

Self-Initiated Performance Review (SIPR) Process for Cooperative Extension Colleagues (Edited January 2016)

Introduction

"Self-directed people—those who see themselves as responsible for their behavior and performance—want to be held accountable. They have a sense of ownership in their job, want input into how things should be done and have a say in how their performance will be measured."¹

Research shows that performance reviews are the most powerful tool for improving performance. One of the most important factors affecting employees' engagement, and thus employees' productivity and effectiveness, is knowing what is expected from them at work. Formal development conversations, coaching and feedback need to occur regularly to ensure that expectations are clear.

Components of the Performance Review Process

Cooperative Extension's performance review process is known as a self-initiated performance review (SIPR) because each employee is expected to initiate and fully participate in an annual performance review. The three components include reflecting on feedback from others, preparing a written document and participating in a performance conference. These components should be included in every office/unit's performance review process. However, each office/unit may decide the format of the written document that is used. Wisconsin Nutrition Education Program (WNEP) employees are asked to follow the forms and steps that are found at: www.uwex.edu/ces/wnep/train/prevgdln.cfm.

¹ Ayers, Keith (2005). *Creating a Responsible Workplace*. HR Magazine, February 2005, page 111

Employees in university staff (formerly classified staff) positions are encouraged to incorporate these components into their annual performance review process and to follow these steps as applicable to their positions.

1. Reflect on Feedback and Work Performance

- a. Extension colleagues are asked to reflect on the performance feedback they have received from multiple sources during the past year.
- b. People who may have provided feedback during the past year include program directors, program area liaisons, assistant program directors, clientele, program partners, advisory committees, volunteers, office colleagues, program team colleagues, county extension committees, regional directors, supervisors and others.
- c. You are encouraged to use existing processes as part of your reflection, such as peer reviews, mentors, and one, two, or three year reviews, as applicable to your position. You may also choose to reflect on your annual accomplishments report as a measure of your performance.
- d. Use the feedback to reflect on and analyze your own performance. This reflection is a critical skill and will be useful to you as you continue your career. Use your reflections to prepare a written document.

2. Prepare a Written Document

Extension colleagues are expected to initiate the preparation of a written performance document. A completed written document includes written feedback from the office/unit administrative leader. The written document should be signed by you and the office/unit administrative leader. By signing the document, you are indicating that the material has been shared with you. The completed written document will be filed in your permanent personnel file. A completed written document includes, at a minimum, items a.-g.

- a. Accomplishments. Briefly highlight the impact of your professional contributions this past year. Include success stories and other impacts from your various roles, including administrative. It is not necessary to include samples of materials developed. What are the ways in which you strengthened your performance?
- b. External Relationships. As applicable to your position, share examples of your work in building productive relationships with external collaborators, partners, and elected officials. Include marketing and mass media efforts.
- c. Internal Relationships. Describe your contributions in working with office/unit colleagues to build a productive, respectful workplace. As applicable to your position, describe your contributions to Extension program teams.
- d. Valuing Differences. Describe how you are investing yourself in helping the organization achieve its goal of becoming more inclusive and diverse. As applicable to your position, describe examples of your programs that reach diverse audiences and your efforts to recruit a diverse workforce.
- e. Feedback. What did you learn from feedback you've received this year? This feedback is for your professional development. How will you adjust your work goals to incorporate the feedback that you received? You are also asked to share some information about the kinds of groups/people who provided feedback to you and the ways in which you found this feedback helpful.
- f. Future Goals, Program Priorities and Plans. Briefly state your goals, program priorities and plans for the coming year. How did you identify these priorities and develop your plans? Share additional resources, such as individual plans of work, that are needed to conduct programs effectively.
- g. Professional Development Needs. Identify your specific professional development needs for the next year. Describe how these professional development needs relate to the priorities identified. What core competencies need strengthening? Review the list of core competencies for Extension professionals at <http://www.uwex.edu/ces/nco/competencies.cfm> and use those that are applicable to your position.

3. Participate in a Performance Conference
 - a. Performance conferences are conducted annually with the administrative leader for your office/unit, including department head/county director; regional director; dean/associate dean; nutrition coordinator; program director; or unit supervisor.
 - b. The performance conference is a time to share your successes and identify the areas where you need additional support. You may wish to show samples of your work during this conference. During the conference, verbal feedback is shared. Following the conference, this feedback is summarized in a written document by the administrative leader and attached to the written document you have prepared.
 - c. When there is a disagreement on the content of the written document and feedback, the administrator with oversight for the office/unit will intervene in the discussion.
 - d. If resolution is not reached, the Dean or Associate Dean will be asked to provide additional mediation.

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