

# HR AS A BUSINESS PARTNER

Michele T. Walty, PHR, SHRM-CP



## WHAT IS HR?



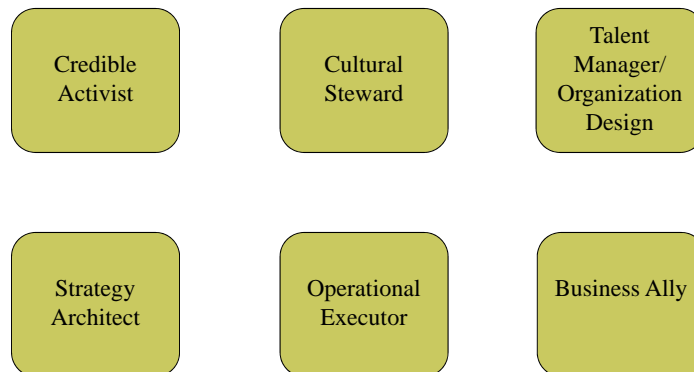
## HR – TRADITIONAL MODEL

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## HR – BUSINESS PARTNER MODEL

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## Credible Activist

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- ❑ Does HR “with an attitude”
  - Offers a point of view
  - Takes a position
  - Challenges assumptions
- ❑ Shares information
- ❑ Builds a relationship of trust
- ❑ Delivers results with integrity



## Cultural Steward

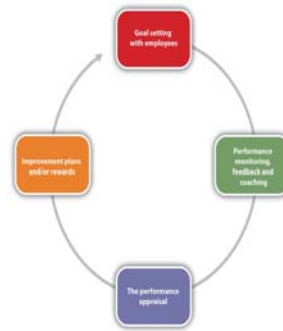
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- ❑ Creates a culture where knowledge is shared across the organization
- ❑ Creates organizations culture
  - Engages employees
  - Aligns behavior with organizational goals
- ❑ Personalizes the culture



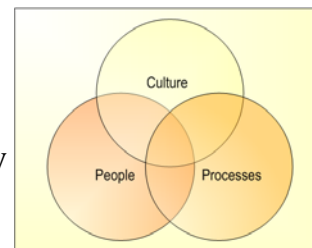
## Talent Manager/Organization Design

- Recruiting
  - Creates standardized process
- Designs non-financial and performance based rewards system
  - Performance Reviews
  - Service Awards
- Establishes clear roles
  - Job Descriptions
- Develops talent
  - Provides training - growth opportunities



## Strategy Architect

- Helps establish the business strategy and translates into business initiatives
  - Wellness Program
- Helps build the organizations brand
  - Standardized forms
- Facilitates Change – ensures key alignment and helps to create the need for change



## Business Ally

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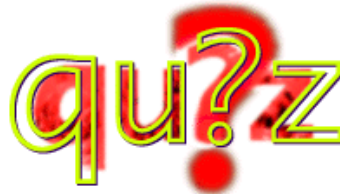
- ❑ Is financially literate – can read and understand a financial statement
- ❑ Understands the business' technology/processes
- ❑ Understands the customer
  - Your employees
- ❑ Knows the internal/external business environments



## Business Ally Quiz

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- ❑ What are the annual revenues of your organization?  
How do they make money?
- ❑ What are the objections/goals of your leaders and co-workers?
- ❑ Who are your organization's major customers?
- ❑ What is your organization's brand or desired reputation?



## Operational Executor

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- Implements workplace policies to deal with compliance issues
  - Allows for employee flexibility
- Uses information technology
  - Increases productivity
  - Helps with business decisions



## Questions?

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## Contact Information

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<b>115.1 Performance Reviews</b>	<b>Date: April 14, 2014</b>
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**The Policy Manual for Bastrop County is Not a Contract and is Not All-Inclusive.**

1. **Overview:** In order to comply with Section 115 – Department Heads, Directors, and Supervisors General Responsibilities of the Bastrop County Personnel Manual, a performance review will be completed for all employees at least one time per year. All reviews must be finalized no later than June 30<sup>th</sup> of the current fiscal year.

