



Best Practices for Lead Educators

PERFORMANCE MANAGEMENT & STAFF EVALUATIONS

The success of local offices, and all of Extension, is a direct result of the daily contributions of every employee. The performance management and staff evaluation process help employees succeed by ensuring that right goals are set, there is an alignment among expectations, and encourage ongoing communication between employee and manager.

University Paid Assistants & Staff

- Required to have **TWO** conversations a year.
- Utilize the Trakstar Perform system.

County Paid Assistants & Staff

- Expected to have **ONE** conversation a year but recommended to have **TWO** conversations a year.
- Utilize county evaluation documents, if no county document exists utilize either the *IANR Performance Management Conversation* or *NU Values Employee Assessment* document.

Temporary and On-Call staff are exempt from this process.

Window to Host Conversations

✓ January 15 – March 15

✓ September 15 – November 15

Lead Educators are responsible for preparing for and conducting the conversation which provides constructive feedback and supports the employee's development; ensuring conversation is conducted fairly and consistently; and placing documentation into the employee's personnel file.

Employees are responsible for participating actively in the conversation; setting attainable goals; and seeking support as needed.

PREPARING

- **Review Past Performance:** Examine past evaluation documents, review PEARS reporting (if applicable), and read employee provided annual evaluation reports (if applicable) to gain a comprehensive view of the employee's performance.
- **Set Objectives:** Define clear goals for the conversations. Aim to highlight an employee's accomplishments, areas for growth, and future goals/objectives.
- **Gather Feedback:** Collect formal and informal insights from peers, and stakeholders.

SCHEDULING

- **Timing:** Schedule evaluations at least two weeks in advance and conduct them once or twice per year (as required).
- **Notification:** Inform the employee about the upcoming evaluation, allow them to pick the date, and provide preparation materials in advance to encourage meaningful discussion.

CONDUCTING

- **Create a Comfortable Environment:** Hold conversation in a private and relaxed setting to foster open communication.
- **Start with Positive Feedback:** Begin with strengths and accomplishments to establish the tone.
- **Use Structured Discussion:** Utilize the provided open-ended questions or craft your own.
- **Provide Specific Examples:** Use concrete examples to illustrate feedback and make suggestions actionable.
- **Set SMART Goals:** Collaborate with the employee to develop SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals for the next evaluation period.
- **High Performer:**
 - **Discuss strengths:** Deep dive into their specific strengths and areas of expertise, understanding what makes them successful and what drives them.
 - **Challenge them further:** Set ambitious goals which align with their strengths and interests, providing them with stimulating new challenges.
 - **Seek feedback:** Ask for their feedback on the team dynamics, work environment, and areas where they feel they can contribute more.
- **Low Performer:**
 - **Focus on specifics:** Clearly outline the areas where performance needs improvement, providing concrete examples of issues and behaviors.
 - **Collaborative problem-solving:** Engage in a dialogue to understand the underlying reasons for their performance issues, exploring potential obstacles and solutions.
 - **Set achievable goals:** Establish clear, measurable goals with a defined timeline and regular check-ins to track progress.
 - **Offer support and training:** Identify necessary training or resources to help them develop the skills required to meet expectations.

DOCUMENTING

- **Summary:** Summarize the key points of the conversation, including accomplishments, goals, and areas for improvement.
- **Trakstar Perform System:** Enter the summary and any agreed-upon goals into the Trakstar Perform system (if applicable).

FOLLOWING-UP

- **Regular Check-Ins:** Schedule regular check-ins to monitor progress and provide ongoing support. This helps in maintaining momentum and addressing any issues promptly.
- **Adjust Goals as Needed:** Be flexible and adjust goals as necessary based on the employee's progress and any changes in organizational priorities.

ADDITIONAL QUESTIONS

Review of Key Responsibilities and Achievements

- Outline your main responsibilities and how you feel you've managed them?
- What is your priority this month?
- What are some of the key achievements you're most proud of since our last review?
- What went well this past month? What was your biggest accomplishment this month?
- How are you handling your workload?
- How is your work-life balance?

Strengths and Areas for Improvement

- What do you consider your greatest strengths in your role as an Office Manager or Assistant?
- Are there any areas where you feel you could improve or need additional support?
- What resources would help you succeed in your role?

Professional Development and Goals

- Are there any skills or areas of knowledge you'd like to develop further?
- What goals would you like to set for the next review period?

Addressing Challenges and Solutions

- Are you blocked on anything?
- What challenges have you encountered in your role, and how have you addressed them?
- What is your biggest challenge right now?
- Is there anything you need from me or the organization to help you overcome these challenges?
- What's something we can improve in this office?
- What is something you can start, stop, and/or continue doing?

General

- What else would you like to talk about?

SUGGESTED HIGHLIGHTS FOR HIGH PERFORMERS & CHALLENGES FOR LOW PERFORMERS

- **Time Management:** Balancing multiple tasks and deadlines can be overwhelming. Prioritizing tasks effectively is crucial.
- **Communication:** Ensuring clear and effective communication with colleagues and clients can be challenging, especially when dealing with different communication styles.
- **Problem-Solving:** Quickly resolving unexpected issues or last-minute changes requires good problem-solving skills and adaptability.
- **Workload:** Managing a heavy workload, especially during busy periods, can lead to stress and burnout if not handled properly.
- **Interpersonal Skills:** Navigating office politics and maintaining positive relationships with colleagues and supervisors can be challenging.
- **Attention to Detail:** Ensuring accuracy in tasks such as data entry, scheduling, and document preparation is essential but can be demanding.