

WASHINGTON STATE UNIVERSITY



WSU Training for Developing Leaders


Position Descriptions, Expectations, and Annual Reviews

January 2016

WASHINGTON STATE UNIVERSITY

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



WASHINGTON STATE UNIVERSITY

Building Blocks of Performance Management



Building Block One – Position Descriptions

It is important for employees to clearly understand their roles.

Advantages of Position Descriptions

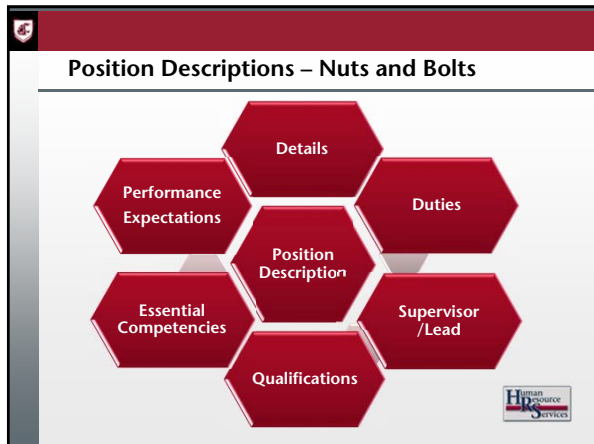
Employee **Communication** Supervisor

Human Resource Services

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)

Human Resource Services



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.

A small logo for "Human Resource Services" is in the bottom right corner.



Building Blocks of Performance Management

Position Descriptions

Performance Expectations

Building Block Two – 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

Civil Service:	<ul style="list-style-type: none"> Quantity of Work Quality of Work Job Knowledge Working Relationships Other Criteria
Administrative Professional:	<ul style="list-style-type: none"> Productivity Quality of Work Interpersonal Skills Optional Factors


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*

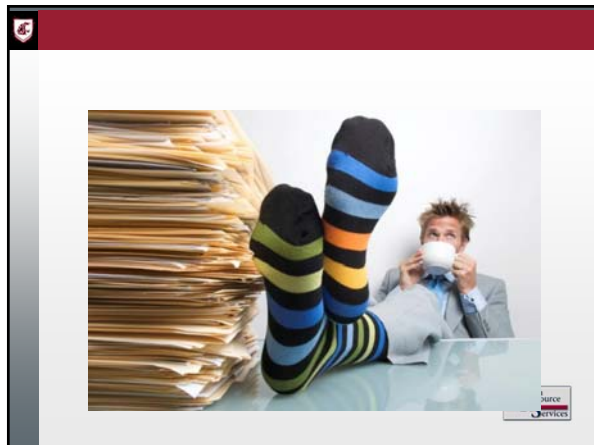


Performance Expectations


- Consistent
- Realistically attainable
- Legally defensible
 - ✓ Valid
 - ✓ Free of bias
 - ✓ In compliance with applicable laws, regulations, WSU policy and procedures











 **Building Block Three –
Performance Reviews**

**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**





EMPLOYEE PERFORMANCE EVALUATION

INSTITUTION/DEPARTMENT

See [60.55](#)

WSUID NO.

