

Extension Agent Performance Review
Checklist for Directors with Agent Supervisory Responsibilities

- Set a date for the performance review meeting with the Extension Board and Regional Director.
- Instruct local unit agents to complete the following reports/forms:
 1. 2019-2020 Action Plan Outcomes (Impact Statements) in PEARS
 2. 2020-2021 Action Plans in PEARS including at least one signature program
 3. 2020-2021 Professional Development Plan in PEARS
 4. Extension Agent Self-Evaluation in PEARS
 5. Performance goals for next year
 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.

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

Local deadline for agents to complete the forms listed above: _____.
(All documents should be completed by a locally established deadline or October 1, whichever is soonest.)

- 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. Orienting board members to the performance review process should take place prior to them receiving the link to the survey.
- To allow enough time for board members and local or regional directors to complete the remaining steps in the performance review process, please allow at least 2 -4 weeks prior to the performance review board meeting for board members to complete 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.
- As the local unit director (with supervisory responsibilities), you will have access to the PEARS management screen to monitor board member’s progress, provide reminders and view responses.

- After the deadline for board members to complete the surveys, use input from the board and the agent's self-evaluation as well as your personal observations and input to complete a performance review narrative (supervisor assessment in PEARS) that will be shared with the agent. The regional director will complete the performance review narrative for the local unit director.
- If your board utilizes a personnel committee to work with the local unit director to summarize evaluations and assign a performance ranking, meet with the committee.
- Meet with the regional director and board chair 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 local unit and regional director will provide a brief summary of the evaluations to the whole board.
- After the performance review board meeting, schedule a time with each local unit agent to deliver the performance review and set performance goals for 2020-2021. Make sure to input the agreed upon goals into the performance review narrative before it's signed.
- Collect appropriate signatures on the performance review narrative and return copies of the signed documents to the regional directors as soon as possible.
- Share the agent's written goals for the next year with the board at a subsequent board meeting.

08/2020