

NC STATE

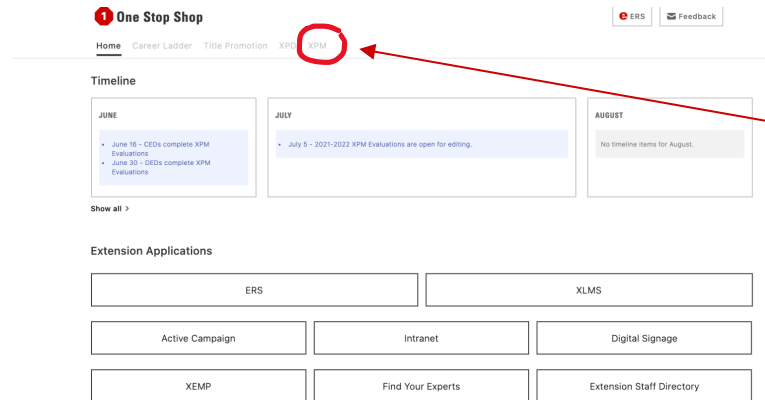
EXTENSION



One Stop Shop XPM User Guide

Accessing the XPM System

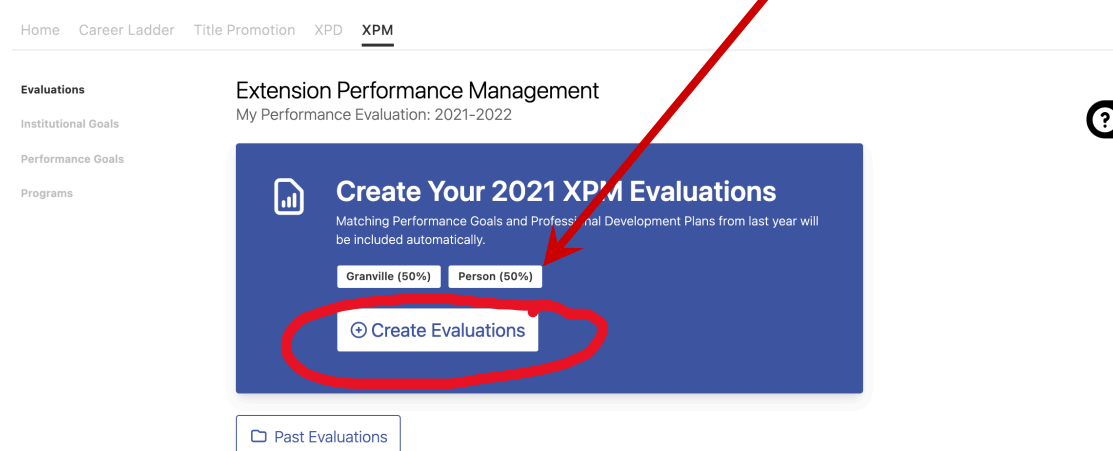
1. Go to the One Stop Shop (OSS) landing page <https://oss.ces.ncsu.edu>



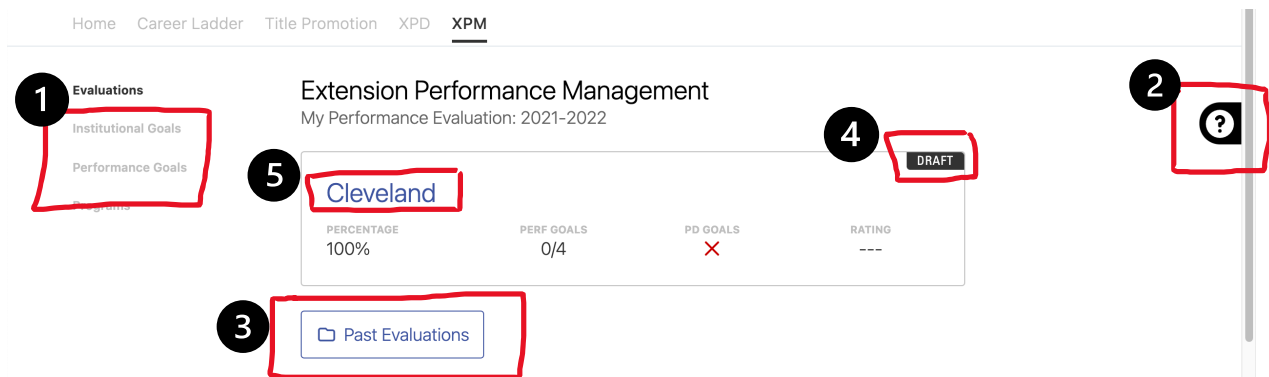
2. Click on the **XPM Application Link**

