ENCOMPASSING VISIONS

Job Evaluation and Talent Management Software

Basic Steps to System Implementation

- Full System Functionality

Version 2024

A Note about Configuring your Encompassing Visions software system:

Configuring the Encompassing Visions application according to the steps in this guide will enable you to utilize the full functionality of the software and reflect **precisely** what is important to your organization in terms of job evaluation and the employee learning and growth process, priorities, and measures.

This document is intended to be both a checklist and a guide. Please work with your consultant or ENCV Client Relations staff for additional ideas and information beyond what is provided within this document. And remember – no matter what configuration changes you make in the software, its architecture is designed to ensure nothing will be lost with future software upgrades.

Our goal is to ensure you can use Encompassing Visions to its full potential, so the talent potential of your organization is realized.

Let’s get started!

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Introduction

Encompassing Visions efficiently collects detailed, high quality Job Data that defines and reflects the organizations core competencies and integrates the Job Data with Employee Competency Assessment Data to inform a number of technology-enabled HR processes.

Setting Up ENCV For Job Evaluation

Technical Requirements

1) Prepare the Hardware/Server Environment

See System Requirements here, or on page 75 of this document.

2) Install the Encompassing Visions™ software system

Our IT staff will work with your staff to securely transfer the program and database files for installation on a) your own server or b) set up the on the cloud server managed by Microsoft Azure.

System Administration

3) Logging In

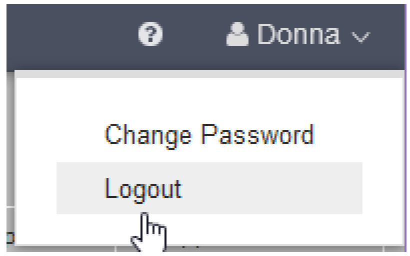
To log in to Encompassing Visions, key the URL into your browser.

Note: Administration module functions are accessible with all browsers.

- Add this website to your favorites or put the icon on your desktop for future use.
- Enter your user ID and password. Default settings with installation are Admin1/Admin1, Admin2/Admin2, and Admin3/Admin3
- If you have forgotten your User ID and /or Password but have a valid email address connected in **ENCV** to your name and User ID, the system will email a new Password to you that will enable system access.
    - **Note:** If you will be using **ENCV** for Learning and Growth Reviews, this functionality will be significant and a time savings to you. Management and staff will be able to gain secure system access without having to involve the System Administrator in re-setting that information for them.

4) Changing the Password

To change your password, hover over your name, in the right-hand side of the navigation bar, and open up the sub-menu. Click on Change Password.



The system will bring up a window allowing you to set up your new password. You will need to re-enter the password and then click “ok”. **Note**: When one or several new/unique Admin User IDs and Passwords have been established, we suggest you delete the system defaults for security reasons.

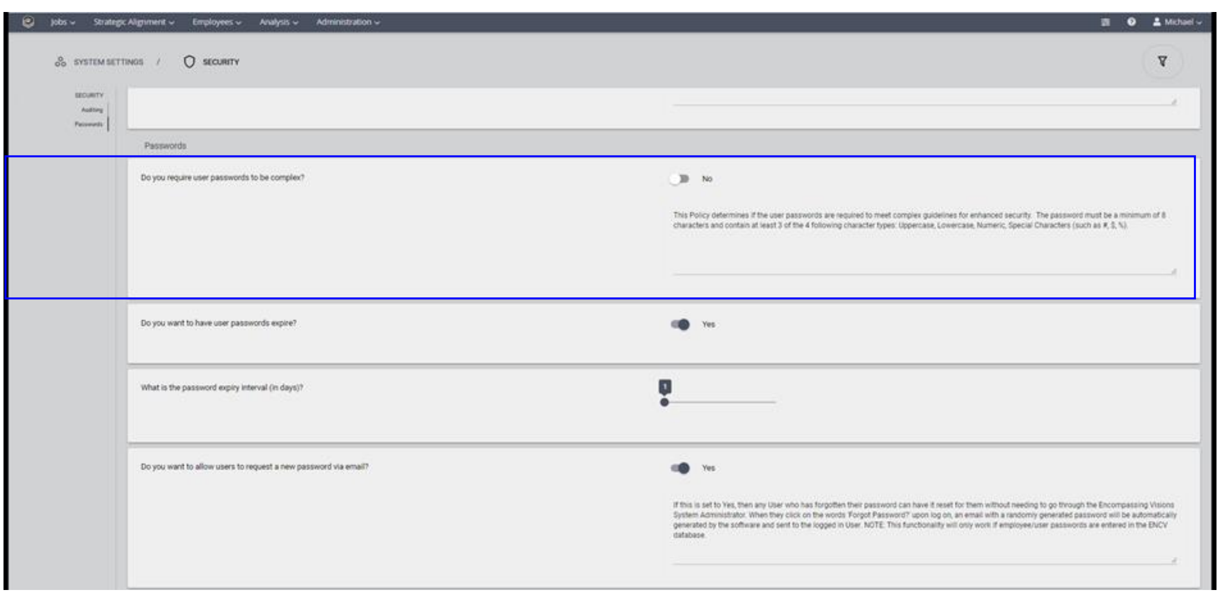
Password Policy

Temporary Password

When the system administrator assigns a password for a new Employee, or changes the Employee's password, the system requires that the Employee change the password upon first log on. A temporary password assigned by the system administrator must be a minimum of 6 characters (alpha, numeric, symbols) and may be reused.

