

Extension Performance Management Program for Non-academic Programmatic Staff

MSU Extension recognizes the need for consistent review of performance across Institutes and MSU Extension. To this end, the following program has been developed for current and newly hired non-academic programmatic staff:

Must-dos in the evaluation process:

- Remember the reasons for the Performance Management process and completing performance evaluations:
 - To support the success and advancement of the employee and MSU Extension,
 - This can help create positive messaging during performance evaluations.
- [Performance evaluations for non-academic programmatic staff](#) must be reviewed and approved by the appointed Review Team (Institute Leadership (IL) & a representative of the MSU Extension Human Resources Team (MSUE HR)), as defined by the schedule below, before being communicated to the employee. This applies to all ratings, even those assigned a “meets expectations”.
- Supervisors ask each employee to complete and return a [self-review](#) in time to consider this information while drafting the interim or annual performance evaluation.
- Supervisors seek input from the appropriate District Director (DD) to include in the submitted draft performance evaluation.
- Supervisors are responsible for scheduling performance evaluations that allow for DD participation, if the DD chooses to participate.
- Tone is important.
 - Stating fact without using subjective or generalized statements is more impactful and neutral in tone.
 - Evaluate the tone of the performance evaluation, is it appropriate?
 - Does it support the message being delivered?

Must-dos when completing forms:

- A performance evaluation should reflect an individual’s legal name.
 - A nickname may be used in a performance evaluation if the individual actually uses and goes by the nickname at work. To properly establish the use of the nickname the initial mention of the individual should include the legal name with a parenthetical nickname, see examples below:
 - Nicholas (Nik) Sway – to use the nickname Nik
 - Catherine (Cathy) Breeze – to use the nickname Cathy
- Each performance evaluation must include the employee’s PERNum.
 - This can be found in EBS under your Supervisor Tools. If you bring up your direct report, the number is listed with that employee’s profile.
- Review the performance evaluations for grammar and spelling.
- The use of acronyms (ex. SNAP, EFNEP, FUTP60, 4-H PC, etc.) is acceptable after spelling it out the first time it appears in the review. This will help if someone who knew nothing about Extension needed to read the evaluation.
 - For example: “She is a valuable member of the Nutrition and Physical Activity (NPA) team in District 17. With her assistance the NPA team has developed several new partnerships.”
- Supervisors should refer to information available regarding the job duties and expectation of a specific employee including, but not limited to: position description, the employee’s self-evaluation, letters/memos of expectations, plans of work, 4-H Core responsibilities, etc., as they are drafting the performance evaluation.

- Draft reviews should include enough detail and specific examples for the Review Team to make an informed decision regarding the performance level of the employee (attach additional pages to the review, as needed).
 - Reviews submitted that do not allow for proper review of an employee’s performance will be reflected in the performance evaluation of the Supervisor.
 - Performance Evaluations submitted with a “does not meet expectations” or “developing” rating must also include a draft [performance improvement plan \(PIP\)](#), for review. This requirement does not apply to interim reviews, see below for additional information.
- Complete the [performance planning](#) form with input from the employee. This is due within 30-days of the completion of the review but no later than outlined in the calendar below. You may also complete the [goal setting](#) form. These goals do not replace the expectation of the position but, rather, should support the employee in enhancing performance in the position they hold.
- Review your performance evaluation for subjective terms. For instance:
 - If you have written “great” is that statement supported by examples of what makes the performance stand out?
 - Does the description of work align with the approved performance evaluation level? Terms such as “Extraordinary”, “Exceptional”, “Above and beyond”, etc., on a performance review marked as “Meets expectations” can seem conflicting.