Create an Annual Evaluation Plan

Click on the **Create Evaluations** button to begin. Single-County Agents and Area Specialized Agents will see their single base county listed. Multi-County Agents will see each of their assigned counties listed.



Tour of the XPM Home Page



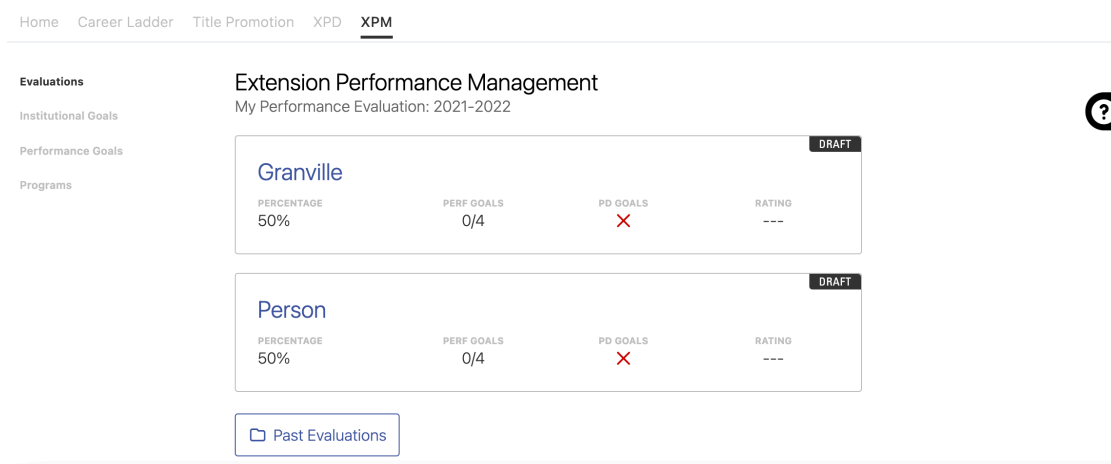
1 - Select from the list of options to see a list of the current year **Institutional and Performance Goals** and their descriptions

2 - Select the **HELP question mark** to open the XPM website and find answers to questions about the XPM process

3 - Select the **Past Evaluations** button to view prior year performance evaluations

4 - View the **status** of your current year evaluation

5 - Single-county Agents click on your county name to **open** your current year performance management document, Multi-county Agents click on the name of one of the counties to open the first plan



Entering the Annual Performance Management Plan in XPM

1. The **Institutional Goals** established by NC State for all University employees are displayed first. Discuss with your supervisor how these expectations apply to your specific position.

[Home](#) [Career Ladder](#) [Title Promotion](#) [XPD](#) [XPM](#)

Evaluations

Institutional Goals

Performance Goals

Programs

NC STATE

EXTENSION

Extension Performance Management (XPM) - Agent

ANNUAL PERFORMANCE EVALUATION CYCLE

July 1, 2021

TO

June 30, 2022

County Name:

Employee Name:

Supervisor Name:

Employee ID:

INSTITUTIONAL GOALS

Review the institutional goals with the employee and discuss them in relationship to the duties and expectations of the position. Provide additional clarification of specific expectations, as needed.

▼ Expertise

a. **Precision:** Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee's position and profession.

b. **Resourcing:** Makes efficient and appropriate use of materials and documents work appropriately.

c. **Innovation:** Looks for ways to improve efficiency or quality.

d. **Development:** Maintains technical skills and relevant professional credentials.