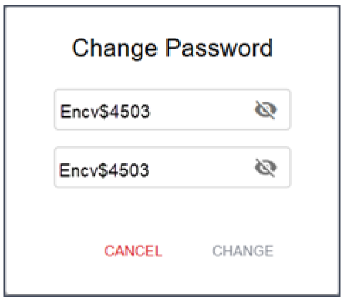
Complex Password

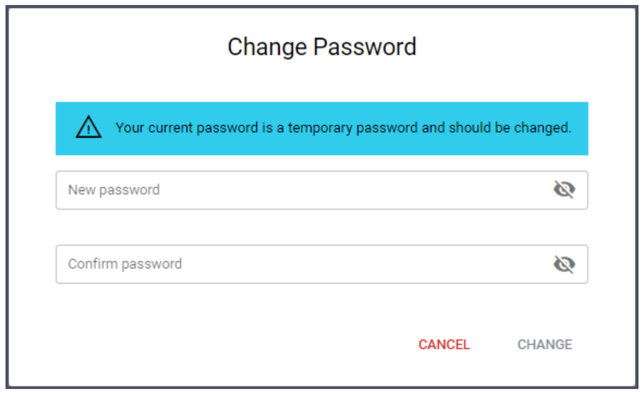
Some organizational procedures require complex passwords for access to software applications. If that is a requirement for your organization, then go to **Administration>System Settings>Security>Passwords**>**Do you require passwords to be complex? Set to ‘Yes’**. This will force a user to set a complex password when they log in the system. If the policy is set to no, the temporary password requirements (above) are enabled.



Complex Password requirements:

- Must be a minimum of 8 characters, and,
- Must contain at least 3 of the following 4-character types:
    - o Uppercase character
    - o Lowercase character
    - o Numeric character
    - o Special character (*such as #, $, %)*





5) Adding a new User

Administration>Users >Click on the Add icon. A **User Details** screen opens.

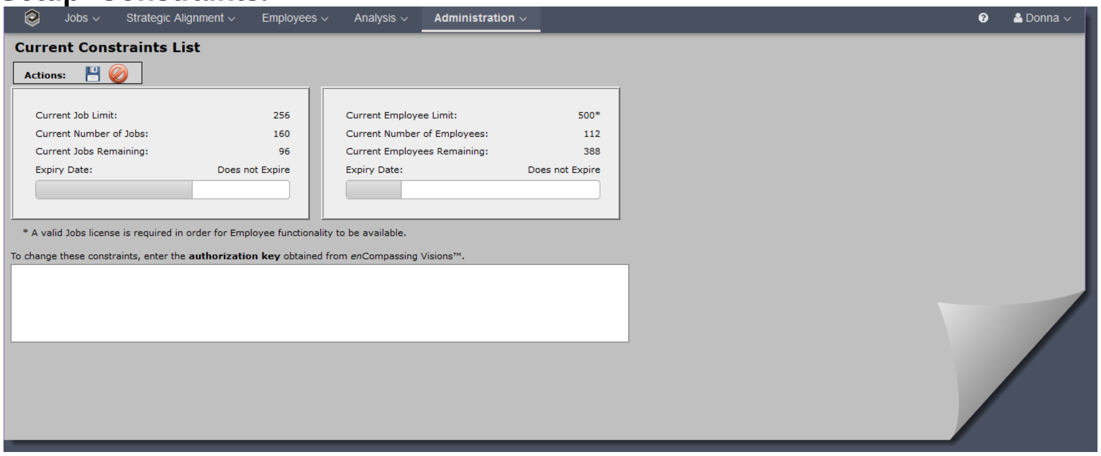
Complete the appropriate information, keeping in mind that your user ID is a primary key for the employee record and cannot be altered later.

- **Note**: the password will be changed upon first log in by the user, so a generic password can be entered here. Just remember what it is to tell them! Also, if your organization is large and users are frequently needing to be added/deleted from the ENCV database, contact ENCV to ask about our Data Integration module for automatically updating your ENCV database from your organizations HRIS or Payroll system.

6) Install the purchased 'System Authorization Key'

To enter Job (or Employee) data into the software, a security code will be emailed to you by your ENCV Client Relations contact. It will need to be copied and pasted into the

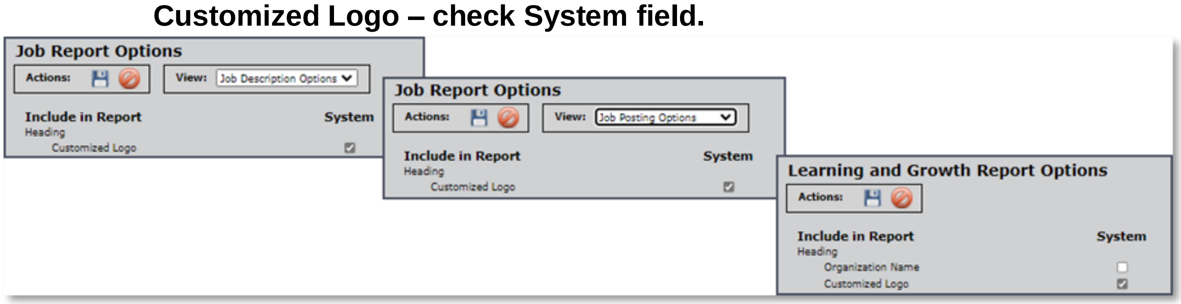
‘Constraints’ field within the installed software system. **Administration>System Setup>Constraints**.



7) Install the Organization’s Logo / Organizational Branding w/Colour

To add your organization’s logo to the reports:

- To upload the logo, go to **Administration>System Settings>Reports>Logo**. The logo maximum size is 2.5cm (1 in) tall by 10cm (4 in) wide.
  Note: Remove any excess padding and follow the directions of the generated warning and adjust as required.
- Choose which type(s) of reports the logo should appear on:
  - To include logo in Administrative reports: go to **Administration > System Settings > Organization Branding > Logo > Use Logo on Reports? Set to 'Yes'**
  - To include logo in Job reports: go to **Job > Job Settings > Organization Branding> Logo > Use Logo on Reports? Set to 'Yes'**
  - To include logo on Jobs Description reports: Go to **Job > Job Settings > Reports > Report Options > Customize > Job Description Report Options > Customized Logo – check System field**
  - To include logo on Jobs Posting reports: Go to **Job > Job Settings > Reports > Report Options > Customize > Job Posting Report Options > Customized Logo – check System field**
  - To include logo in Learning and Growth reports: go to **Employee > Employee Settings > Organization Branding > Logo > Use Logo on Reports? Set to 'Yes'**
  - To include logo on Learning and Growth reports: Go to **Employee > Employee Settings > Reports > Report Options > Customize > Customized Logo – check System field.**



- To introduce the organizations primary, secondary and tertiary branding colors into reports; go to **Administration > System Settings > Reports > Colors** and make a color selection from the palette options provided.

