

WASHINGTON STATE UNIVERSITY



**WSU Training
for Developing
Leaders**


Position Descriptions, Expectations, and Annual Reviews

October 5, 2017

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



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Building Blocks of Performance Management



Building Block One – Position Descriptions

It is important for employees to clearly understand their roles.

Advantages of Position Descriptions

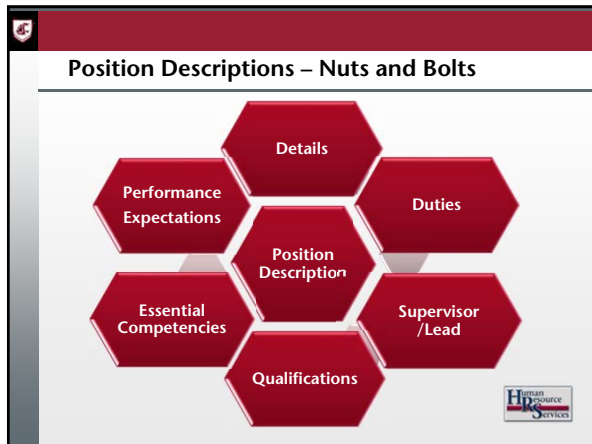
Employee → **Communication** ← Supervisor

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

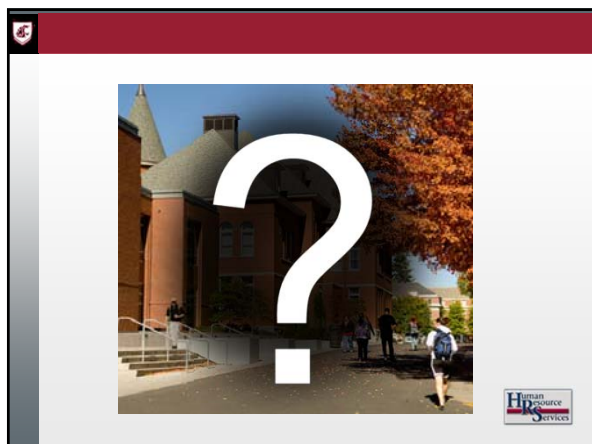



Position Descriptions - Classification

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.






 **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

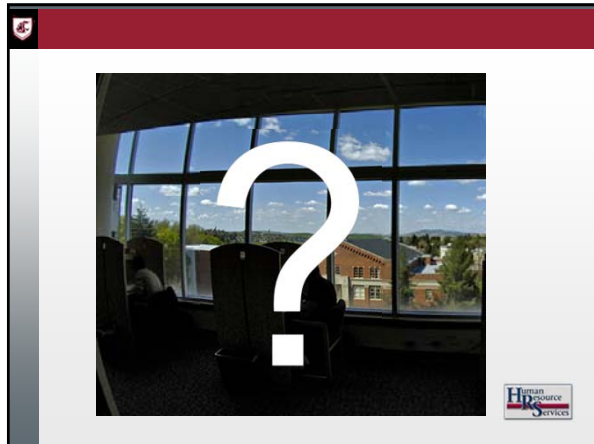
- Expectations for Civil Service employees *must* include:
 - ✓ Unsatisfactory
 - Needs improvement
 - ✓ Satisfactory/meets expectations
 - ✓ Outstanding performance
 - Exceeds expectations
- It is recommended that AP employees also have performance expectations*

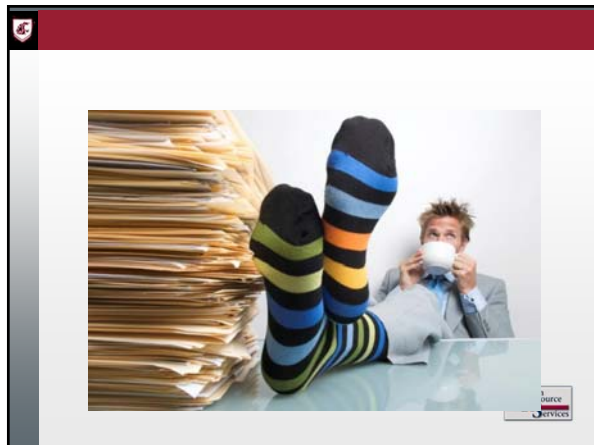


Performance Expectations

- 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



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EMPLOYEE PERFORMANCE EVALUATION

EMPLOYEE: [] INSTITUTION/DEPARTMENT: []

EMPL ID: [] REVIEW NO: []

EMPLOYEE'S NAME: [] CLASSIFICATION TITLE: [] EVALUATION PERIOD: FROM [] TO [] EVALUATOR DATE: []

PERFORMANCE FACTORS	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 ADDITIONAL WORK COMPLETION OF ASSIGNED WORK	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 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 PRODUCTIVELY WITH SUPERVISORS	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 EFFECTIVE COMMUNICATION SKILLS PROBLEM SOLVING SKILLS ABILITY TO ORGANIZE WORK		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 the performance expectations for his/her position, made many significant contributions in 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 in 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 significant performance expectations for his/her job.


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

*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 6months• 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

Biases

Inflated Rating

Gossip

Déjà vu

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





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



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