▼ Accountability

a. **Productivity:** Completes required volume of work by established deadlines and stays productive throughout workday.

b. **Autonomy:** Generally completes work with few reminders and/or infrequent oversight.

c. **Prioritizing:** Takes sufficient/appropriate measures to plan and organize work, prioritize tasks, and set realistic goals.

d. **Coordination:** Seeks needed information to complete work and timely communicates status with relevant parties.

▼ Customer-Oriented

a. **Clarity:** Listens to determine the most effective way to address customer needs and concerns.

b. **Awareness:** Shows a solid understanding of customer needs, seeks out customer input to better understand needs, and develops ideas to meet those needs.

c. **Attentiveness:** Follows through on commitments, despite time pressures or obstacles, and maintains relevant communication with customers until job is completed.

d. **Diplomacy:** Maintains a professional and respectful tone and exhibits diplomacy when dealing with frustrated individuals or during sensitive or confrontational situations.

▼ Team-Oriented

a. **Collegiality:** Communicates and engages directly, clearly, and tactfully with colleagues.

b. **Collaboration:** Provides feedback and healthy dialogue on performance and operational issues, as requested, willingly adapts to change, and adheres to decided actions.

c. **Contribution:** Makes decisions with others in mind, and willingly performs additional duties when team members are absent, during times of increased workload, or as otherwise required by management to meet business needs.

d. **Attendance:** Absences are infrequent and do not place an undue burden on supervisor or colleagues.

▼ Compliance & Integrity

a. **Policy:** Complies with personnel and equal opportunity policies, including prohibitions on harassment, discrimination, and workplace violence, and all other policies, including appropriate use of university resources.

b. **Safety:** Complies with all safety requirements for the position, including successful completion of training and proper use of personal protective equipment.

c. **Ethics:** Chooses ethical actions, even under pressure, avoids situations considered inappropriate or that present a conflict of interest, holds self and others accountable for ethical decisions.

d. **Respect:** Appreciates individual and cultural differences and treats all people with dignity and respect.

▼ Supervision (for supervisors only)

a. **Oversight:** Provides adequate stewardship of assigned resources, including budget, space, equipment, and staffing.

b. **Goal-Setting:** Provides clear objectives that foster work unit development and align with University values and goals.

c. **Managing Talent:** Provides candid, timely, and constructive feedback on performance and behavior, hires individuals with the qualities and skillsets for success, and contributes to meeting University's EO and affirmative action goals.

d. **Leading:** Serves as role model and engenders trust, commitment, and civility.

Evaluation Details

Status

Draft

Performance Goals

0/4 defined

PD Activities

not defined

History

1 day, 23 hours ago

evaluation created by

Along the right column the status of your plan and document history is displayed.

Evaluation Details

Status

Draft

Performance Goals

0/4 defined

PD Activities

not defined

History

1 day, 23 hours ago

evaluation created by

Evaluation Details

Status

Draft

Performance Goals

0/4 defined

PD Activities

not defined

History

1 day, 23 hours ago

evaluation created by

4

2. The **Performance Goals** established by Extension are displayed next. Work with your supervisor to develop measurable individual strategies for the upcoming year in support of the performance goals. Click the **Edit** button to enter draft strategies for each of the 4 goals. When you click the Edit button a text box will open for you to enter the strategies. **Save** the strategies and move on to the next goal.

Multi-County Agents will enter strategies and professional development activities for **each assigned county**. Strategies and development activities might be the same across counties or could be different depending on program needs.

The screenshot displays the 'GOALS AND OBJECTIVES' section of a web application. It features a table of goals with columns for 'Goal', 'Description', and 'Strategies'. The first goal is 'Marketing: Utilize effective marketing strategies to build awareness of Extension's educational programs and events, grow Extension's brand recognition and public image, and communicate the value and impact of Extension programs.' The 'Strategies' column for this goal has an 'Edit' button circled in red. A modal window is open over the 'Strategies' column, showing a text area for entering strategies, a 'Cancel' button, and a 'Save' button. To the right of the goals table, there is an 'Evaluation Details' sidebar with sections for 'Status' (Draft), 'Performance Goals' (0/4 defined), 'PD Activities' (not defined), and 'History'.

