**Group 2: Knowledge of Personal and Social Responsibility**

**Subject Area:** "Humanities"

**Competency 29:** Develop an employee job description and evaluation form.

**Final Assessment:** Create an employee job description, an evaluation form, and a scenario where a manager could use this description to communicate and manage expectations as well as evaluate performance.

**Purpose of the Learning Module:** Mastery of this competency indicates a learner’s ability to address human capital needs by crafting a cogent job description and developing a process to evaluate the effectiveness of an employee. This process includes understanding the skills, educational requirements, and experience necessary to be successful in a chosen field so employers can clearly outline the skills needed to perform a job and attract the best and most qualified candidates. Learners will take a critical look at employee evaluation process with the expressed goal of creating an open workplace culture that embraces enhanced communication, diversity, inclusiveness, creativity and teamwork. Learners will examine how hiring managers who succumb to personal bias and negative stereotypes can overlook the best and most qualified job candidates and make improper decisions during the employee evaluation process.

**Learning Outcomes for the Learning Module:** Upon successful completion of this learning module, learners will be able to:

1. Outline different components to a job description.

2. Describe key recruitment concepts.

3. Design a complete and well-articulated job description.

4. Demonstrate a complex understanding of the relationship between employee performance and employer expectations, to create an employee evaluation.

5. Present examples of bias and stereotypes in the hiring practices.

6. Apply various human resources concepts.

**Unit 1 The Anatomy of a Job Description**

In the same way that a syllabus helps students understand what will be required of them in a class (assignments, deadlines, grading, etc.), a job description serves as a blueprint for the potential employee. It helps job candidates identify whether a company and job position aligns with their goals, skills, and principles. For an employer, a job description serves as a filter, which helps them sift through potential candidates to find the best “fit.”

A well-written job description will provide both the employer and the employee with information about:

* The company or organization description and culture.
* The job title and position summary.
* The job duties, responsibilities and employer expectations.
* The required and preferred competencies or knowledge, skills and abilities.
* The required and preferred educational qualifications and non-degree certifications.
* The benefits and other incentives employees receive for working at the company or organization.

It is important to remember that since employers are looking for the best candidates to fill a position opening at their company or organization, they are usually competing with other organizations to attract the best employees. They are more likely to attract the candidates they are looking for if they craft a job description that is written accurately and clearly, and if it is compelling to potential employees.

Throughout this unit, you should think about what you would include in a job description you will create for a hypothetical position opening. This position can be one you are already familiar with, one you have had yourself, one you hope to obtain one day, or another position that might require you to conduct some research to compose the pieces of a description you will learn more about below. Likewise, you should think about what sort of company or organization would have a need for this position.

This video provides some background and advice for building a team that will include individuals that complement the skills, abilities, and culture in your organization.

OER Resource Title: “Building a Team—4 Tips to Build Your Dream Team,” Evil Genius Leadership Consultants

OER Resource Link: <https://www.youtube.com/watch?v=7XIcVJX87jw>

Creative Commons License: by

This article offers an overview of how to write a job description.

OER Resource Title: “Writing the Job Description,” by the Bridgespan Group

OER Resource Link: <https://www.bridgespan.org/insights/library/hiring/nonprofit-hiring-toolkit/writing-the-job-description>

Creative Commons License: by 4.0

**A. The Company or Organization Description**

The description of the company within a job description can be as important, if not more so, than the actual position description. Many job candidates apply to work at a company because it has a good reputation, location, benefits, organizational culture, opportunities for advancement, and other attractions, even if the position for which they are applying is not exactly what they are seeking.

It is important for you to think about how you want to position and represent your organization as you craft your job description. You should explicitly integrate the mission of the company or organization into your job description in some way to be sure that candidates’ values align with the organization.

**1. Company or Organizational Mission**

This chapter discusses how organizations position themselves by defining their role, mission, vision and values. Including the company or organization’s mission statement in your job description can provide important context for the job candidate in terms of what the organization seeks to achieve.

OER Resource Title: Chapter 4.2 The Roles of Mission, Vision, and Values, from *Principles of Management*

OER Resource Link: <https://saylordotorg.github.io/text_principles-of-management-v1.1/s08-02-the-roles-of-mission-vision-an.html>

Creative Commons License: by nc sa 3.0

Here is an example of a job description that incorporates the organization’s mission statement into its introductory statement. This description gives a job candidate the opportunity to decide whether they are interested in working for an organization whose expressed goal is to pursue racial and economic justice in the Jewish tradition.

OER Resource Title: “Jews for Racial & Economic Justice Seeks Community Organizer (NYC),” from the Murphy Institute

OER Resource Link: <http://murphyinstituteblog.org/2017/03/07/jews-for-racial-economic-justice-seeks-community-organizer-nyc/>

Creative Commons License: by nc sa 3.0

In this job description, the mission statement for the Berkman Klein Center is listed under the heading, “organization.”

OER Resource Title: “Job Opportunity: Work with Jonathan Zittrain as a full-time Research Associate,” from the Berkman Klein Center

OER Resource Link: <https://cyber.harvard.edu/getinvolved/staff/jzra>

Creative Commons License: by 3.0

**2. Corporate or Organizational Culture**

Corporate or organizational culture refers to the general beliefs, attitudes, values, and behaviors that a company or organization promotes among its employees. This culture often dictates how the employees dress, act, perform their jobs, and treat their co-workers and customers. Potential job applicants often cannot determine the culture of the organization from the job description alone, although certain clues will help them discern some of these elements.

If you do not have control over the website that will house your job description, you will have to rely on the context the current site provides. Think about others ways you can provide additional information about the company or organizational mission and culture in your description, to give job candidates an accurate and attractive impression.

The authors of the following study found that employees are happier working in environments that foster interaction, communication and collaboration with leaders to accomplish the organization’s stated mission and objectives.

OER Resource Title: “Relationship between Organizational Culture, Leadership Behavior and Job Satisfaction,” by Yafang Tsai

OER Resource Link: <https://bmchealthservres.biomedcentral.com/articles/10.1186/1472-6963-11-98>

Creative Commons License: by 2.0

As a way to introduce the company culture to future employees, the following job description offers a great deal of information about the history, activities and focus of the Chicago Religious Leadership Network so job candidates have an idea of what to expect. As you review the other examples of job descriptions we list throughout this module, you will notice that many hiring managers provide similar information to alert those who apply to work at their company or organization.

OER Resource Title: “Executive Director Job Description,” from Chicago Religious Leadership Network on Latin America

OER Resource Link: <http://www.crln.org/EDjobdescription>

Creative Commons License: by nc 3.0

**B. Elements to Include in the Position Description Section**

Here are some basic elements you should incorporate into your job description to specifically address the position for which you are hiring. Each section brings greater clarity to the role the job candidates will perform if they are hired. Applicants should be able to use the position description to assess whether they could be a good fit for the organization and for the specific position opening.

**1. Job Title and Position Summary**

Most job descriptions begin by offering a short description or summary of the position to give job applicants a quick understanding of what it will entail—so applicants have an idea of whether they should apply. This summary provides a quick overview of the position, without too many details, which the applicant will be able to review in the list of duties and responsibilities that follow.

For example, in this job description, which advertises an opening for a paraprofessional at the Texas School for the Blind and Visually Impaired, the “general job description” is only two sentences. The first sentence describes the position, followed by the “goal” the organization has for their new employee: to facilitate instruction and help students interact with their environment.

OER Resource Title: “Paraprofessional A,” from the Texas School for the Blind and Visually Impaired

OER Resource Link: <http://www.tsbvi.edu/tb-jobs/tb-para-a>

Creative Commons License: by nc 4.0

Sometimes employers will want to provide a little more background information about the job opening in this section, especially if the position is not one that is common across industries and might be difficult for the applicant to understand quickly in the three- or four-word title.

In this “job summary” for an orientation and mobility specialist, the Texas School for the Blind offers more background than the job listing above, so the applicant knows more of what to expect. For example, this employee will travel to different schools and homes to evaluate students.

