**MSU EXTENSION PERFORMANCE EVALUATION DOCUMENT**

Employee Name:       Review Period:

Institute: [ ]  AABI [ ]  CYI [ ]  HNI [ ]  CFEI [ ]  Director’s Office

Role(s):

Criteria used for this evaluation include all areas of core competencies noted below, in concert with an individual’s programming efforts and related job expectations. Please respond to each of the following questions. Institute leadership (i.e. Institute Director, Associate Director) and District Director will have reviewed your PEARS reports, so do not incorporate that level of detail, here. If you did not report an activity in PEARS, it is not to be listed here.

Also as noted below, for an individual to receive a rating of “Exceeds Expectations,” the individual’s job effectiveness must regularly exceed performance expectations. This means that the employee achieves results expected of their role, well beyond established criteria for work performance and demonstrates exceptional performance in quantity and/or quality of work. This is especially applicable when considering the employee’s programming (including appropriately written and submitted articles), reporting, evaluation, service to MSUE, and leadership in or service to the MSUE Institute. If an individual meets the definition of exceeds in all of these five areas, they will be in consideration for a rating of “exceeds expectations.”

**\*\*Routing Instructions:** Please email your **Word document** by February 1, 2024, to the appropriate institute support person (CFEI – Lori Martin; AABI- Becky Heim; CYI – Nick Adkins; HNI – Anne Walacavage; DO – Marie Garcia).

**EMPLOYEE SELF-EVALUATION (Total length of employee self-evaluation-responses to all questions - should be no longer than 3 pages.)**

1. Summarize what you feel were your three greatest programmatic accomplishments/achievements/adaptations for this review period, based on your work team(s) plan of work, supported by impact data and as reported in PEARS. Describe your growth areas over the last year. Identify tools and strategies that have assisted your success in the current work environment.
2. How do you feel you have contributed to organizational, work team and/or local office success?
3. How have your professional development activities over the past year helped you address MSU Extension’s core competencies?
4. What goals were you unable to achieve and why? Include both programming and professional development goals. Consider roadblock(s) that may have impeded your success in the current work environment.
5. Discuss your accomplishments in support of the Extension Diversity, Equity, and Inclusion (DEI) commitments within your role, area of responsibility and/or programming during this review period. The information provided will be used to facilitate discussion regarding accomplishments and growth areas related to incorporating diversity, equity, and inclusion into your work with MSU/ MSU Extension. Speak to how your work is connected to one or more of the [Extension DEI Dedication Statements](https://www.canr.msu.edu/outreach/about/diversity-equity-and-inclusion)**.**

1. In what area(s) do you believe you have opportunity for improvement/ development? Please consider the areas below and propose activities in the next year that will result in development/improvement.

|  |  |
| --- | --- |
| **Area for Continued Success** | **Proposed activity** (if an area is not being considered for development/ improvement, mark as “n/a”)**:** |
| **Content Area:** |  |
| [**MSU Extension Core Competencies**](https://www.canr.msu.edu/od/professional_development/core_competencies)**:** |
| **Diversity, Equity, and Inclusion** Leads and supports efforts to advance a diverse, equitable and inclusive community and workplace consistent with Extension’s core values. Builds awareness (of self and others across differences) and prioritizes diverse relationships, networks and collaborations to build and include all Michigan’s population across program planning, delivery and evaluation. Open to understanding, historical and current barriers that impact constituents and colleagues lives at the personal, interpersonal, institutional and culture levels. Consistently upholds the highest standards of equity and inclusion in programs to support and align with the [MSU Extension Dedication Statements](https://www.canr.msu.edu/outreach/about/diversity-equity-and-inclusion). |  |
| **Educational Delivery and Technology Adoption**Delivers content in formal and informal educational contexts using appropriate strategies and methods based on the target audience. Stays current with innovations in educational technology and adopts these technologies as appropriate, using modern theories in teaching and learning. (e.g., being an early adopter or tester of innovative tools). |  |
| **Interpersonal and Organizational Professionalism** Displays positive interpersonal skills and has self-awareness in being accountable, responsible. Recognizes areas for self-improvement and pursues professional development for continuous learning. Aligns actions to the mission and goals of Extension. |  |
| **Partnerships and Collaborations** Is aware of issues and variables vital to the community being served, and understands how these variables impact program prioritization, planning, and delivery. Continuously seeks opportunities and builds strategic partnerships to leverage and build support for programming to reach organizational goals and serve communities according to their needs. (e.g., communicates with media, communicates Extension’s value to partners, awareness of community).  |  |
| **Physical and Fiscal Resources**Mindful of individual and shared workspaces and resources. Exhibits good stewardship of physical and financial resources (e.g., storage, supplies, budgets, financial records and reporting).  |  |
| **Program Development, Evaluation, and Reporting**Supports the development and delivery of programs including the collection of appropriate data to measure impacts. Understands the need to communicate programming outcomes to stakeholders and continuously improve programming content and marketing through evaluation. (e.g., needs assessment, marketing, program evaluation).  |  |
|  **Team Work and Leadership:**Thoughtfully engages in working with others throughout the organization to plan and accomplish the organizational mission and promote shared values. Positively influences groups and individuals.  Establishes and supports teams such as advisory boards, committees, councils, etc. (e.g., coaching, mentoring, creating a vision, implementing action plans). |  |

**INSTITUTE LEADERSHIP EVALUATION** (Includes input from District Director)

Observations of achievement of planned efforts (based on reported/documented efforts in PEARS)

Contribution to the local office/ local team functions.

Contribution to organizational success

Success in developing support for programs (Partnerships and Coalitions, Physical and Fiscal Resources)

Opportunities for Development

Recommendations for the year(s) ahead

**PERFORMANCE RATING**

[ ] Exceeds [ ] Meets [ ] Partially Meets [ ] Does not meet

## Exceeds Expectations

Job effectiveness consistently exceeds expectations on most, if not all, duties and goals during the review period. 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/or 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 diversity, equity, and inclusion efforts 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 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 in quantity and or quality of work. Employee makes efforts to incorporate diversity, equity, and inclusion strategies into all programming and when interacting with others.

## Partially Meets Expectations

Job effectiveness is uneven and generally below performance expectations during the review period. 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 diversity, equity, and inclusion are apparent. Improvement in the quality and/or quantity of work in multiple areas of performance is necessary. **A written performance plan to improve process and/or results is required.**

## Does Not Meet Expectations

Job effectiveness is consistently below expectations on most, if not all, duties and goals 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 effectively incorporating diversity, equity, and inclusion efforts into the employees work is apparent. One or all of these characteristics are present in performance. Substantial improvement is required in quantity and/or quality of work. **A written performance plan to improve process and/or results is required.**

**ACKNOWLEDGEMENT/SIGNATURES**

I acknowledge that this report has been discussed with me. I may or may not agree with the rating, strengths and/or opportunities, and I understand that I have the option of formally appealing this result within 28-calendar days from the date of receiving this evaluation as outlined in the Extension Academic Appeal Process found in the [MSU Extension Administrative Handbook](https://www.canr.msu.edu/od/human_resources/administrative%20handbook.pdf) located on the [MSU Extension/Human Resources/ Administrative Handbook website](https://www.canr.msu.edu/od/human_resources/administrative_handbook).

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Employee Signature Date

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Institute Leadership Signature Date

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District Director Signature Date