GOALS AND OBJECTIVES		
Review the broadly defined Extension goals and descriptions with the employee that are based on statewide and local needs, priorities, and strategic initiatives. Develop individual strategies for accomplishing each goal.		
Goal: Marketing: Utilize effective marketing strategies to build awareness of Extension's educational programs and events, grow Extension's brand recognition and public image, and communicate the value and impact of Extension programs.	Description: Use appropriately branded marketing and communication tools and channels to promote the benefit and value of Extension educational programs. Promote N.C. Cooperative Extension and local Extension programs and events to stakeholders and local decision-makers. Articulate what Extension is, who we serve, and the key impacts of Extension programs to county leadership, members of the community and stakeholder groups. Intentionally market the ability to accommodate the needs of people with disabilities and clients who have a limited ability to speak or read English.	Strategies Edit
Goal: Program Planning: addresses identifying and addressing the needs of stakeholders to develop or adapt appropriate for content as needed including issues related to the Americans with Disabilities Act (ADA) inclusion, use of the non-discrimination statement and accommodation statement, limited English proficiency requirements, etc.	Description: Work with program stakeholders to develop or adapt appropriate for content as needed including issues related to the Americans with Disabilities Act (ADA) inclusion, use of the non-discrimination statement and accommodation statement, limited English proficiency requirements, etc.	Strategies Edit

Strategies:

Cancel Save

Evaluation Details
Status
Draft
Performance Goals
0/4 defined
PD Activities
not defined
History

3. Click on the **Edit** button to enter planned **Professional Development Activities** for the upcoming year. Then **save** your professional development plan.

Professional Development Activities

At the beginning of the performance cycle, the employee and supervisor develop and document an annual professional development plan identifying training and professional development activities for the employee to participate in that align with their individual career goals.

Professional Development Expectations: Agents are required to complete at least one three-credit hour graduate class every five years until they have received Full Agent status.

Note: Per Chancellor Woodson's June 4, 2020 message entitled, "Diversity and Inclusion: Recognizing our Shortcomings, Working to Improve", NC State requires all employees to complete at least one diversity, equity and inclusion (DEI) course per year. In addition, the University recommends that each employee have at least one additional individual DEI learning and development goal each performance cycle.

The supervisor determines with the employee the appropriate learning and development goal(s) for the cycle. The supervisor is expected to ensure the mandatory one DEI class requirement is met and can also work with the employee to set additional learning and development goals. The DEI learning plan is not individually rated but does demonstrate to employee performance under the Institutional Goal of "Respect: Appreciates individual and cultural differences and treats all people with dignity and respect." Progress under the DEI development plan should be discussed periodically with the employee. Please refer to the OIED website, or LinkedIn Learning for information and resources.

Edit

Evaluation Details

Status

Draft

Performance Goals

0/4 defined

PD Activities

not defined

History

1 day, 23 hours ago

evaluation created by A

Submitting your Annual Performance Management Plan for Approval

After entering strategies for each of the 4 performance goals and professional development activities the draft XPM plan may be submitted to your supervisor for review and approval. Click on the **Submit for Approval Button** in the Evaluation Details frame.

Professional Development Expectations: Agents are required to complete at least one three-credit hour graduate class every five years until they have received Full Agent status.

Note: Per Chancellor Woodson's June 4, 2020 message entitled, "Diversity and Inclusion: Recognizing our Shortcomings, Working to Improve", NC State requires all employees to complete at least one diversity, equity and inclusion (DEI) course per year. In addition, the University recommends that each employee have at least one additional individual DEI learning and development goal each performance cycle.

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Edit

Evaluation Details

Status

Draft

Performance Goals

defined

PD Activities

defined

Submit for Approval

History

2 days ago

evaluation created by

Multi-county agents repeat this process for their next assigned county until all counties have been completed. The status changes from DRAFT to SUBMITTED once the XPM has been successfully submitted.

Home Career Ladder Title Promotion XPD XPM

Evaluations

Institutional Goals

Performance Goals

Programs

Extension Performance Management

My Performance Evaluation: 2021-2022

Granville	PERF GOALS 4/4	PD GOALS ✓	SUBMITTED RATING ---
Person	PERF GOALS 4/4	PD GOALS ✓	SUBMITTED RATING ---

[Past Evaluations](#)

?

