

Policy No. HR-416

Performance Management Policy

Applies to: All classified employees and supervisors of Eastern Washington State Historical Society (EWSHS).

References that apply to this policy:

- State law – [Chapter 41.06 RCW State civil service law](#)
- State rule – [Chapter 357-37 WAC Performance Management](#)

Effective date: July 10, 2024

History: This is a new policy.

Approved by: EWSHS Board of Trustees

Purpose

This policy provides direction for an employee performance management process that is positive and performance-based. Successful performance management encourages employee competence and productivity, and documents an employee’s work strengths and areas to improve while supporting the goals and objectives of the **EWSHS**.

Definitions

Expectations means the statements that identify tasks or functions to be completed by the employee.

Standards means the statements that identify how well the tasks or functions must be completed to be considered satisfactory.

Policy

A. Performance Management Process

The Performance Development Plan (PDP) is used to document the following areas of an employee’s performance development:

1. Describes the employee’s responsibility to successfully perform assigned job duties and responsibilities;
2. Assesses how well the employee has contributed to meeting the goals and objectives of the organization and his or her position; and
3. Recognizes an employee’s successful job performance and identifies appropriate modifications in job performance.

B. Employee Responsibilities

The employee has the responsibility to:

1. Request clarification of any job duty, standard, or expectation that is unclear;
2. Perform assigned work meeting job standards and expectations;
3. Participate in the performance evaluation process; and
4. Communicate successes and problems with his or her supervisor so progress and ongoing performance can be measured, and training or assistance provided.

C. Supervisor's Responsibilities

1. Provide written job performance expectations and standards to the employee and discuss them with the employee within 30 days of hiring date the employee or assigning a function.
2. In accordance with the Employee Training and Development Policy (HR-406), ensure the employee receives the training necessary to successfully meet the stated expectations and standards of the current position. Training consideration will first be given to meet the employee's current position requirements before other developmental purposes.
3. Supervisors shall assess an employee's job performance in relation to identified performance expectations at least annually on the PDP. The assessment shall document an employee's job performance during the review period; identify any necessary changes in job performance, and identify a plan to achieve improvement as needed.
 - a. Supervisors will engage employees in the process of planning, managing, and appraising their own performance. This will include providing employees with ongoing performance feedback and coaching and conducting formal evaluations on a timely basis as appropriate (probationary, trial service, annual);
 - b. All employees will be held accountable by their supervisors for achieving their performance expectations;
 - c. Supervisors shall document how well the employee has contributed to efficiency and effectiveness in fulfilling the objectives their position and the agency;
 - d. Supervisors will take timely remedial measures when an employee's performance does not meet the outcomes and standards set forth in the PDP;
 - e. Supervisors will encourage employee suggestions and communications for improving work processes.
4. Provide ongoing feedback to the employee regarding the employee's job performance. Feedback includes, but is not limited to:
 - a. Naturally occurring discussions with the employee by telephone, virtual, or face-to-face;
 - b. The formal evaluation process, using the PDP;
 - c. Employee recognition and reward programs or activities;
 - d. Coaching sessions to improve or enhance employee skills, knowledge, or ability to perform a task or function.
5. Hold employees accountable for meeting performance expectations and standards, and participate in the just cause process if necessary to correct an employee's poor performance.
6. Assist their employee to identify potential career growth opportunities within **EWSHS** and actions the employee may take to access those opportunities.

D. Performance Development Plan (PDP)

1. A supervisor must provide feedback and formally evaluate the performance of:
 - a. A probationary employee or a permanent employee serving a trial service period or transition review period before the employee attains permanent status in the position; and
 - b. A permanent employee at least annually on the employee's anniversary date or at another date as determined by the appointing authority.
2. The performance evaluation process includes, but is not limited to, using the PDP.
3. The employee's signature on the completed PDP acknowledges participating in the PDP process and receiving the PDP; the employee's signature does not indicate agreement with the content of the PDP.
4. The reviewer is the employee's second line supervisor and ensures the PDP process is followed and considers the PDP content, including employee comments.
5. After the reviewer signs the PDP, a copy with all signatures and comments is provided to the employee.
6. An employee's performance is not considered in lay-off decisions.
 - a. An employee may request a review of the PDP process only, including alleged irregularities in the use of the approved performance evaluation form and/or procedures. The employee will be notified in writing of the results of the review.
 - b. Washington General Service employees may request a review by the State Human Resources Director for alleged irregularities in the PDP form and/or procedures. Evaluation content is not subject to review.

E. Recognizing Outstanding Performance

Recognition and awards may be non-monetary. If monetary awards are considered, supervisors shall collaborate within administrative resources to ensure proper procedures are followed and limits considered (i.e., awards under RCW 41.60.150 and this policy are limited to \$200 in value per award).
