**Performance Evaluation Process for 2019**

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| **By September 1****All Educators, CEDs** – Complete and email these documents listed below to District Secretary and CED:In SuccessFactors:* Self-Assessment Annual Evaluation\* – Complete and email to District Secretary and CED.
* Goals for 2019-2020\* – Create and email to District Secretary and CED.

In Digital Measures:* Complete monthly reporting and email the “Extension Educators – Summary”\* for date range: September 1, 2018-August 31, 2019 to District Secretary and CED.

Via Qualtrics:* Non CED Educators – Complete CED evaluation (link emailed from District Secretary).

\*Refer to Included Instructions for assistance. |
| **By September 10 or earlier****CEDs will:*** Review 2018-2019 Educator Self-Assessment Annual Evaluation, Educator 2019-2020 Goals, and Digital Measures report – “Extension Educators – Summary”.
* Complete the Extension Educator Annual Performance Evaluation form with appropriate comments for each Educator.
* Return Performance Evaluation form(s) electronically to District Secretary **by September 10 or earlier.**
* Schedule Extension Board Program Reviews **at least 2 weeks prior** to meeting with District Director. These meetings should be scheduled from August – October.
* Send the District Secretary a copy of all staff’s Extension Board Report/Presentation prior to the Extension Board presentations.
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| **County Extension Board Program Review meeting*** Educators prepare an Educator Program Summary, 1-2 pages in outline form of program accomplishments and goals for Extension Board - ***do not use the Self-Assessment Annual Evaluation document*.** Educator Program Summary should emphasize program outcomes and accomplishments from the past year and include goals with SMART objectives for the coming year.
* Educators give a presentation to Extension Board, highlighting program accomplishments and discuss proposed goals for the coming year. Presentations focus on program impact and outcomes. Time frame – 10-12 minutes.
* Extension Board members provide input on program strengths and program recommendations via Qualtrics (preferred) or paper format on programming.
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| **September - December** **District Director and CED** * Meet with individual Educators to discuss Performance Evaluation.
* Review goals with SMART objectives for the 2019-2020 year.
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| **By December 1*** **CEDs -** submit signed Clerical and Program Assistant Evaluations to District Office. Use county evaluation tool if available. Keep a copy in county personnel file.
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**Helpful Hints for Working in SuccessFactors:**

* Save Often – System automatically saves after being idle for 15 minutes, but any unsaved work will be lost if exiting the system without saving.
* Work in Chrome

**Self-Assessment Annual Evaluation Instructions:**

* Refer to pages 9-11 of the Goal Setting and Annual Performance Review for Staff Quick Reference Guide. <https://www.purdue.edu/hr/lod/media/forms/QRC_Goals_and_Performance_Review_for_Staff.pdf>
* Please change the weight of goals from 75% goals 25% competencies to 100% goals.
* Do not do the Unit Competencies section. We will not be utilizing this section for the 2018-2019 year.
* Instructions include:
	+ From the Home page, To Do Section of Success Factors, click Review Performance & 360 tile.
	+ Click Employee updates goals and completes self-assessment.
	+ Scroll down to the section titled Goals. This is the first section of the form. Click on the edit section weight. Change Goals to 100% and Unit Competencies to 0%. Click Save.
	+ All goals maintained throughout the performance plan year are automatically loaded into the self-assessment form during the Performance Review period. From here you can add a Rating and Employee Comments for your manager’s review for each goal. Please report against your objectives, 1a, 1b etc. Comments should include activities or learning events, partnerships, financial resources, evaluation tools, and outcomes/impact.
	+ You can also enter Overall Comments on Goal Achievement. (optional) This is a place to include additional information that isn’t reflected in your listed goals and objectives.
	+ 0nce the self- assessment form is complete, click the print button in the top right hand corner. Select the following sections: Goals and Include sections details. Hit print. Once the print page comes up, change the destination to save as pdf. Save the document as FirstLast Name\_18-19Self-Assessment (Ex: JDoe\_18-19Self-Assessment). Save to your computer. Once saved, it will take you back to the print setup page. Hit cancel. Email to CED & District Secretary by September 1st.
	+ Click Submit to Manager for review.
	+ Enter additional comments (optional). If comments are entered, they will appear in email notification to manager. Click Submit to Manager for review and your manager will receive another email notification.

**Goals Instruction:**

Refer to pages 1-2 and 6-8 of the Goal Setting and Annual Performance Review for Staff Quick Reference Guide. <https://www.purdue.edu/hr/lod/media/forms/QRC_Goals_and_Performance_Review_for_Staff.pdf>

When adding your goals please make note of the items below.

* + From the Home page, click Goals. Then select 2019-20 Goal Plan from the drop down box.
* Add a Blank Goal – Each full time educator will have four program goals. CEDs will have three program goals and one administrative goal. Weighting for all goals must equal 100%.
* Each goal will be a separate entry. The goal number will generate automatically and will show 1.1, 1.2, etc.
* Visibility needs to stay marked private. If you mark public, your work will be visible by your peers.
* In the Goal Name section, you will enter your goal.
* In the description section, you will enter the needs assessment.
* Enter Objectives in the metric section as a, b, c, etc.
* Enter start date as 09/01/2019.
* Enter due date as 08/31/2020.
	+ Click on Actions. Click on the print option. Select PDF. Hit the open button. Save the document as FirstLast Name\_19-20Goals (Ex: JDoe\_19-20Goals). Save to your computer. Once saved, email the document to the CED & District Secretary by September 1st.
* For the 2019-2020 year we will be using the competency section. These competencies will automatically show in your 2019-2020 performance review. The following Purdue Competencies will be used during evaluation:
	+ Culture and Value
		- Diversity, Equity & Inclusion
		- Organizational Citizenship
		- Positive Relations & Teamwork
	+ Job Performance
		- Needs Assessments
		- Advisory Boards
		- Programs
		- Learning Events
		- Impact Statements
		- Communication & Marketing of Programs
	+ Professional/Career Development
		- Trainings
		- On Boarding & Certifications
		- Coaching & Mentoring

**Digital Measures Instructions:**

* In Digital Measures, go to the Reports tab and click on Extension Educators-Summary.
	+ Date Range: September 1, 2018 – August 31, 2019
	+ File Format: Word
	+ Run Report
	+ Save report as FirstInitialLastName\_2019 DM Summary (JDoe\_2019DMSummary). Email to CED & District Secretary by September 1st.