Home Career Ladder Title Promotion XPD XPM

Evaluations

Institutional Goals

Performance Goals

Programs

Extension Performance Management

My Performance Evaluation: 2021-2022

Cleveland	PERF GOALS 4/4	PD GOALS ✓	APPROVED RATING ---
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[Past Evaluations](#)

Once your supervisor approves your plan the status will change from SUBMITTED to APPROVED

The Mid-Year Review

Once your supervisor enters your midyear review comments into the XPM system, you will receive an **email notification** to log into XPM, **add any comments** (optional), and **acknowledge receipt** of the midyear review by checking the box and clicking on **Save**.

Home Career Ladder Title Promotion XPD **XPM**

Evaluations

Institutional Goals

Performance Goals

Programs

Extension Performance Management

My Performance Evaluation: 2021-2022

Cleveland **MIDYEAR**

Your Midyear Performance Evaluation is ready. Please add your signature and any comments.

PERCENTAGE	PERF GOALS	PD GOALS	RATING
100%	4/4	✓	---

Past Evaluations

Employee Comments

B I **☰ ☲ ☱ ☴ ☵ ☶ ☷** **🔍 🗑**

I agree with your comments

Signature

☒

Checking the Signature box serves as your digital signature.

For verification purposes, your **Unity ID** (), **IP Address** (), and other auditing information are recorded when you save this form.

Cancel **Save**

Supervisor Comments:

Evaluation Details

Status
Midyear

Performance Goals [🔗](#)
✓ defined

PD Activities [🔗](#)
✓ defined

Midyear Evaluation [🔗](#)
✗ employee signed
✗ supervisor signed

Overall Evaluation [🔗](#)

History

29 seconds ago
midyear employee signature requested by

4 minutes ago
evaluation approved by

The Final Review

Once your supervisor enters your final review comments and overall rating into the XPM system, you will receive an **email notification** to log into XPM, **add any comments** (optional), and **acknowledge receipt** of the final review by checking the box and clicking on **Save**.

Tour of the XPM Home Page – CED View

The screenshot shows the XPM Home Page in the CED View. At the top, there is a navigation bar with 'One Stop Shop' and links for 'ERS' and 'Feedback'. Below this, a breadcrumb trail shows 'Home', 'Career Ladder', 'Title Promotion', 'XPD', and 'XPM'. The main content area is titled 'Extension Performance Management' and 'My Performance Evaluation: 2021-2022'. On the left, there is a sidebar with 'Evaluations' and sub-items: 'Institutional Goals', 'Performance Goals', and 'Programs'. The main content area features a large blue card titled 'Create Your 2021 XPM Evaluation' with a sub-header 'Matching Performance Goals and Professional Development Plans from last year will be included automatically.' and a 'Cleveland (100%)' status. Below this is a 'Create Evaluation' button. To the right of the card is a 'Past Evaluations' button. Below the card, there is a section for 'Supervised Employees' with 'Evaluation Year: 2021-2022'. This section contains a table with columns: 'CLEVELAND', 'STATUS', 'PERF. GOAL STRATEGIES', 'PD GOAL STRATEGIES', 'MIDYEAR', and 'ANNUAL'. The table lists three employees: 'A. ekon ancy (n' ysi', 'Gc y, Chz (jcgoc', and 't .s, iell (i. n'. The first employee's status is 'Submitted'. To the right of the table is a '7' icon. A '2' icon is located in the top right corner of the page.