8) Determine the Job Evaluation Team (JET) Membership

Based on 30 years of experience, we have found that utilizing a Job Evaluation Team to analyze and evaluate the jobs within the organization is the most accurate, efficient, and effective way to produce quality results. The process involves selecting people from various departments across the organization who will dedicate time to the job evaluation process. The JET members should be individuals who are well-respected within the organization and have good communication skills. They should be objective and analytical by nature, and be knowledgeable of the organization's structure, positions and departments. Often JET members are people who have held various positions within the organization. The JET implementation method is described in detail here.

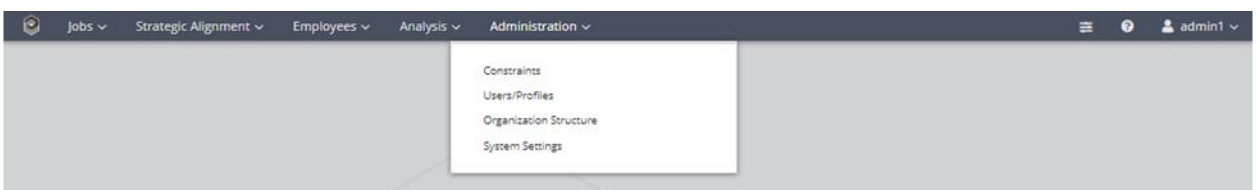
9) Identify the Encompassing Visions™ System Administrator(s)

The other critical staff assignment is the person(s) who will act as the ENCV System Administrator. This person will become the ENCV resident expert. They will typically handle the configurations listed in this document, participate in the job evaluation process, add and update users, and run reports. If employee learning and growth modules are enabled, they will also train staff on how to complete work plans and competency reviews, and act as the primary contact with ENCV Client Relations staff.

10) Review System Policies

You can review system policies by going to the **Administration Module >System Settings** or to each relevant policy controls linked to the related modules.

Note: If only rolling out the 'Job Evaluation' functionality of Encompassing Visions, then just review the options that appear under **Jobs > Job Settings**.



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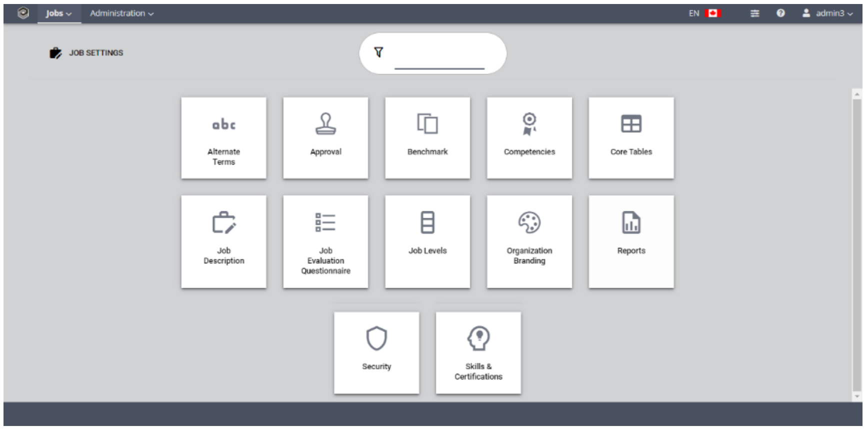
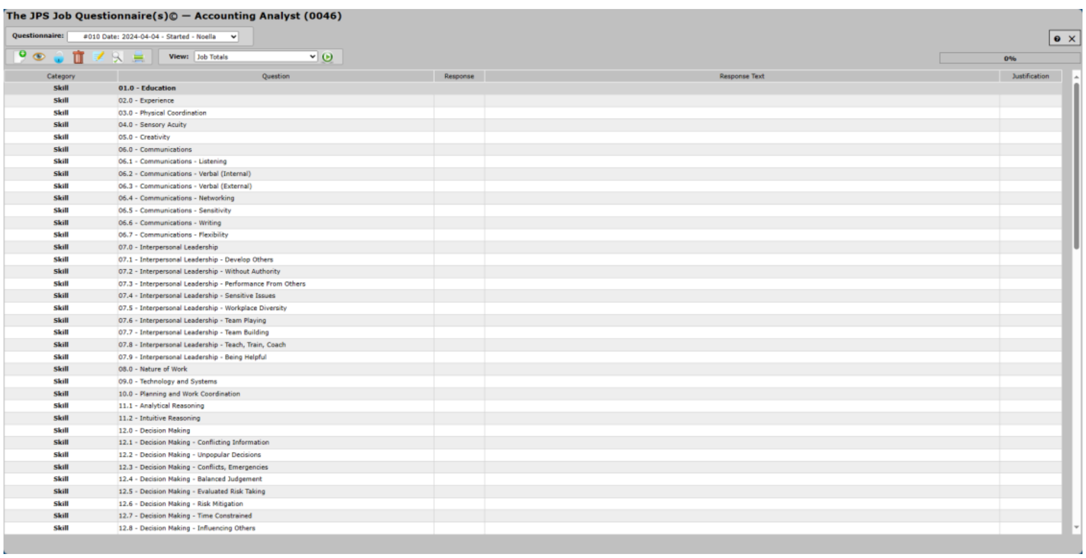


11) Review the JPS Job Questionnaire©

The JPS Job Questionnaire© is an internationally copyrighted document that asks a series of questions about what a job does. It has been developed over 30 years with the experience gained through the evaluation of tens of thousands of jobs to date. Responses are tabulated to calculate a numerical score that reflects the jobs relative 'value' to other jobs within the organization (for **compensation purposes**). Based on the same information, the questionnaire responses are translated into importance ratings for various behavioral competencies (for **Job Posting** and **Candidate Interview Reports**, *as well as for employee learning and growth review purposes*).



