



Employee Guide to Performance Management

Classified and Non-classified Employees

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How Will Performance Management Affect Me?

Performance management is a process that should occur on an ongoing basis. Just as your supervisor utilizes performance management with you, your supervisor's boss is doing the same with him or her.

You may be asked to work with your supervisor to establish goals for your position. Your supervisor may assist you in your job by providing coaching or direction during the year. This provides opportunities for adjustment along the way, instead of waiting until the end of the review period. Your supervisor will receive training in Performance Management and on how to conduct a Performance Review. Overall, performance management is a system of providing direct, open communication and feedback in order to help you succeed in your job.

You have input into the review process through your pre-review form, and you may comment in the employee comment section after the review is finished. As always, your supervisor is available to answer any questions you may have.

What is Performance Management?

Performance Management is an ongoing process between the supervisor and the employee that occurs throughout the year. It involves setting clear expectations about your job duties, understanding how they contribute to the goals of the department and WLU, and establishing how your job performance will be measured and developed.

One of the first questions supervisors and employees ask is, "What's the difference between performance management and the performance review?" Performance management is an ongoing process of planning, goal-setting, performance feedback, and employee development. The performance review occurs when you and your supervisor sit down to formally review your performance over the last evaluation period. Its value lies in the opportunity to evaluate what is and isn't working, and allows both you and your supervisor to better communicate with each other about your job performance.



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Measurement: Standard Elements

There are 10 University-Wide Core Performance Elements, listed below, that are used for every Performance Review. Each of these elements is applied to your job; for example, finishing your work on time would be measured under the Accountability element.

Job Knowledge: Understands job procedures, policies, and responsibilities; exhibits ability to learn and apply new skills; keeps up-to-date on current developments; acts as a resource person to others.

Customer Service: Understands the needs of internal and external customers; responds promptly to customer needs in a courteous manner; handles conflicts appropriately with others.

Teamwork: Exhibits flexibility, adaptability, and spirit of cooperation in the work environment; balances team and individual responsibilities; shares information appropriately with others.

Accountability: Takes responsibility for own actions; completes assignments and projects on schedule; reviews projects and assignments, monitoring resources and budgetary matters to ensure cost savings measures are in place.

Quality of Work: Completes work product thoroughly, accurately and according to specifications; produces useful results; displays commitment to process improvement; applies feedback to improve performance.

Quantity of Work: Produces acceptable amount of work in relation to reasonable expectations, availability of resources, etc.

Communications: Communicates in a clear and concise manner both verbally and in writing; exhibits good listening and comprehension skills; uses appropriate communication methods.

Pro-activity/Initiative: Develops new ideas and can handle new situations; anticipates and appropriately handles unforeseen difficulties successfully; seeks increased responsibilities; asks for help when needed; sees resources effectively.

Flexibility: Maintains a high level of performance under varying conditions of managing multiple priorities or uncertainty; adapts to new situations in a positive manner.

Interpersonal Relations: Treats others with respect and courtesy; works effectively and cooperatively with others; respects individual differences and perspectives.

Performance Elements #11 and #12 for Job-Specific Measures: This space is designed to accommodate department-specific performance elements not covered by one of the performance elements listed on the form. For example, safety standards could be an important element of your job; they could be measured here.

Additional Measured Elements

In addition to the 12 elements listed above, the following six elements are used to evaluate the performance of supervisors, managers, or those with project leadership responsibility: Strategic Thinking, Planning and Organizing, Staff Development, Performance Management, and Employee Performance Reviews.

How is My Performance Reviewed and Rated?

There aren't any secrets in Performance Management; that's what makes it so successful for both the supervisor and the employee. The performance elements on the previous page describe indicators of employee performance; on this page, the standards used to measure those elements are described. Classified and Non-classified employees' performance will be rated according to one of the following performance descriptors. In the examples below, the customer service performance element has been applied to each of the four descriptors in order to illustrate how different levels of employee's performance might be rated.

Valued Performer:

Performance meets the defined job expectations. The employee is doing the job at the level expected for employees in this position, and is doing a good job. Skill level is competent. Key behaviors are acceptable. The good performance is due to the employee's own effort and skills. This rating will be used for most employees. Example: Employee greets customers promptly and in a friendly manner. Customers are addressed by name.

Exceeds Requirements:

Performance is far above the defined job expectations and frequently exceeds job expectations. Results are consistently above average. The employee consistently does good work, regularly going far beyond what is expected of employees in this job. The employee is generally doing a very good job. Skill level and key behaviors are average. This rating is reserved for the exceptional performance and requires written justification. Example: Employee personally telephones customer when the repair is complete. In order to assure customer satisfaction, employee also makes a follow-up call two weeks after the customer had the repaired item.