OER Resource Title: “Orientation and Mobility Specialist,” from the Texas School for the Blind and Visually Impaired

OER Resource Link: <http://www.tsbvi.edu/tb-jobs/tb-oma>

Creative Commons License: by nc 4.0

**2. Relationships with Other Employees**

Since most jobs require people to work with others, job descriptions should articulate how employee will work together toward a common goal, and whether the new employee will manage or supervise any co-workers. Candidates need to know this so they can decide whether they would like to work in this type of environment, and whether they have the team-working or managerial abilities to succeed.

For example, as this job description for a VI teacher details, the new employee will not only evaluate students at the Texas School for the Blind, but they will work with and consult other team members, parents, rehabilitation service providers, and others. They will also serve as a liaison with staff members at other schools, camps and community organizations.

OER Resource Title: “VI Teacher,” from the Texas School for the Blind and Visually Impaired

OER Resource Link: <http://www.tsbvi.edu/tb-jobs/tb-tvi>

Creative Commons License: by nc 4.0

**3. Job Duties and Responsibilities**

Employers use this section of the job description to outline and define the basic parameters of the job, with a listing of the most important job duties the employee will perform when hired, followed by the type of competencies or skills the employee should have to perform these duties well, in accordance with expectations.

Hiring managers typically list the job duties and responsibilities section as a bulleted list. This way the words and actions the new employee will be expected to perform are easier for job applicants to grasp quickly and understand. To make it easier to read, each responsibility usually begins with a present tense, action verb, again so job candidates can easily read, comprehend, and determine whether they are qualified to perform these tasks.

Here are some sample job descriptions where the “essential job functions” are clearly defined.

OER Resource Title: “Current Job Vacancies and Application Information,” by Texas School for the Blind and Visually Impaired

OER Resource Link: <http://www.tsbvi.edu/human-resources/1229-current-job-vacancies-and-application-information>

Creative Commons License: by nc 4.0

Note that some employers present the percentage of time applicants should expect to devote to each task in the list of job duties and responsibilities, so job applicants will know exactly what they should expect when they are hired.

So for example, applicants might expect to spend the majority of their time performing administrative tasks for a company (maybe 80-90 percent), and only a small percentage of their time writing articles for the organization’s monthly journal (maybe 10 percent). This clarifies to the candidate, that they might want to pursue a different job opportunity if they want to write articles all the time.

**C. Required Competencies: Skills, Knowledge, and Abilities**

The Oxford Dictionary defines competencies as “the knowledge, skills, abilities, personal characteristics and other ‘worker-based’ factors that help differentiate superior performance from average performance under specified circumstances. Competencies are identified to clearly define the essential functions of the job.’”

As a student in the CBE [Program Name Placeholder], you should be acutely aware of what competencies are and their value in signaling expertise to employers. In this module, you are approaching competencies from the other side of the job market divide. Not only do competency statements allow students to communicate what they are capable of, but they also allow employers to effectively explain to a potential applicant what skills they need to be successful in a given role.

As you craft the required competencies section of your job description, you should address what will be needed for job candidates to work at your company and successfully perform the specific job duties and responsibilities you have listed elsewhere in the job description. Note that many federal government agencies call this section of a job description, “knowledge, skills and abilities” or KSAs.

Keep in mind that you are hiring a person, not a role. Once you are clear about the kinds of skills your job candidate will be required to perform, construct an image of a person who could successfully perform that role. Remember to think about any qualifications the person in this position should have in the future, since the scope of his or her duties could change, according to new needs, such as in response to changes in technology, etc.

Your list of competencies should be succinct, but fully describe the ideal qualifications job candidates should have, so you can attract the most appropriate applicants and protect against future misunderstandings and disputes.

This article describes how competencies should be incorporated into a job description, including how to separate the different types of skills, knowledge, abilities, and behaviors that will be required. We will discuss these traits in more detail below.

OER Resource Title: “Competency-Based Hiring and Transferable Skills,” from Commongood Careers

OER Resource Link: <http://commongoodcareers.org/articles/detail/an-introduction-to-competency-based-hiring>

Creative Commons License: by nc nd 2.5

**1. Knowledge, Skills and Abilities**

Hiring managers are tasked with discovering whether a job candidate has the ability to perform specific job tasks and has the requisite knowledge and understanding to perform a given job. For example, can the job candidate use computer programs like Microsoft Office and navigate the Internet; employ coding languages to build a customized website; conduct research, analyze data, or write an article; or know how to perform certain accounting procedures?

In many cases, job applicants can take a simple test to demonstrate their skills, talk knowledgeably about their abilities, show they have passed a certain technical certification course, or present examples of how they have applied their skills and abilities in the past.

Here is a sample job description for a systems administrator at the Berkman Klein Center that lists the many technical computer abilities job candidates should have in the section, “basic qualifications” and “additional qualifications.”

Note that this job description also describes the culture of this workplace, as we mentioned above, in the section, “How we operate and expect you to participate” and the heading, “At the Berkman Klein Center, geekery is respected. In addition to the bump to your geek street cred, you’ll get …” These elements all offer clues a job seeker can use to determine whether they would like to work at this organization.

OER Resource Title: “Job Opportunity: Systems Administrator,” from the Berkman Klein Center

OER Resource Link: <https://cyber.harvard.edu/getinvolved/jobs/sysop>

Creative Commons License: by 3.0

The following research study offers more background about the need for employees to exhibit certain skills and abilities in today’s “knowledge” economy (which the authors describe as an economy that is based on “creating, evaluating, and trading knowledge”).

OER Resource Title: “Relationship among Soft Skills, Hard Skills, and Innovativeness of Knowledge Workers in the Knowledge Economy Era,” by Achmad Fajar Hendarmana and Jann Hidajat Tjakraatmadjab

OER Resource Link: <http://www.sciencedirect.com/science/article/pii/S1877042812038943>

Creative Commons License: by nc nd 3.0

**2. Other Types of Professional and Interpersonal Communication Skills**

Many jobs require their employees to have other types of professional abilities or competencies, which many describe as “soft” skills. These may include the ability to schedule and manage work responsibilities in a time efficient manner, exhibit self-confidence when communicating with customers, be able to solve problems quickly, be able to think clearly or without distraction in a stressful situation, and have the ability to communicate effectively with customers and other employees, in a professional, friendly and positive manner.

For example, job candidates may be required to exhibit diplomacy, consistency, flexibility, and creativity, as required as they perform their respective job responsibilities.

This series of short videos presents some workplace scenarios that demonstrate how to recognize these other types of professional abilities or competencies and interpersonal skills in a workplace setting.

OER Resource Title: “Synopsis,” from US Department of Labor

OER Resource Link: <https://www.youtube.com/watch?v=OwPArMTI9i8>

Creative Commons License: by 3.0

OER Resource Title: “Communication,” from US Department of Labor

OER Resource Link: <https://www.youtube.com/watch?v=X0voPlW2pSs>

Creative Commons License: by 3.0

OER Resource Title: “Networking,” from US Department of Labor

OER Resource Link: <https://www.youtube.com/watch?v=ZcOCJbvUY-w>

Creative Commons License: by 3.0

OER Resource Title: “Professionalism,” from US Department of Labor

OER Resource Link: <https://www.youtube.com/watch?v=7dPWVjQSad4>

Creative Commons License: by 3.0

OER Resource Title: “Critical Thinking and Problem Solving,” from US Department of Labor

OER Resource Link: <https://www.youtube.com/watch?v=hPiI44XEKgs>

Creative Commons License: by 3.0

OER Resource Title: “Teamwork,” from US Department of Labor

OER Resource Link: <https://www.youtube.com/watch?v=sMFh9QYFh2I>

Creative Commons License: by 3.0

Here is a sample job description for a communications manager at the Berkman Klein Center, which describes many personal skills, such as community building and leadership abilities, that their ideal candidate should exhibit.

The person they hire will work alongside a small team, with other members of the center’s community, to develop and implement a communications plan. It states, “You will play a central role in advancing the Center’s mission, ‘scholarship with impact,’ by spearheading communications efforts that better enable us to engage with our existing networks and create bridges to new communities, people, and communities.”