The Encompassing Visions Job Evaluation Process allows your organization to***:***

- Gather all the relevant information required to evaluate every job in your organization.
- Keep detailed documentation on every contentious job evaluation decision made.
- Score jobs for compensation purposes based on the relative Skill, Effort, Responsibility and Working Conditions they provide to the organization.
- Compare and analyze jobs to ensure job evaluation results make sense, are fair, appropriately reflect job similarities/differences, with results that can be easily communicated/understood.

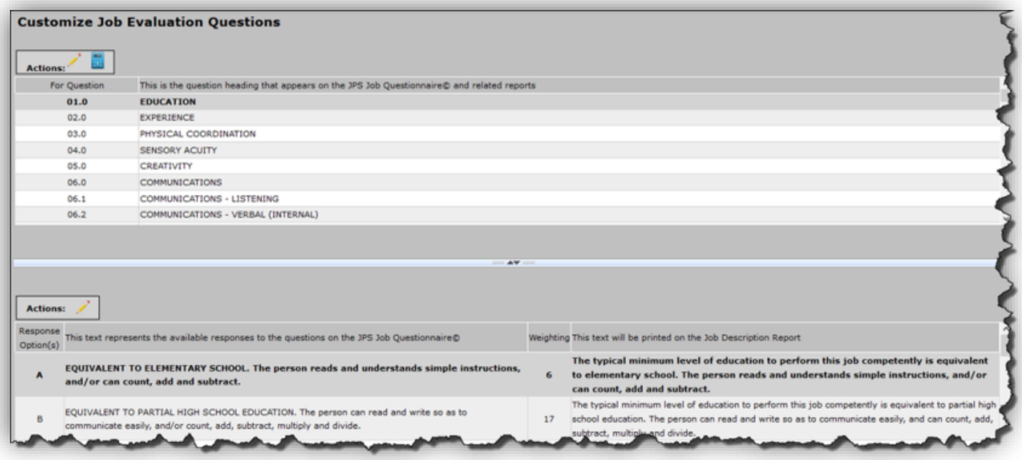
- Generate Job Descriptions, Job Postings, and a list of Candidate Interview Questions.

Customization should not be necessary. However, sometimes it is appropriate for some text to be re-worded to more closely reflect the terminology used within your organization.

To do this, distribute a hardcopy of the standard JPS Job Questionnaire (available from ENCV Client Relations in MSWord format) to JET members. Ask them to review the documents for terminology, context and understanding with respect to the business culture of the organization. If changes are required, it is strongly suggested for consistency and accuracy reasons that changes first be noted on this hard copy document, discussed, agreed to and then entered into the database by the ENCV administrator.

Note: It is **critically important** that any suggested changes **first** be discussed with your consultant or ENCV Client Relations staff **before** being entered into the software. They are best able to tell you what impact the suggested change(s) will potentially have on other measures/functionalities within Encompassing Visions.

- The JPS Job Questionnaire© questions, Elaboration fields, Response Text, Response Weightings, Response Examples and Job Description Text are located in **Jobs > Job Settings > Job Evaluation Questionnaire > Job Evaluation Questions> Customize**



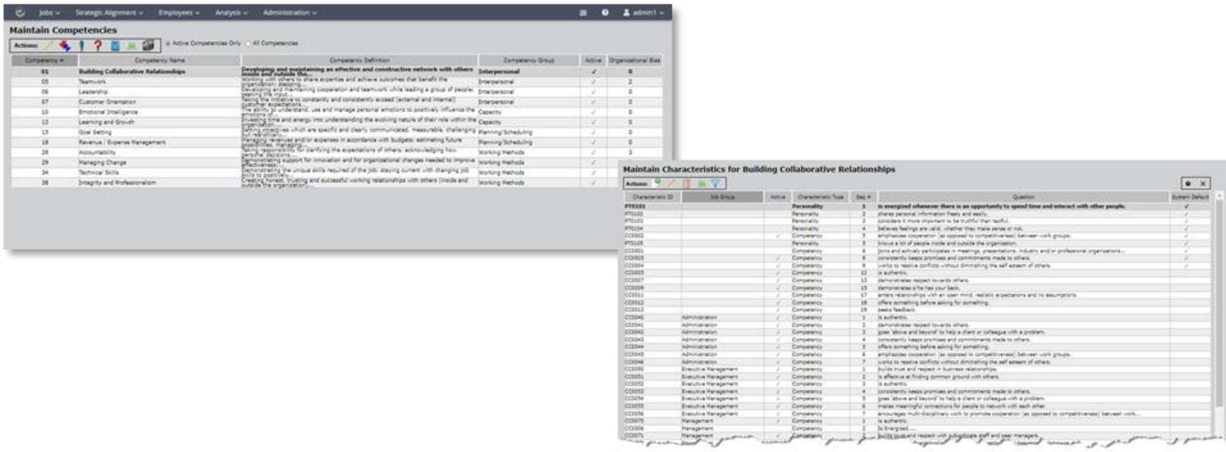
12) Review the Competency and Technical Skill Libraries

