

## Performance Review Process Job Aid

This job aid is intended to be a guide to assist Area Leaders (AL) through the performance review (PR) process with the assistance from Extension Operations staff including the Director and Assistant Director of Operations and the Administrative Support.

### December

- Documents solicited from educators with deadline of **January 15**
  - **Documentation should be submitted directly to the Admin Support**
    - Educators are required to submit: Annual Report, Peer Review letter, EEET (3-5 year summary)
    - Program staff are required to submit: Annual Report (*program staff who are conducting programming should also have a EEET Summary*)
    - All other staff are required to submit: Progress report on goals, goals for upcoming year
- Date scheduled for calibration of support staff which will be held in January. **Performance reviews will NOT be presented to support staff until after the calibration meeting.**
- ALs begin to hold dates for PRs for support staff (starting in January)

#### Action Items:

- Learning and Organizational Development (LOD) will send an email to All Extension with information about VITA training and required documents that need to be submitted by January 15
- Admin Support will send a follow up message on behalf of the ALs with info to send the requested documents to the appropriate Admin Support
- Admin Support requests up-to-date list of employees by Area from HR
- Admin Support creates annual PR folder for each employee within Area Leader PR Files in BBox
- Asst Dir of OPs announces date in January with ALs to review support staff calibration
- AL begins to hold dates for PRs for support staff in January following calibration
- Admin Support begins to populate PR templates for support staff. <https://extops.cfaes.ohio-state.edu/performance-management/performance-reviews>

### January

- Date scheduled for calibration of program staff which will be held in February. **Performance reviews will NOT be presented to program staff until after the calibration meeting.**
- ALs begin to hold dates for PRs for program staff (starting in February and finishing by the end of April)

#### Action Items:

- Admin Support will send a reminder message about required documentation deadline on behalf of the ALs
- Calibration zoom held to discuss support staff PRs, facilitated by Asst Dir of OPs with all ALs
- Asst Dir of OPs announces date in February with ALs to review program staff calibration
- ALs begin to hold dates for PRs for program staff (after calibration) start in Feb. and complete by the end of Apr.
- Admin Support will make sure all documentation are received and will upload the information into BBox for use by the appropriate AL. Reminders will be sent to staff who have not met the deadline.
- Debby Lewis coordinates the distribution of the EEET Summary. Admin Support contact her regarding expected receipt date and follows up with the reports that are missing.
- Admin Support will begin to populate appropriate PR templates for program staff, populating portions with the documentation submitted by January 15.
- ALs will begin to hold dates for PRs (February through April). ALs share these dates with Admin Support for their assistance in scheduling meetings (preferred location of meetings, length of meetings)
- Asst Dir of OPs will confirm with department chair the faculty PR process for the current year and share details with the ALs (*see Faculty Performance Review Aid*)



## February

- PR documents will be written by the AL **for all staff** in their respective area regardless of position or FTE appointment (with the exception of SNAP-Ed and EFNEP employees)

### Action Items:

- Calibration zoom held to discuss ratings of program staff, facilitated by Asst Dir of OPs with all ALs
- ALs will prepare drafts of PRs with tentative ratings and finalize after calibration. Information will be uploaded back to BBox.
- Admin Support will finalize population of PRs for educators using data received from documentation submitted. Sections completed will include:
  - Page 1 (employee info, check in meetings, performance review and planning)
  - Part IA – Progress on goals (Progress on Performance Goals copied from Section 1 of annual report and Progress on Professional Development Goals from Section 6 of annual report)
  - Part IB1 – Extension Teaching, Program Delivery, and Curriculum Development (from EEET 3-5 year summary; see previous year's performance review for sample wording)
  - Part 1B3 Service (copied from previous year's performance review so it can be quickly edited by Area Leader)
- Admin Support will finalize the schedule of the PR meetings and will send out confirmations to participants if requested
- Admin Support will proof document prior to AL presenting them to the employee (if requested by the AL).
- ALs start to conduct PRs with educators following calibration

## March

### Action Items:

- ALs continue to conduct PRs
- NOTE: If educator is going for promotion, their PR may need to be completed earlier

## April

### Action Items:

- ALs finish conducting PRs
- ALs provide Admin Support with all signed PRs
- Admin Support will scan final documents and upload into BBox
- Admin Support will send the scanned final PR for all staff to CFAES HR through [faes\\_humanresourcesonbaseforms@osu.edu](mailto:faes_humanresourcesonbaseforms@osu.edu)

## May-June

- The Dir of OPs will submit salary recommendations to CFAES HR
- Options for possible bonuses are determined at the College and University level and, if available, input on these bonuses will be requested at the appropriate time

### Action Items:

- Admin Support will summarize all ratings into a spreadsheet for AMCP review
- The Dir of OPs will submit salary recommendations to CFAES HR with the assistance of the Asst Dir of OPs and input from the ALs

## August

- If needed, the ALs will conduct fall visits with all staff. This is an opportunity to review goal setting for the upcoming year.

### Action Items:

- If needed, ALs will set Fall Visit dates. Assistance can be provided by the Admin Support to schedule these meetings.



## September

### Action Items:

- Dir of OPs will provide the final/approved salary info to the respective ALs when received from CFAES HR
- ALs will receive salary letters for all staff in their respective areas
  - These letters will be signed through DocuSign
  - The AL will provide a copy of the salary letter to all staff

## October and November

### Action Items:

- ALs will continue to perform Fall Visits if needed

