

Extension Agent Performance Review

Checklist for Directors without Agent Supervisory Responsibilities

- Set a date for performance review with the Extension board and regional director
- Agents will complete the following reports/forms:
 1. 2019-20 Action Plan Outcomes (Impact Reports) in PEARS
 2. 2020-21 Action Plans in PEARS including at least one signature program
 3. 2020-21 Professional Development Plan in PEARS
 4. Extension Agent Self-Evaluation in PEARS
 5. Performance goals for next year in PEARS
 6. [Organizational Leadership and Service Summary](#) (KSU8-47)* Upload into KSRE Agent Performance Review in PEARS. *This document is available in two places on the KSRE Employee Resources website under Agent Performance Review as well as under Forms.

The local unit director should facilitate a discussion with staff of the local procedures and deadlines. Be sure to refer to specific instructions provided by the regional director.

- 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 earliest.)

Once all the reports are completed and/or uploaded, agents need to “Submit” the documents in PEARS which provides the regional director a message that they have been completed.

- Provide orientation/training for Extension board members about their role in the agent performance review process. A video “[Agent Performance Review](#)” is posted on the [Agent Performance Review webpage](#) that explains the performance review process. Be sure to stress your local timeline and deadlines. Orientating board members to the performance review process should take place prior to them receiving the link to the survey.
- Let board members know when to expect the link to the performance review survey tool they will use to provide their input. Make them aware they will receive one email with a link that will give them access to all the agent’s performance review forms.
- Regional directors will 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 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 2019-20. 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.

08/20