Review and update Name, Definition, Details, Excellence and Interview Questions

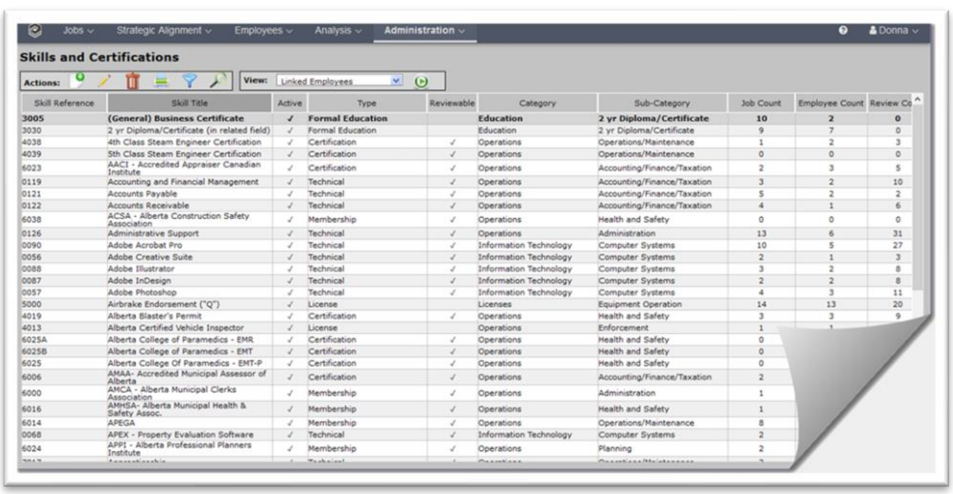
- Specific Competency information is stored in **Job > Job Settings > Competencies.** Select a competency. Various details are accessible by using the pick list.
  - Double click on any listed competency to edit the name and definition of the competency, to make it "Active/Inactive". It's VERY important that any changes do not affect the meaning of the competency.
  - Competency Characteristics are the list of detailed questions that are asked in employee learning and growth reviews if the competency is particularly important in the job the employee is assigned. These questions are system defaults that can be made "Inactive", and new / additional / other questions can be entered (for 'All' or 'Job Group' specific) to ensure job-specific, complete, and appropriate measures of what your organization expects in the learning and growth of the related competency.
  - The Describing Excellence feature is a description of what excellence looks like in the Learning and Growth of the competency. This section is printed in the Employee Learning and Growth Report (by default) if competency review feedback suggests there is need for development. These elements can be configured to reflect what excellence would look like in your organization, and they too can be customized for each Job Group.
  - Selection Interview questions have been pre-populated for each competency. This feature is also configurable to create a Selection Interview Guide that

reflects the questions job interviewers should ask in your organization. This feature can also be fine-tuned for each Job Group.

- Establish global policy values for Competencies (i.e., an “Organization Bias”) as required.



- Specific Technical Skills information is stored in **Job > Job Settings > Skills/Certification**
- **Actions:** select the icon for **“Insert a new skill”**
- To add additional skill types: **Job > Job Settings > Core Tables > select Skill Type**, Actions button: **Add New**



- Re-mapping competencies and The JPS Job Questionnaire©
  Note: Your organization may have already defined the behavioral competencies important to its operations. If so, and if they are different than the ones provided in the Encompassing Visions competency library, the software is designed to accommodate the remapping of the Job Questionnaire to meet your organization-specific competency needs. If this requires amalgamation of listed competencies, adding new competencies, and/or making some of the listed competencies inactive, please discuss this with your consultant or ENCV Client Relations staff. We will work with you to accomplish the customization of competencies to suit your organization.

13)Identify relevant 'Job Families'

A 'Job Family' is a group of jobs that share related expertise (e.g., Law, Accounting, HR, Engineering, Health/Safety, Sales, etc.)

To configure Job Families in Encompassing Visions™:

- See alternate terms configuration – if you want to change **"Job Family"** to a term more closely aligned with your internal terminology.
- **Jobs > Job Settings > Alternate Terms > *what term do you use for the Visions term: Job Family?***
- Add to and/or update **"Job Families"** listed in the table**. (Job > Job Settings > Core Tables > Job Family)**
- **Jobs Module > Jobs >** choose **Job Family** from pick list when a new job is created, or a current job is edited.

14)Identify relevant 'Job Groups'

A 'Job Group' are jobs that share a similar level of organizational responsibility (e.g., Executive Leadership, Management, Team Leaders, Union affiliation, Administration, Technical Professionals, Administration, Operations, etc.,)

To configure Job Groups in Encompassing Visions™:

- See Alternate Terms configuration – if you want to change **"Job Group"** to a term more closely aligned with your internal terminology.
  Jobs > Job Settings > Alternate Terms > *what term do you use for the Visions term: Job Group?*
- Add to and/or update **"Job Groups"** listed in the table**. (Job > Job Settings > Core Tables > Job Group)**
- **Jobs Module > Jobs >** choose **Job Group** from pick list when a new job is created, or a current job is edited.

NOTE: We STRONGLY recommend you do not delete any listed (default) Job Groups listed in the 'Job Group' table provided. They likely have connections to other functionalities in ENCV you will later appreciate having access to.

15)Identify relevant 'Locations'

To configure the Location table in Encompassing Visions™:

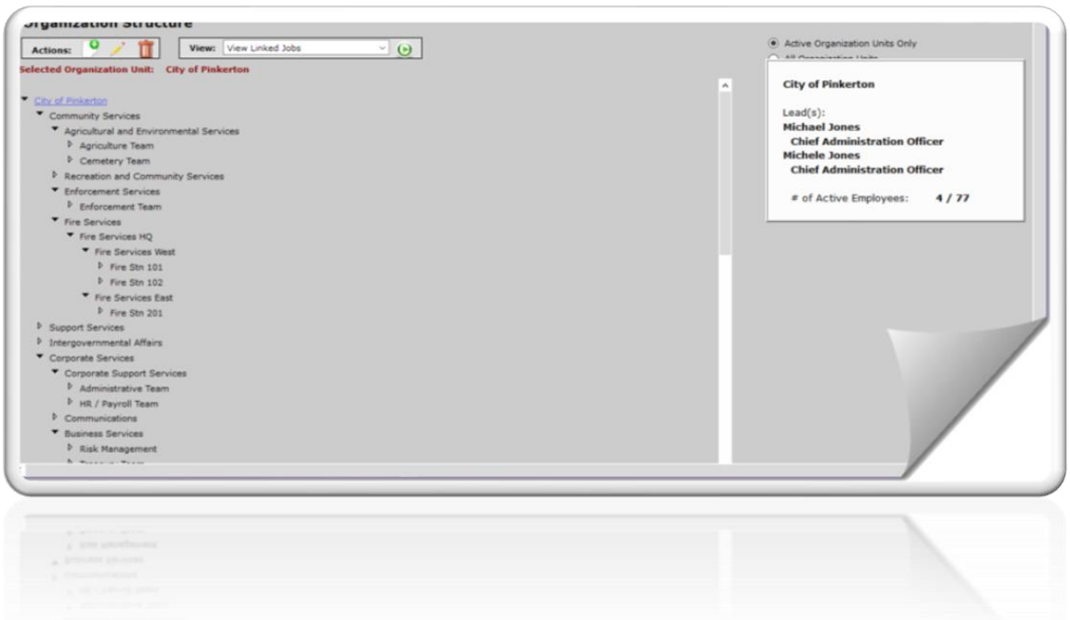
- **Job > Jobs Settings > Core Tables > Location > Actions: Add New or Edit**
- **Jobs Module > Jobs**, choose **Location** from the pick list when a new job is created, or a current job is edited – *but only* if it is appropriate / important to recognize that the Job is only found at this specific location.

