

WASHINGTON STATE UNIVERSITY




WSU Training for Supervisors

Position Descriptions, Expectations, and Annual Reviews


September 2015

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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

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Human Resource Services

Building Block One – Position Descriptions

Those who report to me clearly understand their roles.

Advantages of Position Descriptions




Employee **Communication** Supervisor

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)

Position Descriptions – Nuts and Bolts



Performance Expectations

Details

Duties

Position Description

Supervisor /Lead


Essential Competencies

Qualifications

Small Group Activity

Using the sample Job Description provided, identify:


- ✓ Essential job duties of the position
- ✓ Non-essential duties
- ✓ Required (minimum) qualifications
- ✓ Preferred 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.







 **Building Blocks of Performance Management**

Position Descriptions

Performance Expectations

 **Building Block Two – Performance Expectations**


Those who report to me understand that success in their 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.*



Writing Performance Expectations


Return to the sample job description used in the previous activity.

In your small group, write 2-3 performance expectations related to the position.





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





EMPLOYEE PERFORMANCE EVALUATION

 INSTITUTION/DEPARTMENT

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 WSUID NO.

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 See 60.55

EMPLOYEE'S NAME	CLASSIFICATION TITLE	EVALUATION PERIOD FROM _____ TO _____	EVALUATION DATE
PERFORMANCE FACTORS	PERFORMANCE EXPECTATIONS: COMMENTS AND/OR EXAMPLES (ATTACH EXTRA SHEETS IF NEEDED)		RATING
1. QUALITY OF WORK COMPETENCE, 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 ACCOMPLISHED, ABILITY TO MEET SCHEDULES, PRODUCTIVITY LEVELS	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 DEGREE OF TECHNICAL KNOWLEDGE, UNDERSTANDING OF JOB 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 WITH SUPERVISOR, CO-WORKERS, STUDENTS, AND CLIENTS SERVED.	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 SUBOR- DINATES, DELEGATION, EVALUATING SUBORDINATES, PLANNING AND ORGANIZING WORK, PROBLEM SOLVING, DECISION MAKING ABILITY, ABILITY TO COMMUNICATE			OUTSTANDING *
			EXCEEDS EXPECTATIONS
			MEETS EXPECTATIONS
			NEEDS IMPROVEMENT
			UNSATISFACTORY *
6. OPTIONAL 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 of the performance expectations for this factor and has made many significant contributions to the efficiency and economy of this organization through such performance.

EXCEEDS EXPECTATIONS — The employee regularly works beyond a majority of the performance expectations of this factor and has made significant contributions to the efficiency and economy of this 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 this 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 the performance expectations for this factor.

* Give specific examples of this 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

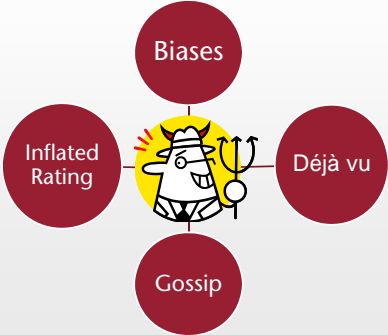
End positively

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




The diagram features a central cartoon character with a yellow face, wearing a white shirt and tie, and holding a pen. It is surrounded by four red circles, each containing a pitfall: "Biases" at the top, "Inflated Rating" on the left, "Déjà vu" on the right, and "Gossip" at the bottom.



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



Human Resource Services

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

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 employees understanding	Summarize improvement plan(s) and/or goals	End positively

Assign and monitor employee training:



hrs.wsu.edu/skillssoft





Position Description:

Title Details

Employee Type	
University Title	
Title Code	
Pay Range	
Minimum Salary	
Maximum Salary	
Job Group	
SOC	
Affirmative Action Goals	
Function General Scope	
Required Qualifications	

Position Details [Edit](#)

Employee Information

Employee First Name	
Employee Last Name	

Position Details

Please record information regarding the position such as work location, FTE, and term. The information is used, along with the other information, as a basis for HRS determination of the appropriate title, salary rate, and Fair Labor Standards Act (FLSA) exemption status.

University Title	Official Title - Determined by HRS using Civil Service Classifications or AP Benchmarks
Title Code	
Working Title	
Position Number	Working Title - Set by department and used to better define the position
College/Area	
Department	
Hiring Unit	
Work Location	
Position Supervisor	Reports To – in the Organizational chart – who does this position report to – Important in determining classification

This position is in a Bargaining Unit	
Bargaining Unit Work Schedule (if applicable)	
Summary of Duties	Summary – Brief summary of why the position exists and what it is responsible for – What applicants see
Position Status	Temporary vs. Permanent - Not tied to funding
Appointment FTE%	
Position Term in Months	
FLSA Status	Overtime Eligible vs. Overtime Exempt – Based on JOB DUTIES – determined by HRS
FLSA Exemption Criteria	
Administrative Professional Exemption Criteria	

Job Duties [Edit](#)

Access Requirement

Access Requirement	Financial Data Cash Handling Personnel Data Student Data Access to vulnerable adults or minors	Used to determine training, background check requirements, etc.
Other Access Requirements		

Job Duties

*A minimum of 1 entry is required.