OER Resource Title: Job Opportunity: Communications Manager, from the Berkman Klein Center

OER Resource Link: <https://cyber.harvard.edu/getinvolved/jobs/communicationsmanager>

Creative Commons License: by 3.0

Notice that the following job description states that candidates should possess “heart, verve, and vigor; a can-do attitude; a very good sense of humor; and a strong desire to affect change in the world” in the section titled “additional qualifications.” This statement also gives job candidates an idea about the organizational culture at the Berkman Klein Center.

Hiring manager have a difficult task determining whether applicants have the appropriate communication, interpersonal and personality-based skills to work in positions that require these skills since measuring and quantifying these abilities can be difficult, and sometimes even impossible.

Employers will often try to discern whether a job candidate has these personal skills or attributes through their professional recommendations, description of past work experiences, college activities, and civic engagement. During the interview process, employers often ask job candidates to describe how they have demonstrated or developed the personal skills they will need to employ in the new position. Hiring managers might also ask the job candidate how they would act in a given hypothetical workplace situation or require them to take a personality test to try and quantify these types of abilities.

**3. Educational Qualifications**

Hiring managers have certain ideas about the academic credentials and other types of educational certifications successful applicants need to have to perform their jobs well in their particular work environment. Often, these requirements are based on industry standards and the qualifications previous employees who served in the same position had (or did not have). This list can also reflect an employer’s biases or own cultural experiences, which we will discuss later in this learning module.

As you craft your job description, think about what your company needs and the type of person who could fulfill this role. This article offers a perspective on the benefits of merit versus education. What do you think about substituting experience for education?

OER Resource Title: “Degrees of Separation: Companies Shed Degree Requirements to Promote Merit Over Qualifications,” by Joshua Krook

OER Resource Link: <https://theconversation.com/degrees-of-separation-companies-shed-degree-requirements-to-promote-merit-over-qualifications-76150>

Creative Commons License: by sa

This job description offers an example of a position opening where the employer, Stony Brook University, requires applicants to have earned a master’s degree in education, information systems, social sciences or another related field to be considered for this position. It states that applicants should also have advanced knowledge of statistics, quantitative and qualitative research methodologies, teaching effectiveness, and rubric development: SPSS, SAS or similar analytical software.

OER Resource Title: “Library Assessment and Learning Outcome Specialist,” from Stony Brook University Libraries

OER Resource Link: <https://web.archive.org/web/20170609191908/http://library.stonybrook.edu/about-us/employment/library-assessment-and-learning-outcome-specialist/>

Creative Commons License: by nc 4.0

**4. Non-Degree Certifications and Credentials**

Many professions require (or prefer) that employees should have earned or acquired certain non-degree certifications or credentials to work in certain their field. Companies or organizations require these qualifications in order to follow these professional standards, to be in compliance with certain statewide or federal government regulations or licensure requirements, or because the company feels the additional credentials are necessary for their employees to succeed.

For example, in the state of Connecticut an acupuncturist needs to have taken 60 semester hours of approved postsecondary education *and* have passed an approved acupuncture program, to practice as an acupuncturist. In the state of Virginia, an optician needs to have taken a two-year course offered by a school of opticianry, *or* a three-year apprenticeship with one school year of related instruction, to practice as an optician.

Here is a listing of hundreds of professional certifications that employers might, or might not, require of their job candidates.

OER Resource Title: “Professional Certification,” from Wikipedia

OER Resource Link: <https://en.wikipedia.org/wiki/Professional_certification>

Creative Commons License: by sa 3.0

Here is an example of a job description that lists certain licensing requirements, including a requirement that employees will need to obtain CPR certification within 90 days of being hired (note that this job description should probably have stated this requirement more clearly since you have to read it carefully to notice this qualification).

OER Resource Title: “Education Data Specialist,” from Detroit Head Start

OER Resource Link: <http://www.detroitheadstart.com/job_post/education-data-specialist/>

Creative Commons License: by nc sa 4.0

**5. Required vs. Preferred Skills and Qualifications**

Some job descriptions delineate whether the qualifications, skills, or abilities they list in in their job description are “required” or “preferred.”

For example, some employers (and professions) require their employees to have earned certain academic credentials (such as an associate’s, bachelor’s, or master’s degree, or professional certification) in a specified discipline or field of expertise, because the knowledge or skills learned are considered essential to perform the job effectively.

Federal and state governments, consumer protection agencies, professional associations, industry standards, and individual employers often play a role in dictating whether employers make these requirements for their new employees. For example, physicians must be doctors of medicine to practice medicine, attorneys must have a *juris doctor* degree to practice law, and an air pilot must have the appropriate pilot’s license and have flown a certain number of hours to fly a commercial aircraft.

Meanwhile, employers can also list certain credentials or abilities as “preferred” or “desired,” but not “required” in their job descriptions to indicate they will rate a job candidate who has the preferred qualifications more highly than someone who lacks them. However, by stating the qualifications are preferred, as opposed to required, the employer indicates they are open to considering other factors when making their hiring decision, such as equivalent work experience or competencies. The employer is also likely open to training these job candidates to perform the skills they lack.

Here are examples of job descriptions that list “required,” “desired,” and “preferred” qualifications.

OER Resource Title: “Manager, Music Library,” from Stony Brook University Libraries

OER Resource Link: <https://web.archive.org/web/20170609202224/http://library.stonybrook.edu/about-us/employment/manager-music-library/>

Creative Commons License: by nc 4.0

OER Resource Title: “Democracy Collaborative Seeks Program Associate, Healthcare Engagement Program (Washington, DC),” from the Murphy Institute

OER Resource Link: <http://murphyinstituteblog.org/2017/04/14/democracy-collaborative-seeks-program-associate-healthcare-engagement-program-washington-dc/>

Creative Commons License: by nc sa 3.0

**D. Benefits and Other Incentives to Attract the Perfect Candidate**

Now that we have discussed the major elements you should include in your position description, you have the opportunity to showcase the benefits and rewards candidates will receive when they agree to work at your company or organization.

Think about your job description as a recruitment tool you will use to make your position opening (and your company or organization) as desirable as possible to attract the most qualified and competitive applicants.

Most companies and organizations offer their employees a variety of compensation and benefit packages to attract the best candidates and to create a comfortable and inclusive work environment. The employee handbook or manual should explain the details of these employee agreements, but many job descriptions list the highlights to invite interest and remain competitive with other employers.

This chapter offers a comprehensive description of pay and compensation strategies.

OER Resource Title: “Chapter 6.3 Types of Pay Systems”, from *Human Resource Management*

OER Resource Link: <https://saylordotorg.github.io/text_human-resource-management/s10-03-types-of-pay-systems.html>

Creative Commons License: by nc sa 3.0

**1. Salary**

Employers can list the salary (or the financial compensation the job candidate should expect to receive) in their job description as an exact amount, as a salary range, or as “commensurate with experience.” This last option indicates they will negotiate the final amount depending on the employee’s background and professional experience. Employers can define the salary as an annual amount, or as an hourly wage.

This chapter examines how employers calculate the compensation amount they will offer to their future employees. The amount can depend on a host of external and internal factors, such as:

* What the industry and their competitors are offering their employees to perform similar jobs,
* How much the company values the employee,
* Whether the employee will receive outside compensation for his or her work (such as external bonuses or tips), and
* Whether the company will offer an incentive program to encourage employees to work more efficiently or effectively, such as a percentage of sales (commission), or an annual bonus based on performance.

OER Resource Title: “Chapter 6.2 Developing a Compensation Package”, from *Human Resource Management*

OER Resource Link: <https://saylordotorg.github.io/text_human-resource-management/s10-02-developing-a-compensation-pack.html>

Creative Commons License: by nc sa 3.0

When you employ an individual to work at your company or organization, you are, in effect, entering into a legal or contractual agreement. Both employer and employee have certain legal and contractual obligations and responsibilities—as you agree to provide financial compensation or remuneration in exchange for their agreement to perform certain tasks for your organization or company.