16)Identify and build the Organization Structure into the software (Optional)

To configure the Organization Structure in Encompassing Visions™:

- **Administration > Organization Structure >View Actions button: Add New Organization Unit**
- *Note 1:* We recommend that the organization structure be built from the top down. Be sure to accurately reflect the organizational reporting layers as each unit is added to the 'organization chart' building inside Encompassing Visions, and make sure the first/top organizational level is the name of the organization.
- *Note 2:* The names of employees who are **"Leads"** within the organization should appear on this Organization Structure when:
  - 1) that part of the organization is highlighted, and

- 2) Employee names have been added into the database (# of active employees for that department will also display).
  - (See Step 35 – "***Load and link Employee Information with User Id's and User Profiles***".)
- *Note 3:* If your organization **does not** want to assign jobs to an organization structure and either **is not** using ENCV for employee learning and growth reviews OR uses Supervisor/Employee reporting codes to establish learning and growth review relationships, then building the organization structure in the software is not necessary.



17) Determine Job Reference Numbers

Each job needs to have an identifying number attached. If available, it is **very important** to use the numbers that are common elsewhere in your systems, such as the Job ID in an HRIS or Payroll system, particularly if the organization plans to utilize the Data Integration and Import services of the application to automate updates in ENCV and ensure synchronization with HRIS/Payroll updates.

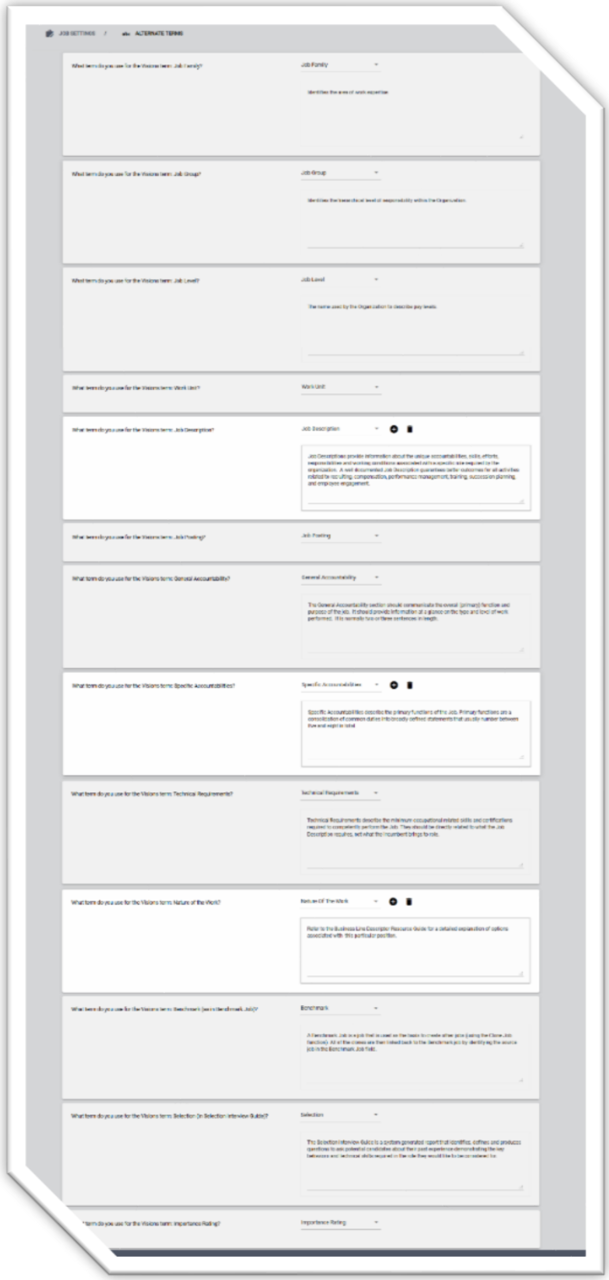
18) Configure the Job Description format

Alternate Terms: Terms that are already in use in your organization can replace the default terms in the application. For example, your organization might refer to our 'Job Description' as a **Job Profile**, and our term General Accountability as **Core Responsibility** or **Primary Purpose**.

To configure Job Description terms in Encompassing Visions™:

- **Jobs > Job Settings > Alternate Terms**.
- All Terms are listed that can be changed.
- Locate the default term in the list: "What term do you use for the Visions term: xxx."
- Select the default term you wish to re-name by selecting the drop-down menu or click the "**Add"** icon ⊕. This will bring up a window that you can **"Add New"** or choose from the pick list.

- Click **"Save"** to save the *Alternate name* for term or **"Cancel"** to close the window.
- This will change the term from the Encompassing Visions™ default term to your alternate term every place where it appears in the application, including on all reports.



Whole sections in the *Job Description layout* can be turned on or off to reflect the information your organization prefers to see in the description.