1 - Select from the list of options to see a list of the current year **Institutional and Performance Goals** and their descriptions

2 - Select the **HELP question mark** to open the XPM website and find answers to questions about the XPM process

3 - **Create** your current year draft Evaluation Plan to submit to your DED for review

4 - Select the **Past Evaluations** button to view prior year performance evaluations

5 - Click an Agent's name to enter their **current year XPM** evaluation plan

6 - Review the **status** of an Agent's current year's evaluation

7- View an Agent's **prior evaluations**

Modifying and Approving the Annual Performance Plan

1. As a supervisor, you will receive an **email notification** from the XPM system after an employee submits a draft XPM performance plan for your approval.
2. **Review** the draft strategies and professional development plan. Click on **Edit** and make any necessary modifications to the draft strategies or the draft professional development plan. Click **Save** after each text box edited.
3. After making all necessary edits or if the plan was satisfactory as submitted, click on the **Approve** button.

and local decision-makers. Articulate what Extension is, who we serve, and the key impacts of Extension programs to county leadership, members of the community and stakeholder groups. Intentionally market the ability to accommodate the needs of people with disabilities and clients who have a limited ability to speak or read English.

Strategies:

B **I** **Link** **Bulleted List** **Numbered List** **Indent** **Outdent** **Undo** **Redo**

change the strategy

Cancel **Save**

Evaluation Details

Status
Submitted

Performance Goals **Link**
✓ defined

PD Activities **Link**
✓ defined

SUPERVISOR OPTIONS

Approve

Goal: **Program Planning:** Plan comprehensive research-based educational programming that addresses identified local issues.

Description: Work with program advisory committees, clientele, underserved audiences and other stakeholders to identify and prioritize local issues and educational needs. Develop a comprehensive Extension program using a program planning framework. Use Extension developed or approved curricula, Extension publications and other research-based content appropriate for the intended audiences or work with campus Specialists to adapt or identify content as needed. Review programming to ensure it meets Extension program policies including

History

a minute ago
submitted for approval by

5 days, 4 hours ago
evaluation created by

The Mid-Year Review

1. When it's time for the interim review, click on the **Midyear Review** button, enter midyear review **comments**, then click the **Save** button.

2. Next, click on the button to **Request Signature** from the employee.

3. Once the employee digitally signs the midyear evaluation, you will receive an email notification to re-enter the XPM system and digitally sign the midyear evaluation to finalize the midyear review process. Click the **Add Supervisor Signature** button, **check the box** to digitally sign, and click **Save**.

The Final Review

1. When it's time for the final review, click on the **Annual Review** button, enter annual review **comments** and an **overall rating**, then click the **Save** button.

employee's performance on established goals, as well as other expectations communicated during the cycle.

Overall evaluation information will not be visible to the employee until their signature is requested.

Date of Review: 07/05/2021

Supervisor Comments: annual review comments

Overall rating: Exceeding Expectations

Cancel Save

SUPERVISOR OPTIONS

Annual Review

History

now midyear evaluation supervisor signed by [name]

55 seconds ago midyear evaluation signed by [name]

a minute ago

SIGNATURES FOR ANNUAL PERFORMANCE EVALUATION

2. Next, click on the button to **Request Signature** from the employee.

Overall Comments/Signature requested from [name]

Date of Review: July 5, 2021

Supervisor Comments: (Required) annual review comments

Employee Comments: (Optional)

OVERALL RATING

As part of the annual evaluation, supervisors select the rating that best describes the employee's overall performance during the entire performance cycle, as defined below.

- Exceeding Expectations:** Routinely performs above expected performance of assigned duties and is generally considered among the highest performing employees within the work unit.
- Meeting Expectations:** Generally performs at, and on occasions may exceed, a successful level of performance of assigned duties.
- Not Meeting Expectations:** Often performs below an acceptable level of performance of assigned duties or has demonstrated substantial performance deficiencies in certain assigned duties.

EXCEEDING EXPECTATIONS X MEETING EXPECTATIONS NOT MEETING EXPECTATIONS

SUPERVISOR OPTIONS

Annual Review

Request Signature

History

now overall employee signature requested by [name]

58 seconds ago midyear evaluation supervisor signed by [name]

SIGNATURES FOR ANNUAL PERFORMANCE EVALUATION

3. Once the employee digitally signs the annual evaluation, you will receive an **email notification** to re-enter the XPM system and digitally sign the evaluation to finalize the annual review process. Click the **Add Supervisor Signature** button, **check the box** to digitally sign, and click **Save**. **Print** a copy of the digitally signed performance review to be included in the **employee's personnel file**.