

## PERFORMANCE APPRAISAL SYSTEM — ALERT #3

### Expectation Discussions

Expectation discussions (see Article 21, Section 5 of the national contract) are similar to the meetings supervisors initiated with employees at the beginning of appraisal periods under the pass-fail system of the last 17 years. However there are differences now that SSA workers will be rated by a three-tier plan: OUTSTANDING (5), SUCCESSFUL (3), or NOT SUCCESSFUL (1).

- Supervisors and employees are supposed to reach a *shared* understanding of what it takes to achieve a SUCCESSFUL rating.
- A new expectation discussion should occur whenever there is a change in supervisor, a detail, a change in component goals, or a return to duty following an employee's absence of 120 days or more.
- **Numerics** may now be used to define performance standards.

We don't know at this point if management will be prepared to explain definitively how employees can achieve SUCCESSFUL ratings, much less OUTSTANDING performance. A review of the PACS Performance Plan posted to SSA's intranet - ([this link is to a copy on our site - Cf. Library, Agency Performance Plans](#)) uses vague terms like "fair share," "balanced approach," "responds appropriately," and "maintains positive relationships." Employees must ask "what precisely do these terms mean?"

Chapter S430 of the Personnel Policy Manual (<http://ssahost.ba.ssa.gov/ope/pmisps/virtuallib/PACS.htm>) provides additional information about the performance necessary to obtain OUTSTANDING ratings, but, the deck may be stacked against most workers who interview. For example, performance standard *Achieves Business Results* indicates that an employee may be rated OUTSTANDING by making *a significant contribution to achievement of work unit goals by completing extra work assignments*. How do employees who are interviewing all day long complete extra work assignments? And, keep in mind, if you want an overall rating of OUTSTANDING, you must reach Level 5 on all performance standards.

**SSA workers should review PPM S430 now.** When management discusses performance standards and ratings, ask for details about how you can achieve SUCCESSFUL and OUTSTANDING ratings. Have management explain what they will be looking at to determine if your ratings deserve a Level 5.

#### AFGE Concerns

The union is concerned that employees will not have a clear understanding of what performance is required to reach SUCCESSFUL and OUTSTANDING ratings and that management's expectations may change without new discussions being held. We are also wary of arbitrary, numeric performance standards being introduced that are either unattainable or encourage unhealthy competition and dishonest work practices.

#### What You Can Do

Seek clarification of all ambiguous terms and goals during expectation discussions. If you do not share the same understandings as management, be sure to indicate that you do not understand or that you disagree. If management imposes unrealistic numeric goals, ensure that your opinion is noted. If you are asked to sign a receipt acknowledging that management conducted this expectation discussion and you still do not understand or agree with its contents, annotate the receipt accordingly...and don't forget to advise your AFGE Local Representative.

Visit [www.AFGEC220.org](http://www.AFGEC220.org) often for more information and background about performance expectation discussions.

July 2006