To configure the Job Description layout/sections in Encompassing Visions™:

- **Job > Job Settings > Reports > Report Options > Customize > View: Job Description Report Options** (drop down list).
- Check each element you wish to see on the job description reports.

- **System** means all users – Administrators and non-Administrators.

*****If disabling 'Support Statement for 6,7,12, and 13' please remove printed Job Description Report text related to these questions. "(With the following exceptions/as demonstrated by the following)" **Jobs > Job Settings > Job Evaluation Questionnaire > Job Evaluation Questions > Customize > 6.0,7.0,12.0 and 13.0.**

19) Configure the Job Posting format

Alternate Terms: Terms that are already in use in your organization can replace the default terms in the application. For example, your organization might refer to our 'Job Posting' as a **Work Posting**, and our term Technical Requirements as **Roles and Responsibilities** or **Qualifications**.

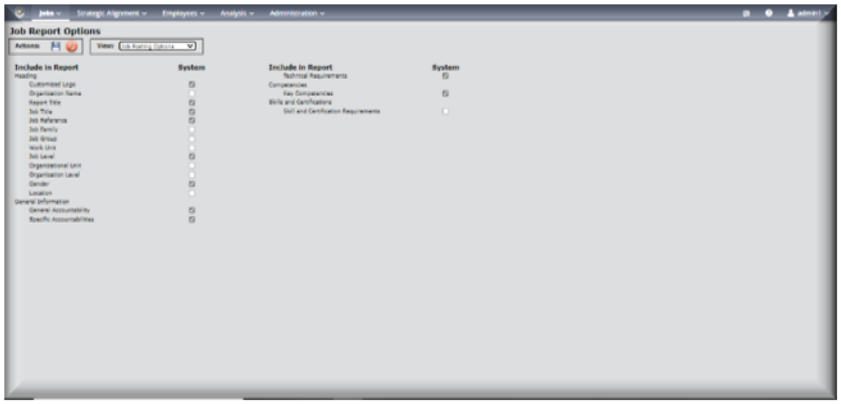
To configure Job Posting terms in Encompassing Visions™:

- **Jobs > Job Settings > Alternate Terms**.
- All Terms are listed that can be changed.
- Locate the default term in the list: "What term do you use for the Visions term: xxx."
- Select the default term you wish to re-name by selecting the drop-down menu or click the "**Add"** icon ⊕. This will bring up a window that you can **"Add New"** or choose from the pick list. Click **"Save"** to save the *Alternate name* for term or **"Cancel"** to close the window.
- This will change the term from the Encompassing Visions™ default term to your alternate term every place where it appears in the application, including on all reports.

Sections in the *Job Posting layout* can be turned on or off to reflect the information your organization prefers to see in the posting.

To configure the Job Posting layout/sections in Encompassing Visions™:

- **Job > Job Settings > Reports > Report Options > Customize > View: Job Posting Report Options** (drop down list).
- Check each element you wish to see on the job posting reports.
  - **System** means all users – Administrators and non-Administrators.



20) Establish a schedule for JET meetings.

Identify the Jobs to be reviewed and schedule appointments with Job Supervisors who will be able to provide informed opinions about the Jobs to be evaluated.

21) Conduct job evaluation system "TEST" with JET

- JET completes sample benchmark jobs from various areas of the organization, including those recognized as highly technical, administrative, and managerial in nature. The purpose is to build common understanding and consistency in how JET (as a team) will interpret the Questionnaire. Based on results of the sample study, adjust system-embedded wording and Elaborations as needed.
- The first questionnaires to be 'officially' completed in the organization will come from the interview with the most senior person in the organization. Make sure you have sufficient copies of the Questionnaire Response Sheet for the number of jobs to be reviewed in each session. Moving through the questionnaire ***one question at a time*** for the most senior job and (at the same time) for each direct report, the process will enable relative similarities and differences between executive roles to be effectively identified in the recorded questionnaire responses. Then with information now available for the senior management roles, work with each of these incumbents to complete job questionnaires for their direct reports in the same manner – ***question by question***. With this process, efficiencies, and accuracies in gathering quality information about what is similar and what is different between jobs that work together will be maximized. Facilitated by individuals on JET who can provide quality assurance checks and balances with the growing database of jobs from the organization, the relative appropriateness of responses within *and across* the organization can be assured. Updating system-embedded Job Questionnaire response 'Examples' and documenting important decisions in 'Justifications' will ensure accurate reference information will be always available in future job evaluation work, even as JET participants change over time.
- Each session using this format should enable JET to evaluate a minimum of 10-15 jobs per day.
- When several jobs are completely evaluated, various reports can be run to review where the positions fall, ensuring that no job is rated incorrectly on any question or any factor.
- Print and review the Questionnaire Cross Reference and (optionally) the Competency Cross Reference reports with the manager for relative scores /competency importance ratings with other jobs under their supervision.

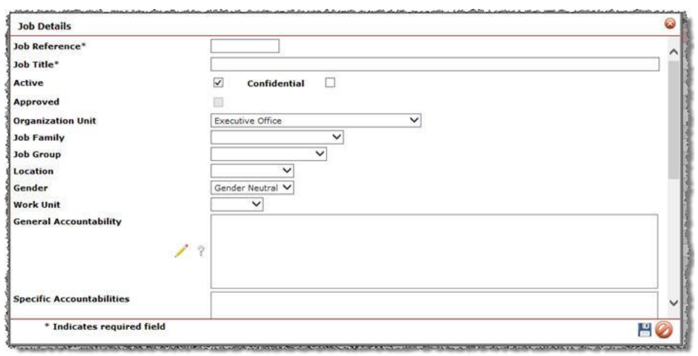
- **Job > Jobs > Generate Job Related Reports ( ) > Job Questionnaire Cross Reference Report/ Job Competency Cross Reference Report -** filter as required.