Essential Duty	Essential Functions – Tasks employee must be able to perform in order to fulfill primary purpose of job. Used to determine classification, overtime eligibility, and position requirements Essential Vs. Non-Essential (5% - Other related duties as assigned)
Percent of Time	

Job Function	
Duties Performed	
Essential Duty	
Percent of Time	
Job Function	
Duties Performed	
Essential Duty	
Percent of Time	
Job Function	
Duties Performed	
Essential Duty	
Percent of Time	
Job Function	

Duties Performed	
Essential Duty	
Percent of Time	
Job Function	
Duties Performed	

Supervisory/Lead Responsibilities

Lead Definition- A lead employee has delegated responsibility for training, assigning, organizing or scheduling work, and reviewing completed work assignments. A lead employee does not make hiring decisions.

Supervisor Definition- A supervisor has the authority to recommend hiring of staff, establish job performance standards, evaluate job performance, and take corrective action if performance is not acceptable. Supervisors are also responsible for training, assigning and scheduling work, and acting upon leave requests.

Does this position LEAD the work of others?	Lead – Regularly assign, instruct, and check work of others (1FTE or Equivalent)
Type of employees led	Students/Temp Hourly/ Staff/ AP
Does the combined FTE of all positions lead equal at least 100%?	
Does this position SUPERVISE the work of others?	Supervise – Train, plan/assign work, evaluate performance, take corrective action, recommend discipline (1FTE or Equivalent)

Does this position supervise one or more full time equivalent (FTE) positions?	
Type of employees supervised	Students/Temp Hourly/ Staff/ AP

Position Qualifications

ALL QUALIFICATIONS MUST BE CLEARLY JOB RELATED

Required Qualifications	Classification Requirements - Minimum levels of education, experience, knowledge, skills, and abilities needed to perform the job. Determined by classification – Cannot be modified
Additional Requirements	Position-Specific Requirements – Additional requirements not listed in the classification requirement. Specific certifications or licenses (valid driver's license, professional certification, etc.) Often required at time of hire.
Preferred Qualifications	Preferred Qualifications – Additional requirements such as higher levels of education, experience, etc. the employer would like the individual to possess. Those desired but not mandatory.

Essential Work Competencies [Edit](#)

Essential Work Competencies

The essential work competencies are the knowledge, skills, abilities, mental requirements, physical requirements, and working conditions related to the duties and responsibilities identified as essential functions of the position.

<p>Knowledge, Skills, Abilities or Competencies Describe the knowledge, skills and abilities required of the position.</p>	<p>Knowledge of: basic duties and responsibilities of the position; basic skills associated with a single task; basic principles and practices of supervisory techniques. Skill: with operating specific equipment; in carrying out clearly defined procedures. Ability to: demonstrate basic reading and writing skills; prioritize and arrange job assignments; use common sense approaches and make prudent and sound decisions.</p>
<p>Mental Requirements Indicate the mental demands of the position.</p>	<p>Mental Requirements - Describe the mental demands of the job related to the duties and responsibilities.</p>

Physical Requirements

Indicate the physical demands of the position. The requirements selected must be related to the duties and responsibilities identified as essential functions.

Occasionally = occurs less than 33% of hours worked

Frequently = occurs 33% - 66% of hours worked

Continuous = occurs more than 66% of hours worked

Specify the amount the position will be required to LIFT/CARRY frequently	<p>Physical Requirements - Describe the physical demands of the job and indicates the nature of any lifting or mobility requirements.</p> <p>Lift/Carry and Push/Pull– N/A, up to 10, 20, 50 lbs, over 50 lbs</p> <p>Mobility requirements – bend, twist, squat, climb, kneel/crawl, reach/reach overhead, finger dexterity/fine manipulation, sit, drive</p> <p><i>Occasionally</i> – Less than 33%</p> <p><i>Frequently</i> – 33% - 66%</p> <p><i>Continuously</i> – More than 66% of time</p> <p>N/A – Never</p>
Specify the amount the position will be required to PULL/PUSH frequently	
Bend	
Twist	
Squat	
Climb	
Kneel/Crawl	
Reach/Reach Overhead	
Finger Dexterity/Fine Manipulation	
Sit	

Drive
List any unique work conditions this position will encounter

Unique Work Conditions – extreme temperatures, fumes/odors/mists/dusts, confined areas/spaces, extreme sounds/noises/vibrations, potential hazards (i.e., radiation, hazardous material, biohazards, etc.)

Performance Expectations [Edit](#)

Performance Expectations

Quality of Work
Quantity of Work
Job Knowledge
Working Relationships
Other Factors (OPTIONAL)

Salary Detail [Edit](#)

Salary Detail

Requested Monthly Salary
Approved Monthly Salary
Salary Range
Approved Salary Step

Employee [Edit](#)

Seated User

Details

First Name	
Last Name	
Work Email	
WSU ID	

Supervisor [Edit](#)

Supervisor Position Description

Job Title	
Position Number	
Org Unit	
First Name	
Last Name	
Email	
User Groups	

Required fields are indicated with an asterisk (*).

