ATTACHMENT IV

(People Admin - Evaluation Tracking Overview)

SelectSuite™
Adding Performance Management

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Executive Summary

From our previous meetings and discussions, we have determined that the PeopleAdmin Performance Management system is a great fit for your institution. We will facilitate a more efficient and effective performance review process.

The costs are reasonable, and the implementation is fairly rapid – and you will have the ability following launch to create additional review "Programs" on your own (or with assistance), suitable for different role types, or different review purposes – matching a need for faculty; for full time or part time; for performance improvement (intervention); or for "probation".

Upcoming "Onboarding" features within the PeopleAdmin system are definitely of interest, but we do not yet have a complete definition of the features or the pricing. Similarly, some form of electronic personnel file is of interest, but PeopleAdmin does not at this time have a solution, and "Records" from NetChemia may not be the best solution…

This proposal recommends you move forward with the Performance Management piece – it is a superb fit for you, providing a tool that is easy to learn and use – and matches well with some of the stated objectives of the district!

Increased Benefits by adding the
Talent Pack / Performance Management

Hiring top talent is critical – but retaining and developing that talent is even more important to the institution's long-term success. Even motivated, dedicated employees need clear goals and candid feedback to engage, thrive and contribute meaningfully to the mission.

Talent Pack capabilities include:

Flexibility: Performance management programs to fit your institution's unique requirements and practices.
- Flexible eligibility management: HR controls which employees are included in each program
- Concurrent program eligibility – enter new employees in annual or focal review programs while they are in the new-hire probationary program
- System-scored, unscored or manually scored evaluations
- Ratings your way – whole numbers, decimals, or banded scoring

Continuity and relevance: Performance evaluations deliver real value when they build on goals set in prior cycles and inform employees' day-to-day activities.
- Private progress notes capture relevant information through the year for use at review time
- Objectives from the previous evaluation keep each employee on a growth trajectory
- Document attachments provide additional information and context
- Scheduled check-in meetings keep employees on track toward their goals throughout the year
- HR annotations provide guidance to supervisors as needed

Task management: No task is forgotten. Every supervisor and employee knows what to do and when to do it.
- Program task scheduling and sequencing by due date or by prerequisite tasks
- Task reminders and completion tracking
- Form acknowledgements and approvals

Visibility: Quick access to the information you need, whether you're managing the program, evaluating your employees, or just keeping your work aligned with your performance goals.
- Employee portal gives all employees easy, private, anytime access to their evaluation feedback and personal progress notes
- Personalized dashboards offer appropriate progress visibility to HR, supervisors, and employees
- Review history shows who made each change, what the change was, and when it was made
- Printer-friendly views accommodate processes that require paper copies

SelectSuite Delivers Proven, Measurable Results
PeopleAdmin partnered with an independent third party Hobson & Co to research and validate customer value.

The added capabilities of the optional Talent Pack boost efficiency by streamlining these activities:
- Reduce supervisor time completing evaluation process by 60%
- Reduce HR staff time tracking and managing evaluation process by 75%
- Reduce HR Staff time tracking and managing onboarding activities by 20%
- Increase employee productivity by 0.5%

Implementation

The power of experience

We've deployed over one thousand higher education solutions, which gives our customers a unique advantage – expertise. We leverage the best practices and know-how gained from working with higher education institutions like yours. Our team is able to design your implementation after a brief discovery process, which empowers you to focus on the day-to-day work of running your department. All implementations include online training to ensure your path to success is as fast and easy as possible.

Smart, simple, and innovative.

We understand your project timing:
System can be ACTIVATED within a week of a finalized agreement, and the implementation project will proceed with adjustments and modifications to your initial Performance Program taking place over approximately a 4-week period.

	Deliver			Close
	Week 1	**Week 2**	**Week 3**	**Week 4**
Deliver Phase				
Project Kickoff	■			
Attend Hands-On Training Sessions	■	■	■	
Data Load Discussions	■			
Process Discussions	■	■		
Process Configuration		■	■	
Final Change Requests Due			▨	
Final Data Loads Due			▨	
Weekly Consulting Meetings	■	■		
Close Phase				
Final Consulting Meeting and Site Review				▩
Complete All Hands-On Training				▩
Solution Live in Production				▩
Transition to Support				▩

▨ Indicates Major Customer Deliverable

HANDS-ON TRAINING CLASSES & MEETINGS:
- 5 classes, delivered by PeopleAdmin via web-delivered meetings – for up to 3 users, selected by Client. This training must be utilized during the delivery period.
- Receive weekly consultation meetings during the delivery period where PeopleAdmin will answer questions, demonstrate functionality, and help solution business needs using the System.

PERFORMANCE MANAGEMENT CONFIGURATION DETAILS:
- Process Definition to include the employee, supervisor, and second-level supervisor.
- Performance Plan Form including Program Level Objectives, Individual Objectives, Goals and Instruction Text.
- Self-Evaluation Form including Program Level Objectives, Individual Objectives, Goals and Instruction Text.
- Supervisor Evaluation Form including Program Level Objectives, Individual Objectives, Goals and Instruction Text.
- PeopleAdmin will support the customer in building of additional process definitions and forms through training the customer for self-service.