Today’s Learning Objectives

- Three “Building Blocks” of performance management
- Components of well-written job descriptions
- Essential functions of a sample job description
- Effective performance expectations
- Phases of productive review meetings
It is important for employees to clearly understand their roles.

Advantages of Position Descriptions

Employee Communication Supervisor

Position Description Defined

- A summary of scope of authority and responsibility.
- A statement of principal duties and functions.
- Specific to the needs of the department (Not to the employee)
Position Descriptions – Nuts and Bolts

Details
Performance Expectations
Duties
Position Description
Essential Competencies
Supervisor / Lead
Qualifications

Position Descriptions - Classification

**Civil Service**
Must be consistent with the State Department of Enterprise Services Class Specifications for the classification.

**Administrative Professional**
Must comply with the State of Washington exemption definitions RCW 41.06.070 and WSU Benchmarks.
Position Descriptions

Performance Expectations

Success in my positions requires:

Performance Expectations

A statement of the result an individual employee will achieve when he/she is doing a job satisfactorily.

- position description = “what”
- performance expectations = “how well”
### Expectation Criteria

<table>
<thead>
<tr>
<th>Civil Service:</th>
<th>Administrative Professional:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Quantity of Work</td>
<td>• Productivity</td>
</tr>
<tr>
<td>• Quality of Work</td>
<td>• Quality of Work</td>
</tr>
<tr>
<td>• Job Knowledge</td>
<td>• Interpersonal Skills</td>
</tr>
<tr>
<td>• Working Relationships</td>
<td>• Optional Factors</td>
</tr>
<tr>
<td>• Other Criteria</td>
<td></td>
</tr>
</tbody>
</table>

### Performance Expectation Categories

- **Expectations for Civil Service employees must** include:
  - Unsatisfactory
    - Needs improvement
  - Satisfactory/meets expectations
  - Outstanding performance
    - Exceeds expectations
- **It is recommended that AP employees also have performance expectations.**

### Performance Expectations

- Consistent
- Realistically attainable
- Legally defensible
  - Valid
  - Free of bias
  - In compliance with applicable laws, regulations, WSU policy and procedures
It’s important to receive constructive and corrective feedback throughout the year.

Preparing for the Performance Review

- Prepare throughout the year
  - Know your EE Categories and performance expectations
  - Keep and review notes, goals, accomplishments
- Know what official forms and processes to use
- Understand / Identify criteria and ratings
**Performance Factors**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Performance Expectations: Comments and/or Examples</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Quality of Work</td>
<td>OUTSTANDING - Consistently produces error-free work. - Prepares excellent work in relation to neatness, clarity and presentation. - Always pays close attention to detail and confidentiality.</td>
<td>OUTSTANDING *</td>
</tr>
<tr>
<td>2. Quantity of Work</td>
<td>MEETS EXPECTATIONS/SATISFACTORY - Reviews workload daily. - Makes an effort to accommodate unanticipated or &quot;rush&quot; jobs. - Produces a large volume of error-free work during times of peak workloads.</td>
<td>OUTSTANDING *</td>
</tr>
<tr>
<td>3. Job Knowledge</td>
<td>UNSATISFACTORY - Poor working knowledge of university and department policies and procedures. - Poor technical knowledge of duties/responsibilities most primary to the position.</td>
<td>OUTSTANDING *</td>
</tr>
<tr>
<td>4. Working Relationships</td>
<td>OUTSTANDING - Always communicates well with others; easily approachable. - Always cooperative and maintains pleasant, courteous relationships. - Respectfully accepts supervision.</td>
<td>OUTSTANDING *</td>
</tr>
<tr>
<td>5. Supervisory Skills</td>
<td>**</td>
<td>OUTSTANDING *</td>
</tr>
<tr>
<td>6. Optional Factor</td>
<td>UNSATISFACTORY - Often late or absent from work. - Not available to assist others with rush jobs. - Does not work with supervisor to ensure office work is handled in a timely manner and is not aware of efficiency flow problems. - Does not let supervisor/manager know when it is necessary to be away from the office.</td>
<td>OUTSTANDING *</td>
</tr>
</tbody>
</table>

