

Annual Reporting and Planning Instructions For County-Based Faculty and Administrative Professionals January 2009

The instructions that follow cover the timeline for the 2008 annual review process with guidance on submitting annual reports into WORQS as well as preparing and submitting Individual Plans of Work for 2009.

Schedule for Reporting, Planning, and Annual Reviews

- January 16, 2009: Annual reports of all activities and accomplishments in 2008 should be entered into the WSU Online Review and Query System (WORQS) – <https://cahedb.wsu.edu/WORQS/login.aspx>. This is an expectation of the job. Please plan your time appropriately to meet the January 16 deadline.
- January 16, 2009: Submit 2008 WORQS Report Summary, updated vitae, updated position description, and 2009 Plans of Work to local County Director and the District Director. All documents must be submitted electronically. County Directors have the option of requiring paperwork to be submitted before the January 16 deadline.
- January 19-30: County Directors will schedule meetings during this time period to conduct annual reviews of County Faculty and Administrative Professionals. County Directors have the option of scheduling annual reviews before the January 19-30 timeframe.
- February 2 - February 13: County Directors will draft an evaluation statement on each faculty member and AP, and submit the evaluation statements to their District Director by email no later than February 13.
- February 16 – March 6: District Directors will meet with County Directors and others that they directly supervise to conduct annual reviews. During the meeting County Directors will discuss the performance and recommendations for merit ratings for those under their supervision.
- March 20: District Directors will have completed annual review statements on County Directors and posted annual review documentation for all faculty and AP's on the district on the Share point site.
- March 24-26: Extension Administrative Team meets to discuss all personnel accomplishments and merit ratings to ensure equity across the state. District Directors will finalized statements and merit ratings based on discussions.
- March 27: Finalized evaluation statements and merit ratings will be sent to each County Director for signatures. Individuals under review may write statements objecting to the evaluation statement or the merit rating given. This statement will be attached to the final annual review statement.
- April 10: All evaluation statements must be signed and returned to the District Director.
- April 17: All annual review materials are due to the Extension Dean and Director's Office.

- April 20 to May 8: Response to rebuttal statements. Within fifteen working days a letter of response will be written and signed by the Dean and returned to appropriate County Faculty or AP and copied to District Directors.
- May 1: All Annual Review materials due to the Provost

Annual Review Process

- County Faculty and AP annual review sessions will be scheduled by the County Director and should be completed in 60 to 90 minutes per annual review. These scheduled sessions should be held between January 19 and 30, 2009. County Directors have the option of scheduling annual evaluations before the January 19 to 30 timeframe.
- District Directors will similarly schedule meeting with County Directors for annual review and to discuss the annual evaluations of personnel in their offices. County Directors are expected to email draft annual evaluation statements for each Faculty member and AP under their supervision to the District Director no later than February 13.
- Documents used in the annual review process include the WORQS Summary Report, Vitae, Plans of Work for next year, and Position Description. Using these and other supplemental materials the evaluation will focus on:
 - Assessment of Program Accomplishments
 - Quality of work and outcomes measured
 - Assessment of professionalism as described in the professional behaviors matrix found at <http://ext.wsu.edu/admin/PDF/Matrix.pdf>
 - Assessment of the Plans of Work developed for the coming year
 - Review of the position description for consistency with the work done and plans for the coming year.

A Washington State University document called “Policies and Procedures for Evaluating Tenure-track Faculty Members: Tips for Faculty Members, Mentors, Department Chairs, and Deans” (August 2005) is available on the Provost Web site under Manuals and Forms http://provost.wsu.edu/manuals_forms/index.html This document is useful to faculty because it describes what to expect in the process, including a helpful checklist.

Annual Report Entry into WORQS (WSU Online Review and Query System)

WORQS <https://worqs.wsu.edu> is the WSU web-based, standardized faculty annual review form. To access WORQS you will need a WSU Network ID and password. If you do not have a network ID see <http://www.wsu.edu/Nid/> . You may also call 509-335-3663 and choose option #2 from the phone menu options.

Following successful login you will click on the “2008 Annual Review” button to begin entering your information. A help link is provided to assist you in navigating the report interface for the first time. The categories for entry are self explanatory, and the annual review section includes:

- Teaching
- Scholarly Activities

- Funding and Research
- Outreach
- Goals, Progress, and Honors
- Workplace
- Professional Development and Membership
- Supervision

Extension Faculty will not necessarily complete all of the elements in each section. Choose only those sections that apply to you. For example “teaching” in this case only applies to those with resident instruction assignments. Extension Faculty teaching efforts will be recorded under the “outreach” section. Please note that when you click on “outreach impacts” the system will query you if this is a WSU Extension Report. Check the YES box and the system will reconfigure the interface for our needs to document multi-state and integrated programs.

Special Note on the Goals Section of WORQS:

Most of the subsections in the menu are self explanatory, but one section does need specific clarification for Extension. The “goals” section is NOT for entering your Plan of Work for the coming year. Plans of Work are not entered into the WORQS system, and will be explained later in these instructions. Under the “goals” section please identify 2 or 3 professional behavior goals that you plan to work on during the coming year. (Program, Leadership, Communication, Organization, Professional Development, and Diversity are the six professional behavior categories.) You are required to select “diversity” as one of these goals. Consult the professional behaviors matrix at <http://ext.wsu.edu/admin/PDF/Matrix.pdf> . Select 2 or 3 professional behaviors from the matrix and write a short goal statement on each that you want to set for yourself over the coming year. You will be asked to report on your progress in achieving these goals the following year.

The “print & tools” section will allow you to select and order the components of your report, and then save and print out the complete report to submit to your supervisor.

Annual Plans of Work

The purpose of an annual planning process is to encourage Extension professionals to pause in their effort to “do good work” to review and, if needed, refocus their programs so they will result in positive impacts. Great effort goes into Extension programming; human and financial resources are expended. Therefore, Extension professionals must be able to answer the “so what” question when they report their accomplishments. WSU Extension has chosen the “logic model” as the tool for planning to achieve desired outcomes.

The expectations for planning in the 2009 calendar year are as follows:

- All county faculty and administrative professionals who are responsible for programming are expected to do annual planning for their primary projects that are directly related to the goals and initiatives included in the WSU Extension Strategic Framework <http://ext.wsu.edu/Framework.pdf> . County Directors and

team leaders may request that faculty/staff share their plans to facilitate coordination of program efforts within counties or within teams.

- A Plan of Work template is the tool of choice for developing Annual Plans of Work. The categories listed on the template for planning are consistent with the Strategic Goals and Initiatives found in the WSU Extension Strategic Framework located at <http://ext.wsu.edu/Framework.pdf> . Plans of Work **will not** be entered into the WORQS system, but will be submitted directly to your supervisor with other annual review materials as required in the annual review schedule.
- Use a separate template for each of the major projects that you plan for the year, and develop the plan with intended outcomes that support one or more of the goals in our strategic framework. Simply download the Plan of Work Template and guidelines (Required Reports section) at <http://ext.wsu.edu/admin/> .

Remember to complete your WORQS data entry by January 16 and submit your WORQS Summary, 2009 Plans of Work, Updated Vitae, and Current Position Description to your supervisor by January 16, 2009. Questions on the annual reporting and review process may be directed to the appropriate District Director.