

MSU Extension Academic Performance Management

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Academic Performance Management

MSU Extension performance management is intended to support strong performance and promote professional growth of MSU Extension academic staff employees. The performance evaluation is based on the goals established between the academic staff member and the staff member's supervisor (e.g. Institute Director, Associate Institute Director, etc.) with contributions from the district director(s), where applicable. The goals and outcomes are documented in the Program Evaluation and Reporting System (PEARS) and/or other reporting systems, as appropriate to the individual's role and directed by organizational expectations. Performance Management also includes consideration of [core competencies](#) and [shared values](#).

Performance management includes three steps: performance planning, reflection/progress, and performance evaluation.

Performance Planning

Extension academic employees are involved in developing programmatic plans for their work through team and individual action plans. During the planning phase supervisors, district director(s), and Extension employees develop both team and individual performance efforts. These team and individual work efforts are expressed in the reporting system(s) as part of the action planning process.

The supervisor and district director(s) review the employee's draft action plan and works with the employee to finalize the action plan and expectations.

The documentation of an employee's programmatic action plan in the reporting system(s) is important for several reasons including, but not limited to:

- It represents an outline of the professional Extension employee's planned allocation of time and program resources.
- It provides a means to communicate with others about what the educator is doing. It may be a tool to inform advisory committees, Extension councils, and other stakeholders.
- It serves as a quarterly, or more frequent, reference for the Extension employee and their supervisor regarding planned goals.
- It provides a record and benchmark for building on important educational programming and professional development goals.
- It reflects the Extension employee's commitment to access in all factors of educational programs.

Reflection/Progress

The reflection/progress phase consists of ongoing documentation by the employee in the reporting system(s), seeking input from their supervisor and district director(s) to assess progress, and receiving coaching and feedback.

These interactions/discussions focus on the employee's progress in implementing their work, support the supervisor can provide, changes needed, and reinforcement for work activities done well.

Documentation in the reporting system(s) is critical to the review of performance by supervisors and district directors. Staff are expected to maintain accurate, timely reporting. A staff member who would like to consult with their supervisor and/or the appropriate district director(s) on the progress of their action plan and work throughout the year should contact these individuals to request time to meet.

Performance Evaluation

- The employee completes a self-evaluation by responding to questions about their performance during the review period and submits the information to their supervisor and district director(s) by the given deadline.
- The supervisor and district director(s) evaluate the employee's performance based on role expectations, established goals and objectives, documented accomplishments, and contributions at both the local and organizational levels.
- The performance evaluation form is drafted and provided to the employee.
- The employee, supervisor, and district director(s) (where applicable) meet to discuss the employee's performance, goals, objectives, accomplishments, and development opportunities.
- At the discretion of the supervisor, revisions may be made to the performance evaluation form based on information shared during the evaluation discussion.
- Signatures on the performance evaluation indicate that the evaluation meeting has occurred; they do not imply the employee's agreement with or concurrence with the evaluation.
- If an employee receives a rating of Partially Meets Expectations or Does Not Meet Expectations, the supervisor will issue a formal performance counseling memo.

Performance Levels

Supervisors, in collaboration with the district director(s), determine a performance rating considering the four levels noted below.

Exceeds Expectations

Job effectiveness consistently exceeds expectations on most, if not all, duties and goals during the review period. The employee achieves results well beyond established criteria for work performance and makes exceptional contributions. The employee uses sound process in carrying out job functions and errors are rare or non-existent. Employee demonstrates exceptional performance in quantity and quality of work; increases efficiency and effectiveness; takes initiative to expand depth and breadth of knowledge; and enhances existing work relationships with peers, administrators, stakeholders and/or customers, seeking opportunities for new collaborations. Demonstrates a commitment to incorporating and taking action toward positive culture in the workplace and programming, and access across a variety of communities/ groups throughout all programming efforts and interactions with others.

Meets Expectations

Job effectiveness consistently meets expectations on most, if not all, duties and goals during the review period. The employee achieves the expected results relative to established criteria of work performance, using sound process and decision-making in carrying out job functions. Occasions when expected results are not achieved are infrequent and utilized as learning experiences. Employee gives focused attention to suggestions for improvement. Employee makes efforts to incorporate positive culture in the workplace and programming, and access across a variety of communities/ groups.

Partially Meets Expectations

Job effectiveness is uneven and generally below performance expectations during the review period. The employee produces some results that meet the stated criteria of work performance and some results are below performance expectations for the review period. Errors are occasional and sometimes repeated. Few efforts related to positive culture in the workplace and programming, and access across a variety of

communities/ groups are apparent. Improvement in the quality and/or quantity of work in one or more areas of performance is necessary. **A formal performance counseling memo to improve performance and/or results is required.**

Does Not Meet Expectations

Job effectiveness is consistently below expectations during the review period. Employee fails to be successful in one or more of the following areas: produce results consistent with the established criteria for work performance; demonstrates role knowledge; the process in which the employee follows to carry out job functions is sound; dependable in meeting commitments and deadlines; and/or maintaining effective work relationships with peers, administrators, stakeholders and/or customers; no demonstrable efforts toward positive culture in the workplace and programming, and access across a variety of communities/ groups is apparent; substantial improvement in the quantity and/or quality of work in one or more areas of performance is necessary. **A formal performance counseling memo to improve performance and/or results is required.**

Additional Steps for “Partially Meets” or “Does Not Meet” Expectations

A formal performance counseling memo expresses the need for performance improvements. To the extent possible, the supervisor and district director(s), work in conjunction with Extension Human Resources to develop the formal performance counseling memo. This plan includes goals, expected outcomes, steps to achieve the goals, the involvement of others in aspects of the improvement period (if applicable), and a timeline. A meeting of the employee, the immediate supervisor and, when possible, the district director(s) is held to finalize and sign the plan. The employee’s agreement and/or signature is not required for the improvement period and expectations to proceed.

The supervisor and/or district director(s) will meet periodically with the employee to assess progress, and to provide feedback and support.

If the employee meets the goals of the formal performance counseling memo, the employee returns to the performance evaluation cycle. If the employee is not successful in the formal performance counseling memo period, additional action may be taken.