As you craft your job description, it is important for you to think about how your employees will fit into the following categories. Making these terms explicit and clear, will help prospective job candidates decide whether they want to accept your offer to work at your organization, and will help both parties understand what is expected, in addition to what is legally-required according to government rules and regulations.

**a. Full Time vs. Part Time**

Will your employee work full time or part time? Full-time employees typically receive benefits, such as health insurance, paid sick and vacation leave, and tax benefits for childcare, retirement, and health savings. Part-time employees typically work half (usually 20 hours per week) to three-quarters (usually 30 hours per week) of a full-time schedule (usually 40 hours per week). They are typically ineligible to receive additional benefits.

This resource offers definitions for part-time, temporary and seasonal employees.

OER Resource Title: “Part Time, Temporary, and Seasonal Employees,” from FindLaw

OER Resource Link: <http://files.findlaw.com/pdf/employment/employment.findlaw.com_hiring-process_part-time-temporary-and-seasonal-employees.pdf>

Creative Commons License: by nc nd 3.0

**b. Exempt vs. Non-Exempt**

Employees are also grouped into “exempt” and “non-exempt” status, a categorization which describes whether they are eligible to receive overtime pay.

This resource offers definitions for exempt and nonexempt employees.

OER Resource Title: “Exempt Employees vs. Nonexempt Employees,” from FindLaw

OER Resource Link: <http://files.findlaw.com/pdf/employment/employment.findlaw.com_wages-and-benefits_exempt-employees-vs-nonexempt-employees.pdf>

Creative Commons License: by nc nd 3.0

This resource offers definitions for minimum wage and overtime pay, which are important legal constructs that governments define for the employers in their community. For example, the U.S. Congress, and many state governments, requires employers in their jurisdiction to pay their employees a certain minimum hourly wage, and to pay employees who work more than 40 hours per week one-and-a-half times their regular hourly wage.

OER Resource Title: “Minimum Wage and Overtime Basics,” from FindLaw

OER Resource Link: <http://files.findlaw.com/pdf/employment/employment.findlaw.com_wages-and-benefits_minimum-wage-and-overtime-basics.pdf>

Creative Commons License: by nc nd 3.0

**c. Employee vs. Independent Contractor**

Independent contractors are professionals who technically work for themselves, but lend their time and expertise to organizations for pay.

This article outlines the difference between an employee and an independent contractor.

OER Resource Title: “Employee Versus Independent Contractor,” from the Digital Media Law Project

OER Resource Link: <http://www.dmlp.org/legal-guide/employee-versus-independent-contractor>

Creative Commons License: by nc sa 3.0

**2. Types of Benefits**

Benefits can include group health insurance, dental insurance and vision plans, disability insurance, life insurance, wellness benefits, flexible spending accounts, retirement and 401K plans, vacation and sick leave**,** family and medical leave, childcare benefits, and education and tuition stipends. Again, the employee handbook or manual should explain the details of these employee agreements in full, but you can list these benefits on a job description to make the position more enticing to prospective applicants.

These elements are described in more detail in the following readings.

OER Resource Title: “Chapter 6.4 Other Types of Compensation”, from *Human Resource Management*

OER Resource Link: <https://saylordotorg.github.io/text_human-resource-management/s10-04-other-types-of-compensation.html>

Creative Commons License: by nc sa 3.0

OER Resource Title: “11 Employee Perks to Attract Top Creative Talent,” by Vladimir Gendelman

OER Resource Link: <http://www.companyfolders.com/blog/best-employee-benefits-job-perks>

Creative Commons License: by 4.0

OER Resource Title: “Chapter 20.3: The Flexibility Issue, Cafeteria Plans, and Flexible Spending Accounts”, from *Risk Management for Enterprises and Individuals*

OER Resource Link: <https://saylordotorg.github.io/text_risk-management-for-enterprises-and-individuals/s24-03-the-flexibility-issue-cafeteri.html>

Creative Commons License: by nc sa 3.0

Here is an example of a job description that includes a listing of benefits.

OER Resource Title: “Chief Technology Strategist, Harvard Library,” from the Digital Library Federation

OER Resource Link: <https://www.diglib.org/archives/5492/>

Creative Commons License: by nc 4.0

**E. Other Elements to Include in a Job Description**

Here are some other elements that many job descriptions fail to include. Adding them to your job description will make the responsibilities and benefits clearer to potential job candidates.

1. Job location—Where will the employee work?
2. Telecommuting opportunities—Can employees work from home or from a satellite office location (the employee manual or handbook should offer details on whether the employer will reimburse employees for special computer equipment, networking software, or high-speed Internet connections to telecommute)?
3. Travel requirements—Will the employee need to travel locally, nationally or internationally to perform his job successfully? Many job descriptions offer a percentage of time the employee will be expected to travel.
4. Start date (and end date in the case of a contractual position).
5. Timeline for the interviewing process (if known).
6. Contact information for the person the applicant should submit their resume to or ask questions.

**1. Collective Bargaining**

While the number of union members has decreased in the United States, the number is still significant (the percentage of wage and salary workers who were union members was 20.1 percent in 1983, and 10.7 percent in 2016 [according to the Bureau of Labor Statistics](https://www.bls.gov/news.release/union2.nr0.htm)). Consequently, you should understand what unions do, in addition to the process of collective bargaining, since unions still play an important role in many industries and states.

Collective bargaining describes a negotiation process that employers and employees undertake to regulate their salaries, working conditions, benefits and other aspects of workers’ compensation and rights. As a courtesy, employers should mention in a job description whether the employees who work at their company or organization participate in collective bargaining, and whether candidates for a specific position would belong to a specific union (often, employees within the same organization may be represented by different unions, depending on their specific job functions).

This next resource offers more information and context about collective bargaining in the United States.

OER Resource Title: “Chapter 12.2 Collective Bargaining”, from *Human Resource Management*

OER Resource Link: <https://saylordotorg.github.io/text_human-resource-management/s16-02-collective-bargaining.html>

Creative Commons License: by nc sa 3.0

**F. Putting It All Together**

Now that you have learned about the elements most employers include in their job descriptions, remember that you are writing for an audience (potential job candidates) and that you want to be clear, precise and convincing in your writing. Your goal is to attract the best future employee possible.

Let’s review the key questions you should ask yourself as you write your job description.

* What kind of culture describes the company or organization in which this job will function? Where does this position fall within the organizational hierarchy?
* What knowledge, skills, and abilities should your candidate possess in order to successfully perform the duties and responsibilities described?
* What benefits and incentives can your company offer to prospective applicants to encourage them to apply? Are these benefits appropriate for the skill level and qualifications you require?

Use examples from the individual sections provided earlier in this unit, as you review these job descriptions, which were written to attract employees in different types of industries.

Here is a compendium of job descriptions that include many of the elements described above, for jobs in different industries:

OER Resource Title: “Nonprofit Job Description Toolkit,” from the Bridgespan Group

OER Resource Link: <https://www.bridgespan.org/insights/library/hiring/nonprofit-job-description-toolkit>

Creative Commons License: by 4.0

**Unit 2 Job Evaluation or Performance Appraisal**

The performance expectations and list of responsibilities that are articulated in a job description will often form the basis for an employee’s job evaluation or performance appraisal. In addition, the letter employers send to newly-hired employees, the employee handbook, and the company or organizational policies and protocol, can also offer critical details about expectations and the employee appraisal process.

As you work through this unit, think about the elements of a job description we discussed in Unit 1, and how you might evaluate the job performance of someone you just hired to perform those same duties and responsibilities you listed in the job description. Think about the ways a company, organization, and new employee will benefit from the appraisal methods we will detail below.

This chapter presents a brief overview of how a performance evaluation system can work in practice to benefit a company or organization.

