance management.

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