

Extension Agent Performance Review Checklist for Directors Without Agent Supervisory Responsibilities

- Set a date for performance review with the Extension board and regional director.
- Regional directors will instruct local unit agents to complete the following reports/forms:
 1. 2016-17 Impact Reports in PEARS
 2. 2017-18 Action Plans in PEARS
 3. 2017-18 Professional Development Plans in PEARS
 4. Organizational Leadership and Service Summary (KSU8-47)**
 5. Self-evaluation (KSU8-46)**

**PDF documents available on the KSRE Employee Resources website under Forms.

The local unit director should facilitate a discussion with local unit staff of the local procedures and deadlines. Local deadline for agents to submit copies of each of the above_____. *(All documents should be completed by a locally established deadline or October 1, whichever is soonest.)*

- Agents should send copies of all completed documents electronically to their regional director.
- Remind each local unit agent to provide board members with copies of the agent's action plans, impact reports, professional development plans, and organizational leadership and service summary either in print or electronic format. To make the process easier on the board member, it will be helpful to print and scan all of these documents into one PDF file to send electronically, or provide each board member with a paper packet of materials. (Note: when printing from PEARS, the Google Chrome browser produces the best quality printed materials.) Agents should NOT send their self-evaluation to the board. To allow enough time for board members and local or regional directors to complete the remaining steps in the performance review process, these documents should be distributed to board members at least 4 weeks prior to the performance review board meeting and in advance of them receiving the Qualtrics survey.
- Provide orientation/training for Extension board members about their role in the agent performance review process. Explain the steps in the process and stress your local

timeline and deadlines. Orienting board members to the performance review process should take place prior to them receiving the link to the Qualtrics survey.

- Let board members know when to expect the link to the Qualtrics performance review tool they will use to provide their input to the reviews. Make them aware they will receive one email for each agent in the local unit. Qualtrics surveys will be sent at least 4 weeks prior to the performance review board meeting. The surveys will be sent by KSRE administration based on a date provided by the local unit or regional director. The survey will be active for 2 weeks from the day it is sent to board members. Stress your local deadline.
- Regional directors will receive a compilation of board members responses approximately one week after the close of the local unit's surveys. They will then use input from the board and the agent's self-evaluation as well as their personal observations and input to complete a performance review narrative that will be shared with the agent.
- The regional director and board chair will meet prior to your board's performance review meeting to review all of the unit's performance reviews.
- During an executive session at the performance review board meeting, the regional director will provide a brief summary of the evaluations to the whole board.
- After the performance review board meeting, the regional director will schedule a time with each local unit agent to deliver the performance review and set performance goals for 2017-18. The agreed upon goals will be added to the performance review narrative before it is signed.
- The regional director will collect appropriate signatures on the performance review documents.
- At a subsequent board meeting, the local director should include a time on the agenda for agents to share their performance goals with the board.