OER Resource Title: “Chapter 11.1 Performance Evaluation Systems,” from *Human Resource Management*

OER Resource Link: <https://saylordotorg.github.io/text_human-resource-management/s15-01-performance-evaluation-systems.html>

Creative Commons License: by nc sa 3.0

**A. Leadership that Promotes Clear, Consistent and Open Communication**

Before we describe the details of how to design and perform an employee performance appraisal, we will discuss some characteristics of leadership and organizational culture that can help produce a positive and productive employee evaluation.

**1. Create a Comfortable Working Environment**

Leaders who respect their employees, and create a work environment where co-workers feel valued and appreciated, will not only experience less turnover (an expensive proposition in which employees leave the company and new hires must be recruited and trained), but employees will also feel comfortable making recommendations, admitting shortcomings, and identifying errors without fear of negative retribution. These practices will give the organization an opportunity to make corrections, improve its service and management processes, and offer creative and innovative solutions to their customers.

This article describes how managers can create a happy work environment that is more comfortable and productive.

OER Resource Title: “Happiness Is…A Work Environment Where People Feel Good about Themselves and are Empowered to do their Best Work,” by Henry Stewart

OER Resource Link: <http://www.managementexchange.com/story/happiness-is%E2%80%A6-work-environment-where-people-feel-good-about-themselves-and-are-empowered-do-t-0>

Creative Commons License: by nc sa 3.0

**2. Encourage Diversity and Inclusiveness**

Fostering diversity in the workplace nearly always presents companies and organizations with a competitive advantage. Studies show that organizations that include employees who represent a range of ages, races, and ethnicities are more successful than those that do not. Just as the marketplace is becoming more diverse due to an increasingly global economy, the ideas and perspectives each individual brings to the workplace will often broaden an organization’s knowledge base and ability to address different situations and challenges.

Beyond providing organizations with a competitive advantage by promoting new ideas and creativity, encouraging inclusion within an organization can increase employee satisfaction and thereby reduce the high cost of employee turnover.

This article examines how a diverse workplace can increase productivity. The researcher offers a list of advantages she discovered for companies that have a diversified workforce.

OER Resource Title: “Workforce Diversity: A Key to Improve Productivity,” by Ankita Saxena

OER Resource Link: <http://www.sciencedirect.com/science/article/pii/S2212567114001786>

Creative Commons License: by nc nd 3.0

This article shares some tips for setting up a culture of diversity within a company or organization.

OER Resource Title: “Inclusive Culture a Must to Drive Diverse Workforce,” by People Matters

OER Resource Link: <https://www.peoplematters.in/article/diversity/inclusive-culture-must-drive-diverse-workforce-13158>

Creative Commons License: by nc sa 3.0

**3. Promoting Teamwork to Achieve a Common Goal**

Just as it is important to highlight the organizational mission in a posted job description, it is also important for companies and organizations to communicate how they are progressing to meet their stated mission and goals to existing employees—so they can feel like they belong to a team that is working together toward a common goal.

This chapter describes some factors that can help employees work together as a team. For example, a company can foster teamwork by encouraging staff members to depend on and trust each other, to help them realize that they work better together than individually, to support and promote one another, and to find ways to help foster a sense of enjoyment working on a team. Some organizations even encourage a leadership structure that rotates periodically so each team member has the opportunity to lead and share responsibility among the group.

OER Resource Title: “Chapter 8.2 Why Teamwork Works,” from *Exploring Business*

OER Resource Link: <https://saylordotorg.github.io/text_exploring-business-v2.0/s12-02-why-teamwork-works.html>

Creative Commons License: by nc sa 3.0

This video examines how effective collaboration, a holistic approach, interdisciplinary thinking (a method of creative thinking that encourages collaboration among disciplines), and divergent thinking (a method of creative thinking that involves exploring many possible solutions) have become critical elements for innovative problem solving in our complex environment. Good communication and understanding are vital for its success.

OER Resource Title: “Effective Team Work & Collaboration,” from TheArtmadillo

OER Resource Link: <https://www.youtube.com/watch?v=NsndhCQ5hRY>  
Creative Commons License: by nc sa 3.0

As we discuss the evaluation process in more detail below, keep in mind that managers can use this time as an opportunity to elicit feedback from their employees on how co-workers might work together more efficiently as a team, to complement each other’s strengths and weaknesses, and fill in any gaps in performance or service to their clients. Managers can also learn whether professional development activities could enhance the requisite knowledge and abilities of their staff members to make their team more cohesive and better able to serve their customer base efficiently.

**4. Supporting Professional Development**

Taking the time to encourage employees to develop their professional and leadership skills, and give them access to the resources they can use to help them achieve their educational and professional goals, can benefit employees and their employer. Again, managers can use the evaluation process as an opportunity to learn how to best enhance the skills and abilities of their employees.

Given professional development opportunities, staff members have an opportunity to obtain relevant and interesting work skills, expand their knowledge, learn to work more effectively, and pursue promotional opportunities. Companies and organizations also benefit from harnessing their employee’s ability to apply the new and innovative best practice models they learn about. The ability to participate in professional development opportunities often bestows a sense of belonging and pride among employees—because they know they are part of a team that is doing its best to improve their products, services, or impact.

The authors of this article describe how offering proactive and purposeful professional development opportunities to their staff allows their organization to stay abreast of the latest technologies to serve their students and community more effectively. The authors offer a framework leaders can incorporate into their employee evaluation processes to identify areas of growth with their staff.

OER Resource Title: “The BenefIT of Workforce Development,” by Brandon Bernier and Jaclyn Zavoral

OER Resource Link: <http://er.educause.edu/blogs/2017/4/the-benefit-of-workforce-development>

Creative Commons License: by nc 4.0

In addition to describing different types of professional development opportunities, the following comprehensive resource offers advice and details on how organizations can create an effective in-house staff training program.

OER Resource Title: “Section 7. Developing Training Programs for Staff,” from Community Toolbox

OER Resource Link: <http://ctb.ku.edu/en/table-of-contents/structure/hiring-and-training/training-programs/main>

Creative Commons License: by nc sa 3.0

**B. The Purpose and Rationale for a Job Evaluation or Performance Appraisal**

Companies and organizations use many appraisal styles to evaluate the work and performance of their employees and manage expectations. Their outlook often depends on their organizational leaders, board of directors, and the entire company/organization. A well-executed performance appraisal should provide useful data to the employee and to the organization, and suit the culture of the organization itself.

Here are some examples of the purpose and benefits of offering performance appraisals.

During these meetings employers have an opportunity to talk with and listen to their employees in a dedicated and fixed setting so they can work together to:

* Redefine employee goals and meet employee needs.
* Determine professional development needs of employees.

Performance reviews also offer employers and employees the opportunity to:

* Identify workflow issues.
* Clarify job demands.
* Revise organizational support of employee.
* Learn about employee perceptions of organizational goals, mission, and activities.

This resource discusses the purpose and benefits for instituting an employee performance appraisal process.

OER Resource Title: “Chapter 6.4 Motivating Employees through Performance Appraisals”, from *Organizational Behavior*

OER Resource Link: <https://saylordotorg.github.io/text_organizational-behavior-v1.1/s10-04-motivating-employees-through-p.html>

Creative Commons License: by nc sa 3.0

This resource explores how establishing realistic goals and objectives can play an important role in the employee development and evaluation process.

OER Resource Title: “Chapter 6.5 Using Goals and Objectives in Employee Performance Evaluation”, from *Principles of Management*

OER Resource Link: <https://saylordotorg.github.io/text_principles-of-management-v1.1/s10-05-using-goals-and-objectives-in-.html>

Creative Commons License: by nc sa 3.0

**C. Negative Perceptions of Performance Appraisals**

It is important to recognize that many managers and employees dread participating in the annual review process—some feel it is too punitive in nature or complain that it is a waste of time—especially if the leadership of the company or organization does not recognize that the process can be a valuable opportunity to open the lines of communication among their employees.

Managers should also be mindful that while some employees willfully accept credit for work they did not perform, others feel uncomfortable bragging about their accomplishments, do not want to blame their co-workers for shortfalls (such as a failure to meet a deadline), and do not want to offer negative feedback about their supervisor or colleagues.

