

WASHINGTON STATE UNIVERSITY



### WSU Training for Supervisors

Giving Effective Annual Reviews

May 2020

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*"Wow, I'm so excited for my performance review today!"*

- Said by no one . . . ever



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#### Presentation Overview

- Describe the three "Building Blocks" of performance management
- Review the components of a job descriptions
- Discuss effective performance expectations
- Discuss the phases of productive review meetings



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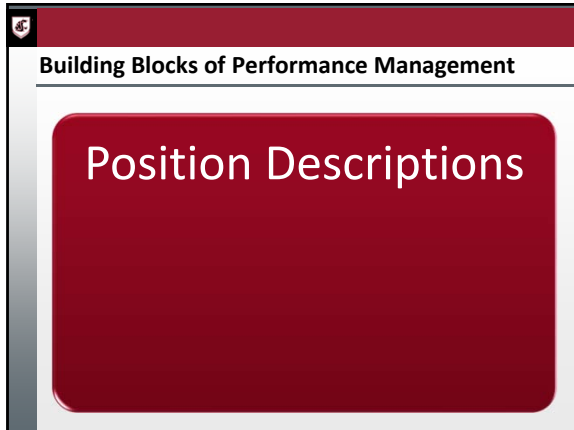
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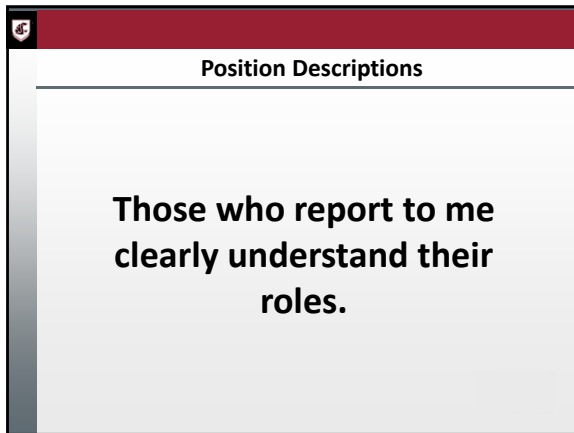
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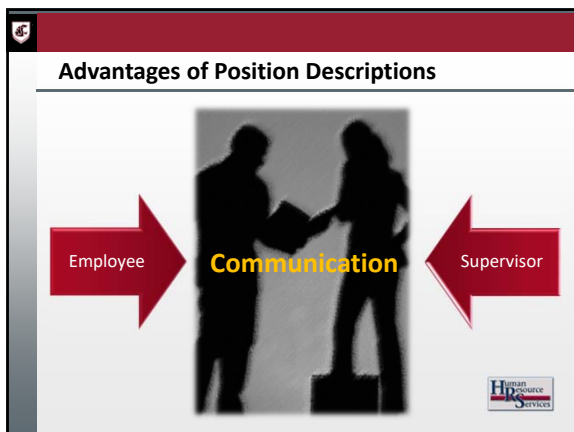
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**Position Description Defined**

- A statement of principal duties and functions.
- A summary of scope of authority and responsibility.
- Specific to the needs of the department (Not to the employee)



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**Position Descriptions – Nuts and Bolts**



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**Building Blocks of Performance Management**

Position Descriptions

Performance Expectations

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**Performance Expectations**

Those who report to me understand that success in their positions requires....

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**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"*



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**Performance Expectation Categories**

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

HR Services logo

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**Performance Expectations**

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

HR Services logo

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**Performance Reviews**

**Those who report to me receive constructive and corrective feedback from me throughout the year.**

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**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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**Evaluation Policies**

Civil Service	Administrative Professional
<ul style="list-style-type: none"><li>• WAC 357-37</li><li>• BPPM 60.55</li><li>• REQUIRED</li><li>• Permanent EE's - Annually (prior to PID)</li><li>• Probation or Trial Service – 6 months</li><li>• May request cyclic reviews</li><li>• HRS available to assist with questions and the process</li></ul>	<ul style="list-style-type: none"><li>• AP Handbook</li><li>• BPPM 60.55</li><li>• Calendar Year</li><li>• <b>Foundation Fiscal Year</b></li><li>• HRS available to assist with questions and the process</li></ul>



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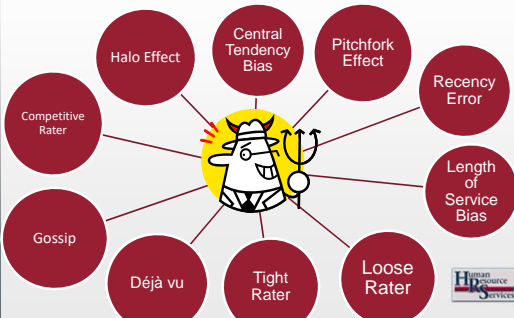
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**Performance Review Pitfalls**



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**Performance Review Considerations**

- An opportunity to review position description
- Don't have the employee write their own review
- Review shouldn't be a surprise
- Should not replace corrective action processes



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**SMART Goals**



- Specific
- Measurable
- Attainable
- Relevant
- Timely



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**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

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**Performance Review Reminders**

- CS employees may appeal
  - alleged irregularities in forms and/or procedures, not content
- Written Rebuttal
- Employee signature:
  - indicates receipt of review – not agreement



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**Preparing for Next Year**

- Periodically review goals and performance
- Monitor progress in removing deficiencies
- For growth and development
  - ✓ Encourage employee
  - ✓ Provide an environment that allows for success



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**Summary**

**Building Blocks of Performance Management**

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



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**Items For Reflection**

- Do those who report to me clearly understand their roles?
- Do those who report to me understand what is required to be successful in their position?
- Do those who report to me receive constructive and corrective feedback from me throughout the year?



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**Planning for Growth**

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

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**Resources**

- BPPM 60.55
- WAC 357.37
- Collective Bargaining Unit Agreements
- Administrative Professional Handbook
- 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.wsujobs.com/hr](http://www.wsujobs.com/hr)
- HRS- [www.hrs.wsu.edu](http://www.hrs.wsu.edu)
- Questions can be directed to HRS
  - Bonnie Wilmoth 335-9594, or [bonnie.wilmoth@wsu.edu](mailto:bonnie.wilmoth@wsu.edu)



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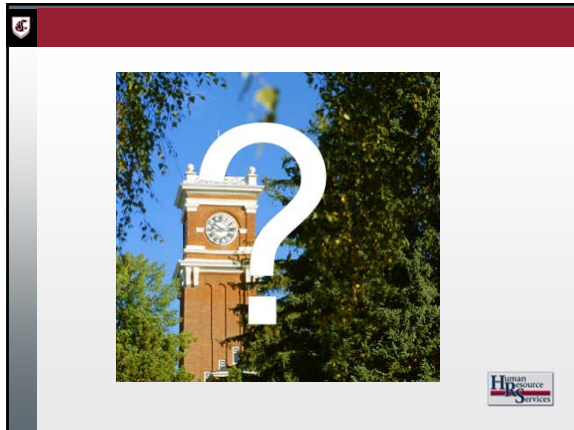
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**Related Trainings**

- **Supervisor and Manager Trainings**
  - Position Descriptions, Expectations and Annual Reviews (Fall)
  - Corrective Action and Discipline (Fall)
  - Performance Management Case Studies (Fall)
  - Workplace Communication: Giving and Receiving Feedback (Spring)
  - Supervising Student and Hourly Workers (Spring)
  - Workplace Issues Case Studies (Spring)

Human Resource Services

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