**Definitions of Performance Rating Categories**

- **OUTSTANDING** *— The employee has exceeded all of the performance expectations for this factor and has made many significant contributions to the efficiency and economy of this organization through such performance.*
- **EXCEEDS EXPECTATIONS** *— The employee regularly works beyond a majority of the performance expectations of this factor and has made significant contributions to the efficiency and economy of this organization through such performance.*
- **MEETS EXPECTATIONS** *— The employee has met the performance expectations for this factor and has contributed to the efficiency and economy of this organization.*
- **NEEDS IMPROVEMENT** *— The employee has failed to meet one or more of the significant performance expectations for this factor.*
- **UNSATISFACTORY** *— The employee has failed to meet the performance expectations for this factor.*

* Give specific examples of this employee's performance.
### Evaluation Policies

<table>
<thead>
<tr>
<th>Civil Services</th>
<th>Bargaining Unit</th>
<th>Administrative Professional</th>
<th>Faculty</th>
</tr>
</thead>
<tbody>
<tr>
<td>• WAC 357-37</td>
<td>• Collective Bargaining Unit Agreement</td>
<td>• AP Handbook</td>
<td>• Faculty Manual</td>
</tr>
<tr>
<td>• BPPM 60.55</td>
<td>• Some state No Performance Evaluations - Check Contracts</td>
<td>• BPPM 60.55</td>
<td>• BPPM 60.55</td>
</tr>
<tr>
<td>• REQUIRED</td>
<td>• Permanent EE’s - Annually (prior to PID)</td>
<td>• Calendar Year</td>
<td>• Calendar Year</td>
</tr>
<tr>
<td>• Probation or Trial Service – 6 months</td>
<td>• HRS</td>
<td>• May Use WORDS</td>
<td>• May Use WORDS</td>
</tr>
<tr>
<td>• May be postponed for 6 months</td>
<td></td>
<td></td>
<td>• Provosts Office</td>
</tr>
<tr>
<td>• May request cyclic reviews</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• HRS</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

“Wow, I’m so excited for my performance review today!”

- Said by no one . . . ever

https://www.youtube.com/watch?v=gdp4sPvIV74&feature=player_embedded
# Performance Review Meetings

## Purpose of Review Meeting

<table>
<thead>
<tr>
<th>Discuss review period</th>
<th>Future planning</th>
<th>Clarify ratings/expectations</th>
<th>Facilitate communication</th>
</tr>
</thead>
</table>

## Planning for the Meeting

<table>
<thead>
<tr>
<th>Coordinate in advance</th>
<th>Schedule appropriate amount of time</th>
<th>Review evaluation prior to meeting?</th>
<th>Talking points</th>
</tr>
</thead>
</table>

## During the Meeting

<table>
<thead>
<tr>
<th>Greet employee / put at ease</th>
<th>Start on a positive note</th>
<th>Discuss items and rating</th>
<th>Encourage input and participation</th>
</tr>
</thead>
</table>

## Closing the Meeting

<table>
<thead>
<tr>
<th>Summarize discussion</th>
<th>Confirm employees understanding</th>
<th>Summarize improvement plan(s) and/or goals</th>
<th>End positively</th>
</tr>
</thead>
</table>
Performance Review Reminders

- No surprises
- CS employees may appeal
  - alleged irregularities in forms and/or procedures, not content
- Written Rebuttal
- Employee signature:
  - indicates receipt of review – not agreement

Performance Review Pitfalls

- Biases
- Déjà vu
- Inflated Rating
- Gossip

Preparing for Next Year

- Periodically review goals
- Monitor progress in removing deficiencies
- For growth and development
  - Encourage employee
  - Provide an environment that allows for success
Summary

Building Blocks of Performance Management

- Current and accurate position description and performance expectations
  ⇒ Lead to useful and valid performance reviews.

Position Descriptions

Performance Expectations

Performance Reviews

Resources

- BPPM 60.55
- WAC 357.37
- Collective Bargaining Unit Agreements
- Administrative Professional Handbook
- Faculty Manual
- Visit HRS's web site to access a sample of Performance Expectations.
  - Go to www.hrs.wsu.edu, and click on Manager/Classification-Compensation
- Online Position Description System
  - www.wsujobs.com/hr
- HRS – www.hrs.wsu.edu
- Questions can be directed to HRS at 335-4521, or hrs@wsu.edu
If you attended this live training session and wish to have your attendance documented in your training history, please notify Human Resource Services within 24 hours of today's date:

hrstraining@wsu.edu