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

Employee       Communication       Supervisor

Position Descriptions – Nuts and Bolts
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.

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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:     | • Quantity of Work
|                   | • Quality of Work
|                   | • Job Knowledge
|                   | • Working Relationships
|                   | • Other Criteria
| Administrative Professional: | • Productivity
|                         | • Quality of Work
|                         | • Interpersonal Skills
|                         | • Optional Factors
Performance Expectation Categories

• Expectations for Civil Service employees must include:
  ✓ Unsatisfactory
  ✓ Needs improvement
  ✓ Satisfactory
    o meets expectations
  ✓ Outstanding performance
    o 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
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

<table>
<thead>
<tr>
<th>Civil Services</th>
<th>Bargaining Unit</th>
<th>Administrative Professional</th>
<th>Faculty</th>
</tr>
</thead>
<tbody>
<tr>
<td>• WAC 357-37</td>
<td>• Collective Bargaining Agreement</td>
<td>• AP Handbook</td>
<td>• Faculty Manual</td>
</tr>
<tr>
<td>• BPPM 60.55</td>
<td>• Some state No Performance Eval – 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>• HRS</td>
<td>• May Use WORQS</td>
</tr>
<tr>
<td>• Probation or Trial Service – 6 months</td>
<td></td>
<td></td>
<td>• Provosts Office</td>
</tr>
<tr>
<td>• May be postponed for Smoother</td>
<td></td>
<td></td>
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<tr>
<td>• May request cyclic reviews</td>
<td></td>
<td></td>
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<tr>
<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
- Plan planning
- Set goals and expectations
- Facilitate communication

Planning for the Meeting
- Coordinate in advance
- Collect all necessary documents
- Review evaluation materials
- 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 understanding
- Summarize improvement plan and 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
- Déjà vu
- Inflated Rating
- 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

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

This has been a WSU Training Videoconference
### Planning for Growth

#### Reminders

<table>
<thead>
<tr>
<th>Purpose of Review Meeting</th>
<th>Planning for the Meeting</th>
<th>During the Meeting</th>
<th>Closing the Meeting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discuss, review previous</td>
<td>Coordinate in advance</td>
<td>Share assessment</td>
<td>Summarize discussion</td>
</tr>
<tr>
<td>Goals, plan, and objectives</td>
<td>Schedule appropriate amount of time</td>
<td>State action points</td>
<td>Confirm employees</td>
</tr>
<tr>
<td>Facilitate communication</td>
<td>Select an appropriate location and time</td>
<td>Encourage action and participation</td>
<td>Get feedback</td>
</tr>
</tbody>
</table>

#### Purpose of Review Meeting

- Discuss, review previous, goals, plan, and objectives.
- Facilitate communication.

#### Planning for the Meeting

- Coordinate in advance.
- Schedule appropriate amount of time.
- Select an appropriate location and time.

#### During the Meeting

- Share assessment.
- State action points.
- Encourage action and participation.

#### Closing the Meeting

- Summarize discussion.
- Confirm employees' understanding.
- Summarize improvement plan(s) and/or goals.
- End positively.

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### Assign and monitor employee training:

- **Progress in Learning**
- Welcome to the new and improved WSU Yellow Training System
- Earned your mind. Your career will be fruitful.
- [hrs.wsu.edu/skillsoft](hrs.wsu.edu/skillsoft)