



WASHINGTON STATE UNIVERSITY


WSU Training

Spring 2021

Introduction to Performance Evaluations

Today's Learning Objectives

- Describe the three "Building Blocks" of performance management
- Define the components of well-written job descriptions
- Become familiar with defining essential functions of a job
- 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

Human Resource Services

Position Descriptions – Nuts and Bolts




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**


**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

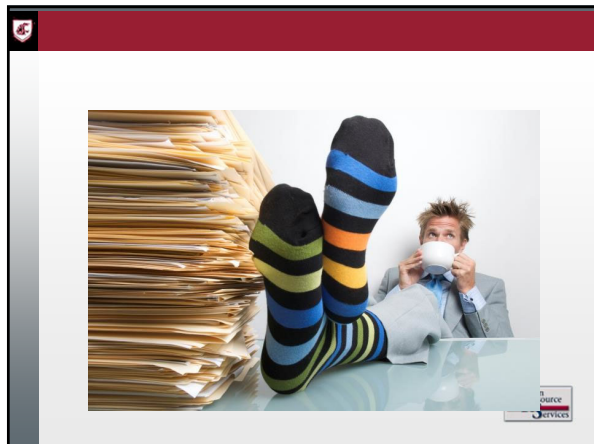
- Consistent
- Realistically attainable
- Legally defensible
 - ✓ Valid
 - ✓ Free of bias
 - ✓ In compliance with applicable laws, regulations, WSU policy and procedures











Building Blocks of Performance Management

Position Descriptions

Performance Expectations


Performance Reviews

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

INSTITUTION/DEPARTMENT

EMPLOYEE'S NAME

CLASSIFICATION TITLE

EVALUATION PERIOD

EVALUATION DATE

PERFORMANCE FACTORS	PERFORMANCE EXPECTATIONS, COMMENTS AND/OR EXAMPLES ATTACH EXTRA SHEETS IF NEEDED	RATING
1. QUALITY OF WORK DEPENDENCE, ACCURACY, NEATNESS, THOROUGHNESS	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 USE OF TIME, VOLUME OF WORK, EFFORT, ABILITY TO MEET DEADLINES, PRODUCTIVITY LEVELS	MEETS EXPECTATIONS/SATISFACTORY - Reviews work load daily. Makes an effort to accommodate anticipated 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 DEGREE OF TRAINING, KNOWLEDGE, PROBLEM-SOLVING ABILITY	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, STUDENTS AND COLLEAGUES	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 DIRECTING JUNIOR PERSONNEL, ABILITY TO MANAGE WORKING UNDER SUPERVISION, ABILITY TO MANAGE WORKING UNDER SUPERVISION, ABILITY TO MANAGE WORKING UNDER SUPERVISION	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
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

EXCEEDS EXPECTATIONS - The employee has exceeded all of the performance expectations for this factor and has made significant contributions to the efficiency and economy of the organization through such performance.

OUTSTANDING - The employee has exceeded all of the performance expectations for this factor and has made significant contributions to the efficiency and economy of the organization through such performance.

MEETS EXPECTATIONS - The employee has met the performance expectations for this factor and has contributed to the efficiency and economy of the organization.


NEEDS IMPROVEMENT - The employee has failed to meet one or more of the significant performance expectations for this factor.

UNSATISFACTORY - The employee has failed to meet one or more of the significant performance expectations for this factor.

Give specific examples of this employee's performance.

Evaluation Policies


Civil Services	Bargaining Unit	Administrative Professional
<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



Performance Review Preparation


Things to Consider

- Review employee's goals and accomplishments
- Possible impact of i.e.
 - COVID
 - Teaching and/or caring for children and or elders at home
 - Uncertainty, i.e. financial
 - Unanticipated leaves
 - Workday implementation
- Public Accountability/Time
- Fairness and Consistency



Conducting Reviews Remotely

- Set the Right Tone
- Allow Adequate Time and Privacy
- Video is Important
- Pay Attention to Body Language
- Listen Carefully
 - Encourage back and forth communication
 - Do not be distracted by emails or Instant Messages
- Summarize the Meeting



Performance Review Meetings

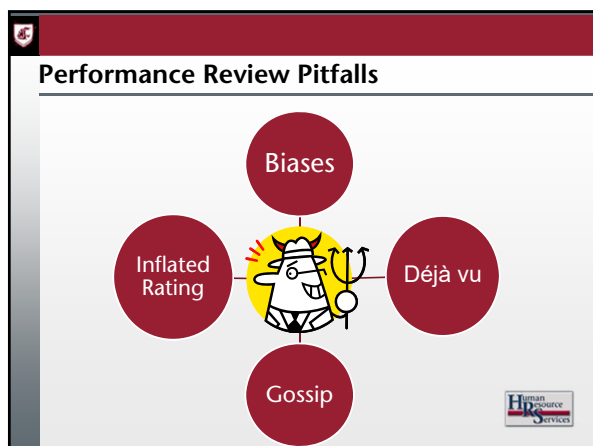
Purpose of Review Meeting			
Discuss review period	Future planning	Clarify ratings/expectations	Facilitate communication
Planning for the Meeting			
Coordinate in advance	Schedule appropriate amount of time	Review evaluation prior to meeting?	Talking points
During the Meeting			
Greet employee / put 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

Human Resource Services



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



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

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

Summary


Building Blocks of Performance Management

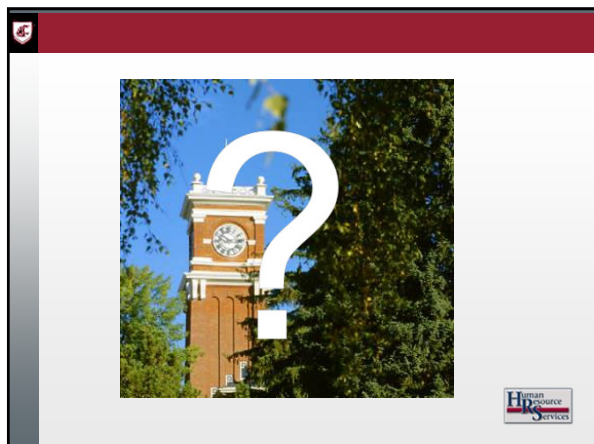
- Current and accurate position description and performance expectations
 - ⇒ Lead to useful and valid performance reviews.

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

Human Resource Services



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
