WSU Training for Supervisors

Position Descriptions, Expectations, and Annual Reviews

September 2016

Today’s Learning Objectives

• Describe the three “Building Blocks” of performance management
• Define the components of well-written job descriptions
• Identify the essential functions of a sample job description
• Develop effective performance expectations
• Describe the phases of productive review meetings

Building Blocks of Performance Management

Position Descriptions
Performance Expectations
Performance Reviews
Those who report to me clearly understand their roles.

Advantages of Position Descriptions

Communication

Employee

Supervisor

Position Descriptions – Nuts and Bolts

Details

duties

Performance Expectations

Position Description

Essential Competencies

Supervisor/Lead

Qualifications
Using the sample Job Description provided, identify:

✓ Essential job duties of the position
✓ Non-essential duties
✓ Required (minimum) qualifications
✓ Preferred qualifications

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

Building Block Two – Performance Expectations

Those who report to me understand what is expected to be successful in their positions.

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
Building Block Three –
Performance Reviews

Those who report to me receive constructive and corrective feedback from me 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
Evaluation Policies

**Civil Services**
- 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

**Bargaining Unit**
- Collective Bargaining Unit Agreement
- Some state No Performance Evaluations – Check Contracts

**Administrative Professional**
- AP Handbook
- BPPM 60.55
- Calendar Year
- HRS

**Faculty**
- Faculty Manual
- BPPM 60.55
- Calendar Year
- May Use WORDS
- Provost's Office

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

- Said by no one... ever

Performance Review Meetings

**Purpose of Review Meeting**
- Discuss rating period
- Provide planning
- Set expectations
- Facilitate communication

**Planning for the Meeting**
- Coordinate in advance
- Schedule appropriate amount of time
- Review evaluation plan in advance
- Talking points

**During the Meeting**
- Engage employee at a time
- Build on a positive note
- Discuss scores and rating
- Encourage input and participation

**Closing the Meeting**
- Summarize discussion
- Great termination
- Recap and reinforce key points
- 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

- Biases
- Inflated Rating
- Déjà vu
- 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

Summary:

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

Planning for Growth

Purpose of Review Meeting
- Discuss issues, concerns, and future planning
- Facilitate communication

Planning for the Meeting
- Coordinate in advance
- Schedule appropriate amount of time
- Review evaluation prior to meeting

During the Meeting
- Greet employee / put at ease
- Start on a positive note
- Discuss items and rating
- Encourage input and participation
- Ensure open and positive discussion

Closing the Meeting
- Summarize discussion
- Confirm employees’ understanding
- Summarize improvement plan(s) and/or goals
- End positively

Assign and monitor employee training:
hrs.wsu.edu/skillsoft