Substantially Exceeds Requirements:

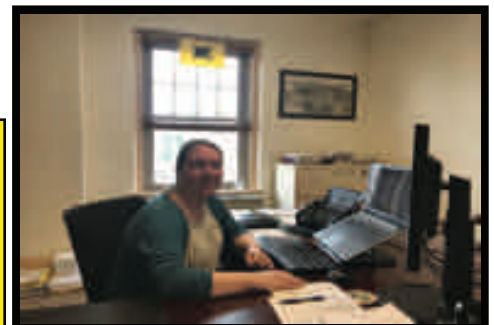
Performance is far above the defined job expectations. Results are consistently excellent. The employee consistently does outstanding work, regularly going far beyond what is expected of employees in this job. Skill level and key behaviors are exemplary. This rating is reserved for those few distinguished performers and requires written justification. Example: On employee's own initiative, develops a direct mail and online survey in order to analyze customer satisfaction and solicit input for additional services requested by customers.

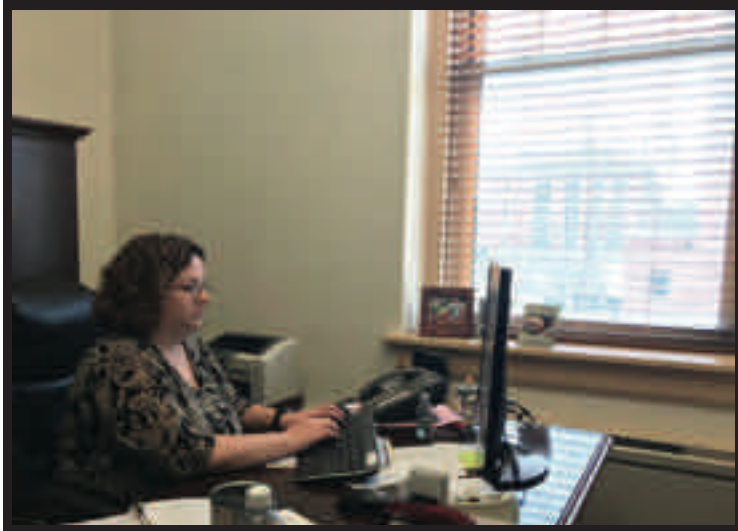
Needs Improvement:

Performance does not fully meet job expectations. Performance is below average. Skill level indicated need for improvement. Key behaviors are less acceptable. This rating requires a written plan for improvement with specific goals and time frames. This rating can also be used for employees who are still within their probationary/provisional period and are still learning certain aspects of the job. Example: Employee makes follow-up calls on 40 percent of customers. Job standards indicate a 90 percent rate is expected.

In each example, the performance rating is dependent upon the employee's pattern of performance.

By working together to make sure the job description represents the employee's actual duties and responsibilities, the supervisor and employee can establish fair and equitable standards for measuring job performance. Obtain a copy of your job description, and make sure it is up-to-date!





How Should I Prepare for the Performance Review

As your date for review approaches, think about your past performance, the progress you have made, and your plans for the future. Take the time to work through the following questions:

- Have you written down your major accomplishments the last review period?
- Consider the performance elements listed on page 2 of this guide; can you pinpoint ways in which you have fulfilled them?
- Do you have set goals? Have you established where you are in reaching them?
- How do your job duties relate to your department's goals?
- Where do you want feedback, and how might your supervisor help you to do your job better?
- What skills or abilities have you developed?
- How could you better utilize your talents in your present position?
- What do you consider to be the priorities of your job, and does your supervisor agree with them?
- What resources or training would help you to perform your job better?

"Every job is a self-portrait of the person who did it.
Autograph your work with excellence."

-Vince Lombardi

How Does the Performance Review Process Work?

1. Pre-Review Form

Your supervisor will give an employee a Pre-Review Form approximately two weeks before the performance discussion. You should complete it and return it to your supervisor within one week.

If your job description is not currently up to date, you will have an opportunity to note that on the Pre-Review Form.

Your supervisor will then schedule a Performance Review meeting with you.

2. Performance Review Discussion

During the Performance Review meeting, you and your supervisor will discuss your job performance for the last period (using the criteria on pages 2 and 3 of this guide).

3. Goals

Together with your supervisor, you may also establish goals, objectives, projects, and assignments for the next evaluation period.

4. Make Comments

You will then have an opportunity to review the Performance Review Form and make comments about the review. You have up to 10 working days to offer comments on the review.

5. Sign Form

You and the supervisor will sign the Performance Review Form. It will then go to the next-level supervisor for his or her signature.

6. Keep a Copy and Forward the Original

Your supervisor will make copies of the finalized Performance Review Form with your comments, if you made any. Your supervisor will keep a copy and make a copy for you, and the original will be forwarded to Human Resources where it will be filed in your official file.

7. Continue to Talk With Your Supervisor

During the following year, you will receive regular on-going feedback on your performance, and your goals (if established). This feedback may be formal or informal.

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