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

Building Blocks of Performance Management

Position Descriptions
Performance Expectations
Performance Reviews
It is important for employees to clearly understand their roles.

Advantages of Position Descriptions

• 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)
WASHINGTON STATE UNIVERSITY

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

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

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

- Expectations for Civil Service employees **must** include:
  - Unsatisfactory
  - 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
Evaluation Policies

<table>
<thead>
<tr>
<th>Civil Services</th>
<th>Bargaining Unit</th>
<th>Administrative Professional</th>
<th>Faculty</th>
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</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 Evals – Check Contracts</td>
<td>• BPPM 60.55</td>
<td>• BPPM 60.55</td>
</tr>
<tr>
<td>• REQUIRED</td>
<td></td>
<td>• Calendar Year</td>
<td>• Calendar Year</td>
</tr>
<tr>
<td>• Permanent EE’s - Annually (prior to PID)</td>
<td></td>
<td>• May Use WORDS</td>
<td>• May Use WORDS</td>
</tr>
<tr>
<td>• Probation or Trial Service – 6 months</td>
<td></td>
<td>• Provosts Office</td>
<td>• Provosts Office</td>
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<td>• May be postponed for 6 months</td>
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<tr>
<td>• May request cyclic reviews</td>
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<td></td>
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<td>• HRS</td>
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</tbody>
</table>

“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
- Evaluate performance
- Set goals
- Facilitate communication

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

**During the Meeting**
- Greet employee / put at ease
- Start on a positive note
- Discuss items and ratings
- Encourage input and participation

**Closing the Meeting**
- Summarize discussion
- Confirm employee 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

- 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](http://www.hrs.wsu.edu) and click on Manager/Classification-Compensation
- Online Position Description System
  - [www.wssjobs.com/hr](http://www.wssjobs.com/hr)
- HRS - [www hrs.wsu.edu](http://www hrs.wsu.edu)
- Questions can be directed to HRS at 335-4521, or hrs@wsu.edu

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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](mailto:hrstraining@wsu.edu)
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