Being mindful of these negative perceptions can help managers overcome them, to create a more positive and rewarding experience for their employees. The key is to have an open dialogue about the desired outcomes of the evaluation process and mutually agree on objectives and strategies to meet those goals.

For example, while this article seems to have a negative take on performance evaluations, the author is really suggesting ways that managers and employees can open up the lines of communication, so they are continually working on the goals of the annual evaluation—to create a constructive approach. Consider what can be learned from this constructive criticism of the process, so you can foster an environment that promotes better communication among employees.

OER Resource Title: “8 Reasons For Killing Annual Performance Reviews,” by Marton Jojarth

OER Resource Link: <http://www.managementexchange.com/hack/8-reasons-killing-annual-performance-reviews>

Creative Commons License: by nc sa 3.0

**D. The Evaluation or Appraisal Process**

**1. Choose a Process that Works for the Organization**

The evaluation or appraisal process a company or organization chooses to follow should align with the culture and needs of the organization. For example, a manager may choose to conduct annual evaluations because they feel more frequent meetings could be too disruptive or time-consuming, the job responsibilities are fairly static, or they know staff members regularly discuss progress and goals with each other in less formal ways.

However, other managers may prefer to create a more frequent, formal performance review process to confirm that everyone is performing effectively, shares the same understandings and expectations, and has a regular opportunity to ask questions and make suggestions about their work experience and work responsibilities. This regular communication can be especially valuable if employees meet infrequently, perhaps because they work remotely or independently (although technology can help companies overcome these physical communication barriers). Staff members may also need more frequent guidance when they are learning new skills or working on multiple projects.

For example, the author of this article recommends managers create a process to offer employees consistent and regular feedback and communication, rather than risk waiting to have these conversations during a one-time annual event.

OER Resource Title: “Performance Reviews Are a Process Not an Event,” by Sharlyn Lauby

OER Resource Link: <https://www.hrbartender.com/2016/employee-engagement/performance-reviews-are-a-process-not-an-event/>

Creative Commons License: by nc nd

In addition to discussing the need to create an appropriate timeframe for providing relevant feedback, this resource shares some rating scales managers typically use to evaluate performance, with a discussion of the need to provide “actionable feedback” in a timely manner, for past and future activities. This means that employees will be able to take action or the appropriate steps, based on the feedback they receive, to improve their performance and ensure their work aligns with the expectations and culture of the organization.

OER Resource Title: “How to Conduct an Employee Performance Review,” by NOBL

OER Resource Link: <http://futureofwork.nobl.io/future-of-work/use-a-google-inspired-process-to-improve-annual-performance-reviews>

Creative Commons License: by sa

Keep in mind that managers sometimes incorporate technology tools, such as Skype or another videoconferencing platform, to facilitate face-to-face conversations with their employees, if they work remotely and meeting in a central location would prove difficult. Ideally, the technology used should allow participants to see non-verbal communications, such as facial expressions, hand gestures or other types of body language, that convey meaning, thoughts or feelings. This will help reinforce the ability of each participant to understand the meaning of the words the other person is trying to communicate.

For example, does the listener seem confused about what the speaker is saying? Perhaps the speaker needs to rephrase their statement. Does each participant seem engaged in the conversation and seem to comprehend the importance of the words they are hearing? Using technology that supports these visual communication cues can help.

**E. Methods of Evaluation and Appraisal**

**1. Components of Evaluation and Appraisal**

Let’s discuss some of the more common components of an employee evaluation or appraisal process, which companies and organizations can adapt to fit into their particular process or timeline.

**a. Employee Self-Evaluation and Reflection**

Many companies or organizations begin their appraisal process by asking their employees to offer a self-evaluation, so they have an opportunity to reflect on their past performance, express concerns, identify areas for desired professional development, and recommend improvements.

The following self-evaluation tools can also help guide managers in asking the right questions.

OER Resource Title: “Rise Model for Self-Evaluation,” by Emily Wray

OER Resource Link: <http://elwray.squarespace.com/self-evaluations>

Creative Commons License: by nc sa 4.0

This article presents some questions employees should consider after they have worked in a new position for three months in advance of their performance evaluation, such as what they like about their new position and steps they can take to improve.

OER Resource Title: “After Your First 90 Days at a New Job,” by Jarie Bolander

OER Resource Link: <http://www.thedailymba.com/2010/08/30/after-your-1st-90-days-at-a-new-job/>

Creative Commons License: by nc nd 3.0

**b. Reviewing the Position Description**

After providing an opportunity for self-reflection, managers often begin their part of the evaluation process by examining the employee’s existing job description to determine whether the employee has performed the duties and responsibilities listed in a satisfactory or exemplary fashion according to expectations.

However, managers also need to keep in mind that the job description elements could be out-of-date or no longer relevant since most jobs change, according to the circumstances and needs of the company or organization. Accordingly, the performance review and appraisal process is an opportunity for managers and their employees to update the job description so it accurately reflects the current duties and responsibilities of the employee.

This article discusses how the job description can provide a starting point managers can use to begin evaluating the performance of their employees.

OER Resource Title: “Chapter 3: Job Descriptions,” by KC Dignan

OER Resource Link: <http://www.tsbvi.edu/tb-jobs>

Creative Commons License: by nc

**c. Confirming and Revising Goals**

The evaluation process offers an opportunity for managers and employees to create and agree to a list of goals or objectives they plan to accomplish between this evaluation and their next. Both sides should be realistic about whether these goals are attainable within the given timeframe and they should agree on how they will measure whether the objectives have been met. Will the endeavor include cooperation and involvement from other employees or the changing needs of a client? Relevant staff members need to be involved (although probably during a different meeting), and everyone should have a clear understanding of their duties, responsibilities, and expectations.

During subsequent appraisals, managers can determine whether the employee was able to meet these same or revised goals or whether the goals may have been unrealistic or unattainable and need to be revised or modified.

As this article explains, goals should be specific, measureable, achievable, realistic and time-related.

OER Resource Title: “Reading: Performance Appraisals,” by Linda Williams and Lumen Learning

OER Resource Link: <https://courses.lumenlearning.com/wmintrobusiness/chapter/reading-performance-appraisals/>

Creative Commons License: by sa 4.0

**d. Determining Professional Development Needs and Goal Achievement**

As mentioned above, the employee evaluation process offers the opportunity to discuss whether participating in training or professional development opportunities could help employees meet their goals or better perform their duties and responsibilities.

This article offers a framework managers can use to help leverage learning opportunities at their organization to enhance employee performance.

OER Resource Title: “Leaders Learning about Learning,” by Stephen J. Gill

OER Resource Link: <http://stephenjgill.typepad.com/performance_improvement_b/2016/03/leaders-learning-about-learning.html>

Creative Commons License: by 3.0

This article discusses the importance of fostering a learning culture in the workplace to help employees, companies and organizations succeed.

OER Resource Title: “Becoming a Learning Culture: Competing in an Age of Disruption,” by Stephen J. Gill

OER Resource Link: <http://stephenjgill.typepad.com/performance_improvement_b/2017/02/becoming-a-learning-culture-competing-in-an-age-of-disruption.html>

Creative Commons License: by 3.0

This article presents 50 examples of workplace learning opportunities.

OER Resource Title: “50 Ways to Lever Learning,” by Stephen J. Gill

OER Resource Link: <http://stephenjgill.typepad.com/performance_improvement_b/2015/12/50-ways-to-lever-learning.html>

Creative Commons License: by 3.0

**e. Tips for Giving and Receiving Feedback**

Most companies and organizations ask their managers to evaluate and assess the work performance of the employees they supervise during a given time period (such as during the past year if the review is conducted annually). This gives staff members the opportunity to set expectations, provide feedback, identify areas of concern and room for improvement, determine new responsibilities, and set goals for future growth within the company.

Since offering this type of feedback can be uncomfortable for many managers, Jason LeDuc presents five tips managers can use to build upon the positive experiences they have had with their employees (where they have met or exceeded expectations) and make giving feedback a more pleasant experience.