- a. A performance review is not necessarily linked with a salary increase; however, the Commissioner’s Court may refuse to fund salary increases unless the Performance Review process is complete.
- b. Supervisors may review performance more often than is required by this policy.
- c. All *original* Performance Review forms are maintained in the employee’s personnel file located in the Human Resources Department.

2. **Purpose:** Performance Reviews establish a performance history with the County and are used in performance, promotion, transfer, and merit increase decisions. In addition, they can be used as a guide for an employee’s progress in their current position, to discuss ways in which their performance can be improved, and, when appropriate, explore their potential for advancement.

3. **Process:**

- a. Annual Performance Reviews will be conducted each fiscal year. HR will distribute to Elected Officials, Department Heads, Directors and Supervisors the list of employees eligible for review. The Performance Review process should be completed by June 30<sup>th</sup>.
- b. After receiving the Performance Review list from HR, the employee’s Supervisor will forward the Performance Review form (or instructions how to access the form online) to the employee requesting they complete a self-evaluation. The Supervisor should also include a timeline with the document. The employee will forward the completed self-evaluation to their Supervisor for review.
- c. The Supervisor will review the Performance Review to ensure it is fair and consistent with the employee’s current job description. The Supervisor will also grade the employee’s performance, write comments supporting their evaluation, and set goals to enhance the employee’s job performance. A full review period is for twelve (12) months from the date of the last appraisal received. Unless the



employee has been employed less than twelve (12) months, then the full review period will be from the date of the last appraisal received, or hire date, whichever is most recent.

- d. The Supervisor will forward the evaluation to their Department Head/Elected Official for review. Department Heads/Elected Officials should address any questions with the Supervisor prior to approval. Any ratings that are below average should be addressed during the review. The Department Head/Elected Official will forward the approved Performance Review to HR for legal compliance review.
- e. HR will review the Performance Reviews, conduct a gap analysis to ensure that all employees have been accounted for and confirm the fairness and validity of the distribution of performance ratings. HR may request supporting information for reviews that fall below average. HR will return the reviewed forms to the employee's Supervisor, Department Head or Elected Official.
- f. The employee's Supervisor will meet with them to discuss the Performance Review. The intent of the discussion is to ensure that the employee's Supervisor provides feedback regarding employee performance, at least once each year. Items to be discussed include, but are not limited to:
  1. Results of the Performance Review just completed;
  2. Level of performance expected and goals for the new reporting period; and
  3. Career counseling relative to such topics as advancement, specialization or training appropriate for the employee's current position.
- g. During this process, the employee may add any additional comments to the Performance Review. The employee and the Supervisor will sign the Performance Review. An employee's signature on his or her Performance Review only acknowledges that it has been reviewed with the employee. It does not indicate agreement or disagreement with the review. A copy of the Performance Review is to be provided to the employee for his or her records and the original should be sent to HR for filing.
- h. All employees whose Performance Review overall average is two (2) or below will be put on a Performance Improvement Plan within two (2) weeks of completing the Performance Review cycle.

**4. Amendments:** The Bastrop County Commissioners Court may amend or withdraw this policy at any time.









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Consider including customer testimonials or information about awards you've won.





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INSERT LOGO OR COMPANY  
NAME HERE

**Phone:** 555.555.5555  
**Fax:** 555.555.5555

555 Street Address  
City, State 55555

[www.webaddress.com](http://www.webaddress.com)

Shipping Address Here  
555 Street Address  
City, State 55555



STATE OF TEXAS  
COUNTY OF BASTROP



*This Certificate is Awarded*

*To*

*[Employee Name]*

*of*

*[Department]*

**In Recognition of**

**5 Years of Service**

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County Judge

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Commissioner, Precinct 1

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Commissioner, Precinct 2

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Commissioner, Precinct 3

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Commissioner, Precinct 4



## BASTROP COUNTY, TEXAS Job Description

**Job Title:** *[Position Title]*

**Department:** *[Department Name]*

**FSLA Status:** Non-Exempt

**Reports To:** *[Insert Department Head's &/or other Supervisor's position title here.]*

**SUMMARY:** This position performs ... *[Insert primary purpose/function of the position here.]*  
Work involves ... *[Insert overall job duty summary here. Approximately 3-4 sentences.]*

