

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

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

GOALS AND OBJECTIVES

At the beginning of the performance cycle, review the Extension goals and descriptions that are based on key business needs and strategic initiatives and set individual strategies for accomplishing each goal.

Goal:	Program Planning: Plan comprehensive research-based educational programming to address 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 issues of branding, programs with minors, copyright infringement, Americans with Disabilities Act (ADA) inclusion, use of the non-discrimination statement and accommodation statement, limited English proficiency requirements, etc.
Set Individual Strategies for Performance Cycle	

Goal:	Program Delivery: Deliver research-based programs and services using varied educational strategies and teaching methods to help clientele solve complex problems and implement appropriate research-based strategies.
Description:	Deliver timely and relevant educational information. Use new and emerging technologies, appropriate equipment, and devices to offer learning in interactive and appropriate ways. Collaborate with Area Specialized Agents, Extension Specialists and community partners to address clientele needs, implement educational programs and/or secure resources or funding. Build and maintain a volunteer system for the delivery of Extension programs. Provide targeted outreach to reach new or underserved audiences. Provide a learning environment that supports diverse populations.
Set Individual Strategies for Performance Cycle	

Goal:	Evaluation: Use appropriate evaluation methods and tools to improve effectiveness and quality of teaching methods, and to evaluate program outcomes and impacts.
Description:	Measure quality and outcomes of programs. Report the impact of program efforts to program advisory committee and other stakeholder groups. Submit complete and accurate accountability reporting data by established deadlines. Annually review and analyze program participation data and proactively address outreach opportunities to underserved audiences. Review evaluation data to ensure programs are meeting the educational needs of the community.
Set Individual Strategies for Performance Cycle	

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 availability and benefits of Extension programs and services to potential participants, volunteers, members of the community, local decision-makers, partners, and other stakeholders to increase program support and participation. Intentionally market programs to underserved audiences; promote our policy of accommodating the needs of people with disabilities and serving LEP individuals. Manage a program advisory system to communicate the value and impact of Extension programs to members of the community, underserved audiences, stakeholders and decision-makers and assist with attracting new audiences, fundraising, and supporting Extension efforts.
Set Individual Strategies for Performance Cycle	

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.

Set Professional Development Activities for Performance Cycle

MIDYEAR PERFORMANCE EVALUATION

At the midpoint of the performance cycle, conduct a coaching session with the employee to review the employee's performance on established goals, as well as other expectations.

Supervisor Comments	Provide Midyear Performance Feedback
Employee Comments	

ANNUAL PERFORMANCE EVALUATION

At the end of the performance cycle, conduct an annual review with the employee in order to assess the employee's performance on established goals, as well as other expectations communicated during the cycle.

Supervisor Comments	Provide Summary of Annual Performance
Employee Comments	

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		MEETING EXPECTATIONS		NOT MEETING EXPECTATIONS	
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