OER Resource Title: “Giving Great Employee Feedback—5 Tips for a Positive Experience,” by Evil Genius Leadership Consultants

OER Resource Link: <https://www.youtube.com/watch?v=r8OwM_bxl4k>

Creative Commons License: by

Remember that the evaluation should ideally be an opportunity for managers and their employees to have an open, two-way discussion or conversation in which the employee also offers feedback about the positive and negative aspects of his or her job. This video presents tips on how managers and employees can solicit and receive formal and informal feedback from their peers and co-workers to learn how well they are accomplishing their own mission and goals, and how well they perform as a leader within their organization.

OER Resource Title: “Episode 23—Receiving Feedback,” by Evil Genius Leadership Consultants

OER Resource Link: <https://www.youtube.com/watch?v=XLZaGUQiZ9g>

Creative Commons License: by

**f. An Opportunity for Peer and Co-Worker Feedback**

Some, but not all, companies and organizations invite their employees to evaluate the job performance of their co-workers and managers. This type of assessment is called “360 Feedback.” This feedback can be especially useful when staff members work together on teams or otherwise collaborate on projects, as it allows everyone to share their understanding or expectations for how they can work together effectively to best complement each other’s skills and abilities, and meet the expected goals, outcomes, and overall mission of the organization.

OER Resource Title: “360 Feedback Tools: How to Get the Most Value,” from The Bridgespan Group

OER Resource Link: <https://www.bridgespan.org/insights/library/leadership-development/360-feedback-tools-how-to-get-the-most-value>

Creative Commons License: by 4.0

This video complements the videos we viewed above with some additional tips managers can use to encourage feedback and discussion about expectations among their employees, peers, and co-workers in formal and informal settings.

OER Resource Title: “Episode 22—Feedback,” by Evil Genius Leadership Consultants

OER Resource Link: <https://www.youtube.com/watch?v=hakiW8gLLEA>

Creative Commons License: by

**g. Considering Feedback from Customers and Other Stakeholders**

Some companies and organizations elicit feedback from their clients, customers, and vendors to obtain a more balanced and holistic appraisal of their employees. These types of assessments can be extremely valuable if they offer a proper and fair representation of the service customers and clients receive or if they otherwise describe how events take place when the manager is not present.

While it is generally important for companies and organizations to ensure customers and clients are happy with the service they receive, managers should view the customer feedback they receive with a critical eye since the person who is rendering his or her judgment could have unrealistic expectations, ulterior motives, or negative biases that could cloud their assessment.

For example, a student might give a professor a negative evaluation because are angry they received a bad grade for a course (even if it was deserved and fairly given). A customer could offer a negative evaluation because they were ill-informed, distracted by a previous or unrelated experience, or angry when the employee did not exempt them from a company policy that would have hurt or cost the organization. Similarly, customers can give glowing reviews, that are equally disingenuous, to help a friend or to receive favorable treatment. Managers need to evaluate whether their employees truly deserve this negative (or false positive) feedback when they evaluate their job performance.

This study describes how students disproportionately give their female professors lower evaluations that are unrelated to their teaching abilities, which the authors attribute to negative biases and stereotypes toward women.

OER Resource Title: “Student Evaluations of Teaching are Not Only Unreliable, They are Significantly Biased against Female Instructors,” by Anne Boring, Kellie Ottoboni, Philip B. Stark

OER Resource Link: <http://blogs.lse.ac.uk/impactofsocialsciences/2016/02/04/student-evaluations-of-teaching-gender-bias/>

Creative Commons License: by 3.0

**2. Performance Appraisal Rubrics**

Many companies develop a common rubric that reflects the key elements and skills they would like each of their managers to review and discuss with each of their employees. The goal is to help ensure each member of the team is judged consistently according to the same types of criteria.

While creating a rubric that details the responsibilities and tasks assigned to an employee can be challenging, it can demonstrate the importance of having a specific and detailed rubric that clearly states the expectations and responsibilities of the position. Furthermore, common rubrics can serve as an effective and efficient means of providing feedback for job performance, but they also work well when they are supplemented with frequent, formative conversations about employee performance and expectations. Rubrics should never take the place of these kinds of open conversations that managers have with their employees, but rather rubrics should work in tandem with these discussions to provide additional feedback and direction about the path to professional development and advancement for employees. Similarly, managers can use the performance assessment data to review and potentially revise the job description, responsibilities, or structure within the organization to better address the changing nature of many jobs

These two resources present examples of a rubric for employee appraisals.

OER Resource Title: “Appendix 7 – Sample Performance Evaluation Form,” from Human Resources in the Food Service and Hospitality Industry

OER Resource Link: <https://opentextbc.ca/humanresourcesinfoodservices/back-matter/appendix-7-sample-performance-evaluation-form/>

Creative Commons License: by 4.0

OER Resource Title: “Public Health Competency Based Employee Performance Management: A Guidebook for Managers and Employees,” OPHA & Partners

OER Resource Link: <http://phabc.org/wp-content/uploads/2015/07/Public-Health-Employee-Performance-Management-Guidebook-for-Managers-and-Employees.pdf>

Creative Commons License: by nc sa 2.5

This resource offers examples of some different appraisal tools employers can use to create a common and consistent process to evaluate employees and obtain feedback.

OER Resource Title: “Chapter 11.2 Appraisal Methods,” from *Human Resource Management*

OER Resource Link: <https://saylordotorg.github.io/text_human-resource-management/s15-02-appraisal-methods.html>

Creative Commons License: by nc sa

**3. When an Employee is Not Performing According to Expectations**

The performance review process will provide an opportunity for managers and employees to have a frank and open discussion, and explore and clear up any misunderstandings regarding expectations. It can also be used to help direct an employee who is struggling or unhappy onto a more productive path.

This video offers five reasons managers should talk openly with employees they consider to be a poor performers.

OER Resource Title: “Communication Skills: 5 Reasons to Tell the Hard Truth to Underperformers” by Dianna Booher

OER Resource Link: <https://www.youtube.com/watch?v=QHnKU6MOGu0>

Creative Commons License: by

This article also offers advice on how to have a conversation with an employee who is not contributing to the company or organization as well as expected.

OER Resource Title: “How to: Have a Performance Conversation with an Employee,” by Sharlyn Lauby

OER Resource Link: <https://www.hrbartender.com/2013/employee-engagement/how-to-have-a-performance-conversation-with-an-employee/>

Creative Commons License: by nc nd 3.0

Companies will often have a policy of progressive discipline to respond to employee misconduct. Managers may be in the position where they need to have performance discussions with their underperforming. If that conversation does not lead to improvement, they can be responsible for documenting negative feedback, and collect the legal documentation they need to discipline or terminate an employee. The resource below details that process of escalation.

OER Resource Title: “Progressive Discipline and Termination Processes,” from *Human Resources in the Food Service and Hospitality Industry*

OER Resource Link: <https://opentextbc.ca/humanresourcesinfoodservices/chapter/progressive-discipline-and-termination-processes/>

Creative Commons License: by 4.0

**F. Putting It All Together**

Now that you understand the importance and benefits for conducting an effective job evaluation or performance appraisal—whether on a continual or annual or basis—think again about the job description elements we discussed in Unit 1. Note that in the next unit we will also discuss how to recognize, and take steps to avoid, elements of bias and negative stereotypes when creating a job description and evaluating employees for their performance.

Your evaluation methods can depend on the type of position you are evaluating, the expectations you have as a manager for the person who fills that role, and the qualities you deem essential to his or her successful performance. For example, if the employee interacts frequently with customers, offers customer support, and is expected to provide a high level of personal service you might create a way to obtain customer feedback. You might institute a process that offers employees continual professional development and training opportunities for positions where employees must respond frequently to new trends and marketplace changes.

Meanwhile, managers must judge how much support or advice they should offer their employees to help them perform in accordance with their expectations, without dictating their every move and causing employees to feel constrained, or to feel as if their own ideas, creativity, and individual work efficiencies are unappreciated.

How would you evaluate the performance of the person you hired to work according to the position description you drafted in Unit 1 of this module?