Notes about timelines & deadlines:

- If a due date falls on a weekend or holiday, the due date will be considered the *prior* working day.
 - Ex. an item due February 25, 2018 would actually be due February 23, 2018; an item due May 27, 2018 would actually be due May 25, 2018.
- Evaluations are considered complete on the date the employee and supervisor sign the evaluation. If these dates differ, the later of the two dates is the completion date.
- While reminders of due dates during this process may be sent out, ensuring timely submission of appropriate documentation is the responsibility of the Supervisor.
- Timelines for employees on a probationary period following hiring into MSU Extension remain the same: An [interim review](#) is due at 6-months into the position, and an annual review is due at the 1-year anniversary. Supervisors should bring any performance concerns regarding probationary employees to the attention of the appropriate ID/AID, DD, and MSUE HR as soon as possible.

What to do with completed forms:

- All MSU Extension non-academic performance evaluation forms/documents should be submitted to msue.hr@msu.edu for processing regardless of the instructions on the Performance Excellence website/forms stating they should be returned to Central HR. Extension HR will ensure these documents are properly processed with Central Human Resources once submitted to msue.hr@msu.edu.
 - Copies of necessary documents are kept on file with Central Human Resources and Extension Human Resources.

Annual Evaluation Timeline

EMPLOYEES NOT IN A PROBATIONARY PERIOD

| Institute | *SE communicates Timelines for performance evaluations to direct reports: | *SE drafts emails to be sent for self-reviews and DD feedback: | *SE begins drafting performance evaluations & PIP (if needed): | SE requests Self Review from employees and DD Feedback as early as: | *SE edits performance evaluation based on feedback from employee and DD: | Performance Evaluations Due for Review by: | Notice of Approved Ratings Returned to Supervisors by: | Supervisors conduct evaluation meetings | Completed (Signed) Evaluations due to Extension HR (msue.hr@msu.edu) by: | With employee input, complete and return (msue.hr@msu.edu) performance planning form no later than: |
|------------------------------------|---|--|--|---|--|---|--|--|---|--|
| CYI & AABI | Week of July 18 th | Late December/Early January | Early January through February 24 th | January 18 th | On-going as information is returned | February 25 th (accepted as early as February 11 th) | March 12 th | March 13 th – April 1 st (Reviews dated after April 1 st will be considered late) | April 10 th | April 30 th |
| HNI & CFEI | Week of October 17 th | Late March/Early April | Early April through May 26 th | April 17 th | On-going as information is returned | May 27 th (accepted as early as May 13 th) | June 13 th | June 13 th – July 1 st (Reviews dated after July 1 st will be considered late) | July 10 th | July 31 st |
| +/- 49 days (about 7 weeks) | | | | | | | | +/- 20-days (about 3-weeks) | +/- 10-days (about 1 ½ weeks) | +/- 30-days (about 4-weeks) |
| | | | | | | Institute/ EHR reviews information; +/- 15-days (about 2 weeks) | | | | |

***These steps are suggestions to assist with moving this process along smoothly. They are not required, only strongly suggested.**

Probationary Period Timeline

EMPLOYEES IN A PROBATIONARY PERIOD
(First year following hire; Interim and first annual review)

| Institute | Request Self Review and DD Feedback as early as: | Performance Evaluations Due for Review by: | Notice of Approved Ratings Returned to Supervisors by: | Supervisors conduct evaluation meetings | Completed (Signed) Evaluations due to Extension HR by: | With employee input, complete and return performance planning form W/I 30-days of the evaluation but no later than: |
|------------|---|--|--|--|--|--|
| All | Up-to 8-weeks in advance of anticipated review date; performance concerns should be discussed with ID/AID, DD, and MSUE HR as soon as possible. | At least 10-business days in advance of scheduling the review meeting with the employee. | Within 10-business days | Within 10-days of receiving notice of approved rating. Reviews dated after the 6-month anniversary date for interim reviews and after the 1-year anniversary date for the 1 st annual review will be considered late. | Interim review – by the 6-month anniversary date. First annual review – by the 1 st year anniversary date. | 1st - Within 30-days of hire. 2nd - within 30-days of interim review. 3rd – within 30-days of 1 st annual review. |