

WASHINGTON STATE UNIVERSITY




**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

Building Block One – Position Descriptions


Those who report to me clearly understand their roles.

Advantages of Position Descriptions



Employee **Communication** Supervisor

Position Descriptions – Nuts and Bolts




Performance Expectations
Essential Competencies
Qualifications
Supervisor /Lead
Duties
Details

Small Group Activity

Using the sample Job Description provided, identify:


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







 **Building Blocks of Performance Management**

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

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*

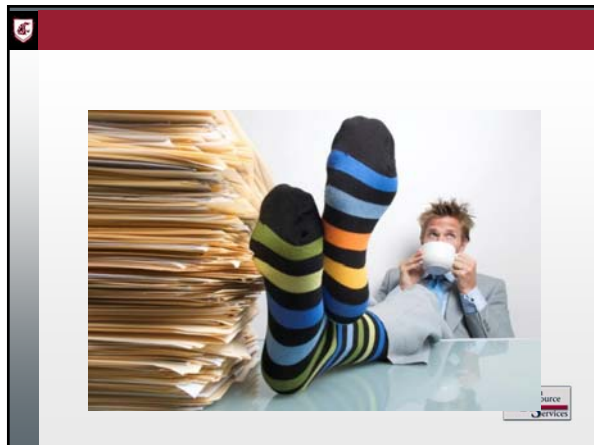


Performance Expectations

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










**Building Block Three –
Performance Reviews**

**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



WASHINGTON STATE UNIVERSITY

EMPLOYEE PERFORMANCE EVALUATION

EMPLOYEE'S NAME: _____ INSTITUTION/DEPARTMENT: _____

EMPL ID: _____ REVIEW NO: _____

CLASSIFICATION TITLE: _____ EVALUATION PERIOD: FROM _____ TO _____

PERFORMANCE FACTOR	PERFORMANCE EXPECTATIONS, COMMENTS AND/OR EXAMPLES (ATTACH EXTRA SHEETS IF NEEDED)	RATING
1. QUALITY OF WORK DEPENDENCE AND ACCURACY ADHERENCE TO PROCEDURES	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 WILLINGNESS TO ACCEPT ASSIGNMENTS COMPLETION OF ASSIGNMENTS	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 SOUND TECHNICAL KNOWLEDGE KNOWLEDGE OF UNIVERSITY POLICIES AND PROCEDURES	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 OTHERS RESPECTFULNESS	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 SUPERVISING SUBORDINATES DELEGATION OF RESPONSIBILITIES EFFECTIVE COMMUNICATION ABILITY TO MOTIVATE		OUTSTANDING EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY
6. OFFICIAL 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 his/her position and has significantly contributed to the efficiency and accuracy of the organization through quality performance.

EXCEEDS EXPECTATIONS - The employee has significantly exceeded the performance expectations of his/her job and has made significant contributions to the efficiency and accuracy of the organization through quality performance.

MEETS EXPECTATIONS - The employee has met the performance expectations for his/her job and has contributed to the efficiency and accuracy of the organization.


NEEDS IMPROVEMENT - The employee has failed to meet one or more of the performance expectations for his/her position.

UNSATISFACTORY - The employee has failed to meet the performance expectations for his/her position.

*Use specific examples of the 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

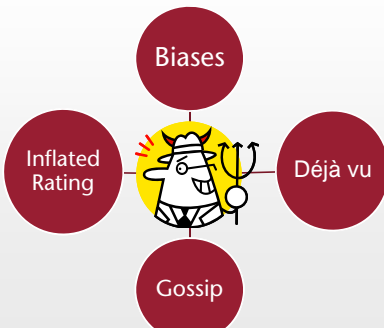
Purpose of Review Meeting			
Discuss review period	Future planning	Clarify ratings/expectations	Facilitate communication
Planning for the Meeting			
Coordinate in advance	Schedule appropriate amount of time	Review evaluation prior to meeting?	Talking points
During the Meeting			
Greet employee / put 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 crown, surrounded by four red circles containing the terms: Biases (top), Inflated Rating (left), Déjà vu (right), and Gossip (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 System-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

Planning for Growth Reminders

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 employee's understanding	Summarize improvement plan(s) and/or goals	End positively

Assign and monitor employee training:



hrs.wsu.edu/skillsoft