### **SUPERVISION RECEIVED AND EXERCISED:**

Receives supervision from *[Insert Department Head's &/or other Supervisor's position title here.]*

Exercises no supervision. *[If position DOES exercise supervision, change to state which positions supervision is exercised over.]*

### **ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following:

1. *[Department Head/Supervisor to insert specific job duty descriptions here using bullets. Preferably in order of importance &/or majority of time spent overall performing the duty.]*
2. *[Department Head/Supervisor to insert specific job duty descriptions here using bullets. Preferably in order of importance &/or majority of time spent overall performing the duty.]*
3. *[Department Head/Supervisor to insert specific job duty descriptions here using bullets. Preferably in order of importance &/or majority of time spent overall performing the duty.]*
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8. *[Department Head/Supervisor to insert specific job duty descriptions here using bullets. Preferably in order of importance &/or majority of time spent overall performing the duty.]*
9. *[Department Head/Supervisor to insert specific job duty descriptions here using bullets. Preferably in order of importance &/or majority of time spent overall performing the duty.]*



10. Provides exceptional customer service to County employees and the public;
11. Works as part of a team and maintains a cooperative, helpful attitude towards fellow workers, supervisors, and the general public;
12. Maintains confidentiality and security of all *[Insert department name here]* information and systems;
13. Performs related work or duties as assigned by supervisor.

**OTHER FUNCTIONS:** Performs other job related duties as directed by supervisor(s). **Regular attendance is considered an Essential Function of this job.** **NOTE:** The essential functions describe the general nature and level of work being performed by employees holding this position. This is not intended to be a comprehensive listing of all duties and responsibilities required, nor are all duties listed necessarily performed by any one employee so classified.

**MINIMUM QUALIFICATIONS:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Knowledge of:**

*[Department Head/Supervisor to insert primary knowledge needed to perform job. (Usually 2-3 primary areas of knowledge should be listed.) Ex: "General principles and practices of Payroll and Employee Benefits management;"]*;

Advanced principles and practices of ... *[Insert departmental specifics here]*;

Personal Computer skills and software, including Microsoft Office;

Professional Customer Service skills;

Proper English usage, spelling, grammar and punctuation;

Standard office policies, procedures, and equipment;

Bastrop County policies and procedures.

**Ability to:**

*[Department Head/Supervisor to insert primary abilities needed to perform job. (Usually 1-2 primary abilities should be listed that are job specific.)*

Perform multiple tasks simultaneously in a timely manner;

Record, and disseminate accurate information from telephone conversations and personal contact;

Communicate clearly and concisely, both verbally and in writing;

Understand and follow verbal and written instructions;

Complete routine business correspondence;

Effectively speak to small audiences to convey information;

Properly interpret, understand and make decisions in accordance with laws, regulations and policies;

Conduct business with the public in a professional, courteous manner;

Function independently, exercise good judgment, manage multiple projects, and meet deadlines;

Establish and maintain effective working relationships with those contacted in the course of the job;

Demonstrate personal communication skills including effective telephone skills and public speaking;

Operate equipment required to perform essential job functions;

Work independently in the absence of supervision;

Work in a safety-conscious environment and to follow and promote good safety practices;

Handle exposure to potentially hostile individuals;

Maintain confidentiality of information encountered in work activities at all times.



### **Physical Demands:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential duties of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Maintain effective audio-visual discrimination and perception needed for:

Making observations, reading and writing, operating assigned equipment, and communicating with others;

Employee must have visual abilities including close vision, distance vision, depth perception, peripheral vision, and the ability to adjust focus.

Maintain physical condition needed to accomplish the performance of assigned duties and responsibilities, which may include:

Walking, sitting, or standing for long periods of time; Lifting and carrying materials weighing up to **25 pounds** *[Insert correct amount if needed]* such as files or stacks of records; Occasional climbing, stooping, crawling, squatting, &/or kneeling.

Maintain mental capacity sufficient to accomplish the performance of assigned duties and Responsibilities, which may include:

Handling stressful situations;

Interpreting federal laws and regulations;

Effective interaction and communication with others;

Prepare clear and concise reports;

Making sound decisions in a manner consistent with the essential job functions.