* What are the most important things to consider when you conduct this evaluation?
* What expectations do you have for this person and how would you communicate with them to make sure they are on the right track?
* How would you ensure that you, as a manager, share the same expectations and understandings with the employee, so they can succeed?
* How will you create an environment that encourages employees to offer their feedback, ideas and thoughts about their contributions, the work environment, and their position within the company or organization.
* How would you evaluate their performance?

Here is an example of a performance evaluation form.

OER Resource Title: “Appendix 7—Sample Performance Evaluation Form,” from *Human Resources in the Food Service and Hospitality Industry*

OER Resource Link: <https://opentextbc.ca/humanresourcesinfoodservices/back-matter/appendix-7-sample-performance-evaluation-form/>

Creative Commons License: by 4.0

**Unit 3 Stereotypes and Bias in the Hiring and Employee Evaluation Process**

Let’s take some time to discuss stereotypes and bias in the workplace, whether you are preparing a job description, hiring an employee, or creating a fair evaluation process. Negative stereotypes and biases can play an important role in many aspects of employment, by creating blind spots that lead to bad decision-making and discriminatory practices. The more mindful we are about how these preconceptions manifest themselves, the better prepared we will be to recognize them, respond appropriately, and mitigate any potential negative impact.

In interpersonal situations, we often rely on stereotypes when we make judgments about individuals. A stereotype is an assumption that *every* member of a group shares characteristics that *some* members of the group might have.

For example, research shows that on average, men are five percent better at parallel parking than women. A stereotype would be the belief that John can park better than Jane because he is male. However, the averages might not apply to these individuals.

This resource distinguishes between blatant stereotyping, and newer, more-subtle, biases, prejudices and discrimination.

OER Resource Title: “Prejudice, Discrimination, and Stereotyping,” by Susan T. Fiske

OER Resource Link: <http://nobaproject.com/modules/prejudice-discrimination-and-stereotyping#content>

Creative Commons License: by nc sa 4.0

**A. Gender-based Stereotypes**

The following article discusses gender-based stereotypes and its related concepts, including sex, gender roles, gender identity, sexual orientation, and sexism. The authors argue that significantly fewer gender differences exist, as compared to the many stereotypes people have for men and women.

OER Resource Title: “Gender,” by Christia Spears Brown and Jennifer A. Jewell

OER Resource Link: <http://nobaproject.com/modules/gender>

Creative Commons License: by nc sa 4.0

**B. Age-Related Stereotypes**

People often make judgments about others based on age-related stereotypes. For example, some employers think older employees are less capable of learning new software programs or technologies, or that younger workers feel more entitled or deserving, and are more likely to complain about tasks they feel are more suitable for those who are who are less educated than they are.

The following research review examines three studies that consider age-related stereotypes and show that: (1) employers view older job candidates less favorably as new job hires, (2) employers tend to prefer younger job candidates, even for low-status jobs, and (3) employers only consider hiring older job candidates when their position would be subordinate to a younger candidate.

OER Resource Title: “Old and Unemployable? How Age-Based Stereotypes Affect Willingness to Hire Job Candidates,” by Dominic Abrams, Hannah J. Swift, and Lisbeth Drury

OER Resource Link: <http://onlinelibrary.wiley.com/doi/10.1111/josi.12158/full>

Creative Commons License: by

**C. Culturally-based Biases and Stereotypes**

Most of us carry subtle, unconscious biases and prejudices that impact how we treat others. We often base the decisions we make regarding those who have different ethnic, racial, cultural or religious backgrounds on these preconceptions.

For example, we can be quick to take offence—and paint an unwitting perpetrator as rude, disrespectful, or worse—when those from different cultural backgrounds have crossed certain cultural norms. For example, in Asian cultures it is considered disrespectful for younger employees to make eye contact with an elderly person when conversing with them. On the other hand, Americans often perceive those who avert their eyes when speaking as lacking self-confidence or hiding something.

Australia’s Queensland Health wrote the following guidebook to help prevent their health professionals from making bad assumptions or decisions regarding their patients and co-workers. The Australian caregivers advise that “before you can begin to have insight into diverse communities, individuals and groups, you need to understand and know your own culture and identity, whether this is your personal ethnic, spiritual or cultural heritage or your professional or organizational affiliations. Evidence has shown that our attitudes, whether we are conscious of them or not, have a direct and significant impact on the people around us.”

The Australian clinician manual states, “It is impossible to know all the different rules that might exist across different cultural groups. However, it is possible to approach your work with the understanding that different and complex cultural conventions exist, and to seek out these conventions in order to both improve understanding, to adapt to whatever cultural codes you encounter, and to avoid incorrectly attributing negative characteristics onto a particular group or person.”

OER Resource Title: “Five Cross Cultural Capabilities for Clinical Staff,” by Queensland Health

OER Resource Link: <https://www.health.qld.gov.au/multicultural/health_workers/CCC-clinical.pdf>

Creative Commons License: by nc

**D. Legal Ramifications of Stereotypical Decision Making**

Employers can be legally punished or sued for making decisions or taking actions that discriminate against their employees based on race, color, religion, sex (including pregnancy, gender identity, and sexual orientation), national origin, age (40 or older), disability or genetic information.

This resource provides some historical background and outlines the rights and responsibilities of employees and employers in the United States.

OER Resource Title: “Federal Employment Discrimination Laws,” from Business and the Legal Environment

OER Resource Link: <https://courses.lumenlearning.com/buslegalenv/chapter/16-1-federal-employment-discrimination-laws/>

Creative Commons License: by nc sa

**D. Avoid Bias and Stereotypes—In Job Descriptions and Employee Evaluation**

Think about the ways you can avoid negative bias and stereotypes in the workplace. For example, for the purposes of this learning module, you should choose words that are gender neutral to incorporate into your job description. Have you communicated effectively and clearly to everyone? Do you give all of your job candidates and employees a fair and equal opportunity to succeed and meet your performance expectations?

Employment laws can impose harsh penalties on employees, companies and organizations that promote negativity, bias, and foster stereotypical behavior. Meanwhile, litigation and defending oneself against internal and external charges can also be internally divisive, expensive and time-consuming.

On the other hand, today’s companies and organizations have many practical and self-serving reasons for creating and promoting a diverse and inclusive workplace environment. As we have discussed above, as the population becomes evermore global and dynamic, companies and organizations that invest in leadership and procedures that welcome all types of employees are often able to realize a distinct competitive economic advantage.

A diverse workforce helps promote:

* A workplace community that welcomes new and relevant perspectives, ideas, and strategies to encourage creative decision-making and effective problem solving;
* A workplace community that is able to relate to, and more-readily understand, a diverse and globally-aware client base; and
* A workplace community where employees feel comfortable and welcome working together as a team in an open and friendly environment.

The following chapter identifies how employers can enhance diversity and inclusiveness in their workplace environment to help them avoid making biased and stereotypical decisions.

OER Resource Title: “Section 7. Building Culturally Competent Organizations” from Community Tool Box

OER Resource Link: <http://ctb.ku.edu/en/table-of-contents/culture/cultural-competence/culturally-competent-organizations/main>

Creative Commons License: by-nc-sa 3.0

Scroll to the section of this article, “How to Reduce Gender Discrimination in Organizations,” to get some ideas on how to enhance diversity and gender equity in the workplace.

OER Resource Title: “Gender Inequalities in the Workplace: The Effects of Organizational Structures, Processes, Practices, and Decision Makers’ Sexism,” by Cailin S. Stamarski and Leanne S. Son Hing

OER Resource Link: <https://www.frontiersin.org/articles/10.3389/fpsyg.2015.01400/full#h7>

Creative Commons License: by

This handout presents ideas for creating gender-inclusive language to include in your job description, questions, and other written materials for your employee appraisal process.

OER Resource Title: “Gender-Inclusive Language,” from the Writing Center, University of North Carolina at Chapel Hill

OER Resource Link: <http://writingcenter.unc.edu/tips-and-tools/gender-inclusive-language/>

Creative Commons License: by nc nd 2.5