EMPLOYEE'S NAME	CLASSIFICATION TITLE	EVALUATION PERIOD FROM _____ TO _____	EVALUATION DATE
PERFORMANCE FACTORS	PERFORMANCE EXPECTATIONS: COMMENTS AND/OR EXAMPLES (ATTACH EXTRA SHEETS IF NEEDED)		RATING
1. QUALITY OF WORK COMPETENCE, ACCURACY, NEATNESS, THOROUGHNESS.	OUTSTANDING -Consistently produces error-free work. -Prepares excellent work in relation to neatness, clarity and presentation. -Always pays close attention to detail and confidentiality.		OUTSTANDING * EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY *
2. QUANTITY OF WORK USE OF TIME, VOLUME OF WORK ACCOMPLISHED, ABILITY TO MEET SCHEDULES, PRODUCTIVITY LEVELS	MEETS EXPECTATIONS/SATISFACTORY -Reviews work load daily. -Makes an effort to accommodate unexpected or "rush" jobs. -Produces a large volume of error-free work during times of peak workloads.		OUTSTANDING * EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY *
3. JOB KNOWLEDGE DEGREE OF TECHNICAL KNOWLEDGE, UNDERSTANDING OF JOB PROCEDURES AND METHODS	UNSATISFACTORY -Poor working knowledge of university and department policies and procedures. -Poor technical knowledge of duties/responsibilities most primary to the position.		OUTSTANDING * EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY *
4. WORKING RELATIONSHIPS COOPERATION AND ABILITY TO WORK WITH SUPERVISOR, CO-WORKERS, STUDENTS, AND CLIENTS SERVED.	OUTSTANDING -Always communicates well with others; easily approachable. -Always cooperative and maintains pleasant, courteous relationships. -Respectfully accepts supervision.		OUTSTANDING * EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY *
5. SUPERVISORY SKILLS TRAINING AND DIRECTING SUBOR- DINATES, DELEGATION, EVALUATING SUBORDINATES, PLANNING AND ORGANIZING WORK, PROBLEM SOLVING, DECISION MAKING ABILITY, ABILITY TO COMMUNICATE			OUTSTANDING * EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY *
6. OPTIONAL FACTOR	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.		OUTSTANDING * EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY *


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


Civil Services	Bargaining Unit	Administrative Professional	Faculty
<ul style="list-style-type: none">• WAC 357-37• BPPM 60.55• REQUIRED• Permanent EE's - Annually (prior to PID)• Probation or Trial Service – 6 months• May be postponed for 6 months• May request cyclic reviews• HRS	<ul style="list-style-type: none">• Collective Bargaining Unit Agreement• Some state No Performance Evals – Check Contracts	<ul style="list-style-type: none">• AP Handbook• BPPM 60.55• Calendar Year• HRS	<ul style="list-style-type: none">• Faculty Manual• BPPM 60.55• Calendar Year• May Use WORQS• Provosts Office


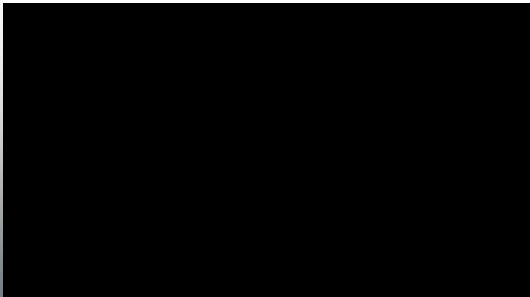




“Wow, I’m so excited for my performance review today!”

- Said by no one . . . ever







Performance Review Meetings

Purpose of Review Meeting

Discuss review period

Future planning

Clarify ratings/expectations

Facilitate communication

Planning for the Meeting

Coordinate in advance

Schedule appropriate amount of time

Review evaluation prior to meeting?

Talking points

During the Meeting

Greet employee / put at ease

Start on a positive note

Discuss items and rating

Encourage input and participation

Closing the Meeting

Summarize discussion


Confirm employees understanding

Summarize improvement plan(s) and/or goals

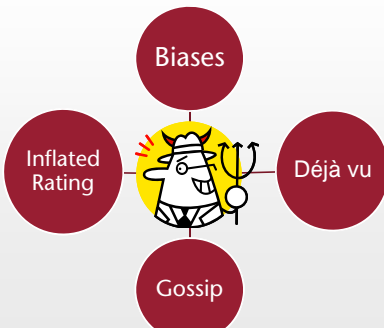
End positively

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




The diagram features a central cartoon character with a yellow face and a white body, holding a pen. Surrounding this character are four red circles, each containing a performance review pitfall: "Biases" at the top, "Inflated Rating" on the left, "Déjà vu" on the right, and "Gossip" at the bottom.



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



Human Resource Services

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



This has been a
WSU Training
Videoconference

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