Job Title Custodian 1

Function General Scope Positions in this level work under general supervision. Positions perform routine housekeeping and custodial duties.

Summary of Duties Under general supervision, perform custodial tasks to maintain cleanliness and care of facilities within assigned area.

Job Duties

Essential Duty Yes/No (Circle one)

Percentage of Time 5%

Job Function Misc.

Duties Performed Report repairs and/or maintenance needs. Lock/unlock buildings. Secure building when facilities are not in use/checking for unlocked doors and windows. Report unauthorized occupants.

Essential Duty Yes/No (Circle one)

Percentage of Time 5%

Job Function Other

Duties Performed Performs other related duties as assigned.

Essential Duty Yes/No (Circle one)

Percentage of Time 5%

Job Function Special Event Maintenance

Duties Performed Set-up and take down equipment, such as chalkboards and easels, and furnishings, such as folding chairs and tables needed for meetings, classrooms, conferences, and events. May wash interior or easily accessible exterior Windows.

Essential Duty Yes/No (Circle one)

Percentage of Time 5%

Job Function Outdoor Maintenance

Duties Performed Perform cleaning and related activities in areas within a reasonable distance from buildings using hand-operated tools or small power equipment to remove snow or debris, or sweeping sidewalks and/or stairs. Operate high-pressure washer.

Essential Duty	Yes/No (Circle one)
Percentage of Time	5%
Job Function	Student Room Maintenance
Duties Performed	May check students in and out; issue linen and bedding; keep student rooms inventory records; change and make beds. May move furniture, equipment, supplies and tools on an incidental basis.

Essential Duty	Yes/No (Circle one)
Percentage of Time	50%
Job Function	Common Area Maintenance
Duties Performed	Clean and sanitize restrooms/shower rooms, common areas and fixtures. Sweep, mop or vacuum floors, in accordance with established procedures and standards using a variety of Power equipment and hand tools. Refill restroom dispensers. Clean chalkboards and erasers. Dust and wipe furniture. Empty wastebaskets, trash, and recycle containers. Empty and clean ashtrays and cigarette urns. Replace light bulbs.

Essential Duty	Yes/No (Circle one)
Percentage of Time	25%
Job Function	Floor Maintenance
Duties Performed	Strip, clean, buff and apply finish to floors using high speed floor buffers/polishers. Vacuum and clean carpets using a variety of power equipment and hand tools. Use and maintain assigned power equipment and hand tools such as vacuum, broom, mop, squeegee, ladder for the cleaning and general maintenance of floors, walls, carpets, and furniture. Follow written and/or verbal instructions regarding the use of chemicals, supplies and equipment. Ensure own work is performed in compliance with safety policies and procedures.

Supervisory/Lead Responsibilities

Lead Definition- A lead employee has delegated responsibility for training, assigning, organizing or scheduling work, and reviewing completed work assignments. A lead employee does not make hiring decisions.

Supervisor Definition- A supervisor has the authority to recommend hiring of staff, establish job performance standards, evaluate job performance, and take corrective action if performance is not acceptable. Supervisors are also responsible for training, assigning and scheduling work, and acting upon leave requests.

Does this position LEAD the work of others?

Does this position SUPERVISE the work of others?

Position Qualifications

Minimum Qualifications: Minimum age of 18 years

Additional Requirements: HS Diploma or GED. Prior janitorial experience. Valid Driver's License required.

Preferred Qualifications: None

The **essential work competencies** are the knowledge, skills, abilities, mental requirements, physical requirements, and working conditions related to the duties and responsibilities identified as essential functions of the position.

Knowledge, skills and abilities or competencies

Knowledge of current cleaning standards and policies set by housing services for assigned areas. -Knowledge of the basic duties and responsibilities of the position. -Knowledge of receiving, recording, storage of stocks and supplies. - Knowledge of proper use of tools and safety techniques and applications in order to prevent on-the-job accidents and create and maintain a safe working environment. -Ability to have a good working relationship with hall or apartment staff, students, supervisors and fellow employees. -Ability to take initiative to perform tasks in ADVANCE of lead or supervisor requests. -Ability to prioritize and arrange job assignments. -Ability to perform demanding physical labor. - Commitment to Diversity: an appreciation of the benefits of a diverse workplace and willingness to take actions to enhance the Diversity of WSU

Mental Requirements:

-Ability to reason logically. -Ability to understand and follow verbal and written instructions, and established procedures. -Ability to communicate effectively orally and in writing. -Ability to listen and communicate sufficiently to interact with customers in person and on the phone. -Ability to apply technical Knowledge related to the duties and responsibilities of the position. -Ability to deal simultaneously with several projects/problems. -Ability to work in stressful environment, on an Occasional basis. -Ability to maintain regular attendance and be punctual.

Performance Expectations

Quality of Work

Quantity of Work

Job Knowledge

Working Relationships

Other Factors (OPTIONAL)