### **EXPERIENCE, EDUCATION, and LICENSING:**

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

#### **Experience:**

*[Insert # of years of experience & field/category of experience required];*

*[Insert preferred experience is applicable.]*

#### **Education:**

*[Insert level of education required;]*

High School diploma or equivalent.

#### **Licensing:**

*[Insert required licensing if applicable.]*

### **SELECTION GUIDELINES:**

Formal application; rating of education and experience; oral interview; reference and other background checks; job-related tests may be required.

**\*\*\* This position is subject to random and/or reasonable suspicion and/or post-accident testing for drugs and alcohol.**

*This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change. The employee further understands, and accepts, that this position falls under the provision of an "At Will" employment, and under no circumstances is a contract for employment.*


 <3 mo. Review

 9 mo. Review

 6 mo. Review

 Annual Review

## PERFORMANCE REVIEW

Employee Name		Job Title	
Department		Supervisor	
Start Date with County	Start Date in Current Position	Review Period Start	Review Period End

**Rate the employee on the competencies listed below**

5	Exceptional	Consistently, over time, performs all duties in an exceptional manner; significantly exceeds expectations with exceptional quality, quantity and timeliness of work; significantly exceeds all objectives, consistently achieves exceptional results well beyond those expected of the position.
4	Exceeds	Consistently exceeds the normal expectations for the position; exceeds expected criteria for quality, quantity and timeliness of work; consistently exceeds goals and objectives; achieves results beyond those expected for the position.
3	Meets	Consistently performs all duties of the position in a fully capable manner; meets all expected criteria for quality, quantity and timeliness of work, including meeting goals and objectives.
2	Needs Improvement	Performs many duties in a capable manner; meets some goals and objectives, but requires improvement in quality, quantity and timeliness of work to achieve overall satisfactory performance; may require more supervision than expected for assignment. Could be the performance level of those new to a position.
1	Unsatisfactory	Unacceptable performance suggesting lack of willingness and/or ability to perform the requirements of the position. Separation or reassignment is indicated unless performance improves significantly. Requires excessive supervision.

Competency	Description	Comments	Employee Rating	Manager Rating
Attendance & Punctuality	Schedules time off in advance. Begins work on time. Follows Bastrop County attendance policies. Ensures work responsibilities are covered when absent.			
Communication	Communications are clear, effective, and appropriate for the audience. Actively listens to others and responds to insure two way communications. Shares business knowledge and information with manager, other colleagues, and customers as needed for the job.			
Cooperation & Teamwork	Establishes and maintains effective relationships. Exhibits tact and consideration. Willingness to help others. Balances team and individual responsibilities. Gives and welcomes feedback. Contributes to building a positive work environment.			
Initiative	Asks for help when needed. Originates or develops ideas or gets things started. Shows willingness to tackle new challenges. Ability to plan work and to go ahead with a task without being told every detail.			
Job Knowledge	The degree to which the employee has acquired the necessary knowledge of products, policies and procedures; OR knowledge of techniques, technology, skills, equipment, procedures, and materials required on the job.			

Professionalism	Treats people with courtesy and respect. Works with integrity and ethically. Conducts professional relationship with agencies, officials, supervisors and coworkers. Follows policies about data protection and confidentiality regarding any information obtained as part of daily activities.			
Quality & Productivity	Work is clear, well organized, accurate, performed as directed, and conforms to Bastrop County policies. The extent to which an employee produces work in a timely manner.			
		<b>Competency Average</b>		

**Accomplishments:**

1.
2.
3.
4.
5.
6.

**Areas for Improvement:**

1.
2.
3.

**Action Plan (Goals), i.e, certifications, education, skills, work assignments, etc.:**

1.
2.
3.
4.

**Comments:**

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<b>Employee Signature</b>	<b>Date</b>	<b>Supervisor Signature</b>	<b>Date</b>
<b>Department Head/Elected Official Signature</b>	<b>Date</b>	<b>Human Resources Signature</b>	<b>Date</b>

Employee signature acknowledges receipt of review and does not necessarily indicate agreement