- **Note**: Upon completion of the JPS Job Questionnaire, when reviewing the Job Questionnaire Cross Reference Report, focus on 6.0, 7.0, 12.0, and 13.0. These questions are system calculated to reflect the average of the respective sub-questions. If there is a problem with overall responses to the related questions, it will first show up here. Then and only then you may want to review related question details.

22) Enter Questionnaire responses as they are completed

As Questionnaire Response Sheets continue to be completed, enter them into the software. Review existing job descriptions on file within the organization to determine their accuracy in reflecting what is currently being done. As appropriate, copy and paste this information (for General Accountability, Specific Accountability and Technical Requirements) from MSWord documents into the appropriate fields of Encompassing Visions™. Attach skills from the Technical Skills Library for each job entered. This will complete the process and ready Job Descriptions for printing.

- **Adding a Job**
  - Add job details to Encompassing Visions by **Jobs>Jobs>Add icon.**



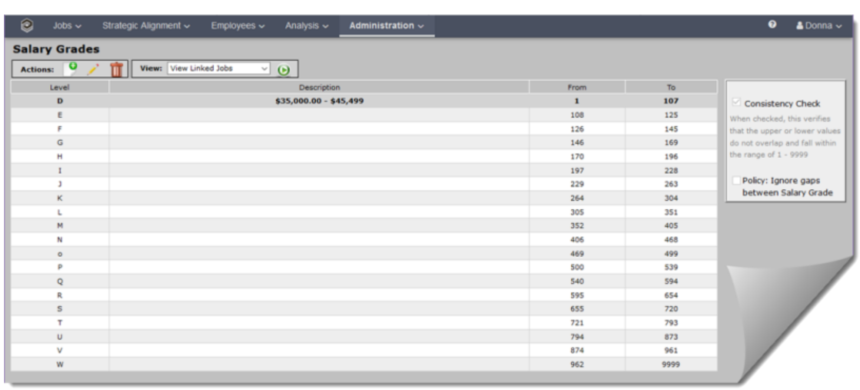
- Enter the following information and save:
  - *Job Reference* - We recommend that you match this job reference to any other job referencing process currently in place in your organization. ***Note*:** this is a primary key for the application and cannot be changed once it is saved.
  - *Job Title* – the HR or working title for the job.
  - *Active flag* – once the job is evaluated and ready to be included in all job-related reports, mark as ‘Active’.
  - *Confidential* – if this is a role that only certain people should view job details for (i.e., an Executive level management position), mark as ‘Confidential.’
  - *Benchmark* – ENCV enables organizations to create jobs that have a Benchmark and Clone relationship. If this policy is enabled (**Jobs>Job Settings>Benchmark>Enable Benchmark Job Processing?**) your organization will be able to flag one job as the ‘Benchmark’ job and link Clone jobs to it. While each Clone

may have a different title, skills, and accountabilities, ENCV enables the user to choose which text fields to include in the cloning, and it will share identical Job Questionnaire responses with the Benchmark. That means if you change any response in the Benchmark at some point in the future, that same change can then be automatically 'rippled' to every other job in the database that is related to the Benchmark.

- *Approved* – if your organization has set the policy to '*Approve*' jobs, marking a job as 'Approved' will record the date the job was approved. ***Note:*** if the Approval policy is enabled, jobs must be approved before they can be assigned to any employees. **Jobs>Job Settings>Approval>Use Client Job Approval Process?>Set to 'Yes'**
- *Organization Unit, Job Family, Job Group, Location and Gender* – these fields sort the job into its place within the organizational structure and enable future detailed report filtering.
- *General Accountabilities, Specific Accountabilities,* and *Technical Requirements* are open text fields where general and specific information about the job can be copied/pasted from another source or keyed into the space. We recommend that you consider customizing the names of these fields to best reflect your organization needs and understandings. These fields will print on **Job Postings** and **Job Descriptions** if checked in the job report options.

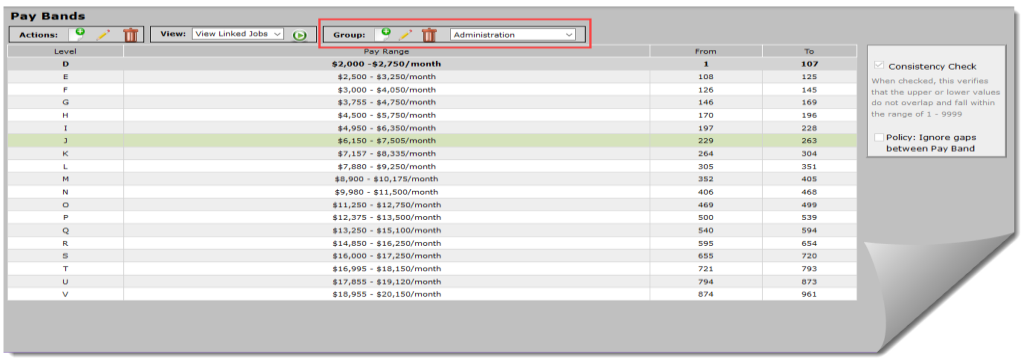
23) Establish Salary/Pay Grades (and Multiple Pay Lines)

- Begin the process of establishing point bands for salary ranges. We recommend they be in (approx.) 15%-point increments (minimum points to maximum points for each band). Fine tune the point bands as increasing numbers of jobs are added to the job evaluation database. The first draft of the point band ranges can be entered into the software once the most senior and most junior job in the organization have been evaluated. **Job > Job Settings > FLSA - Pay Bands/Salary Grades > FLSA – Pay Band > Customize.**
    - **Note:** The 'Description' field is available for (optionally) entering the salary range associated with the point band range. It is not currently included in any printed report but will be printable (by option) in future system-standard reports.



Level	Description	From	To
D	$35,000.00 - $45,499	1	107
E		108	125
F		126	145
G		146	169
H		170	196
I		197	228
J		229	263
K		264	304
L		305	351
M		352	405
N		406	468
o		469	499
P		500	539
Q		540	594
R		595	654
S		655	720
T		721	793
U		794	873
V		874	961
W		962	9999

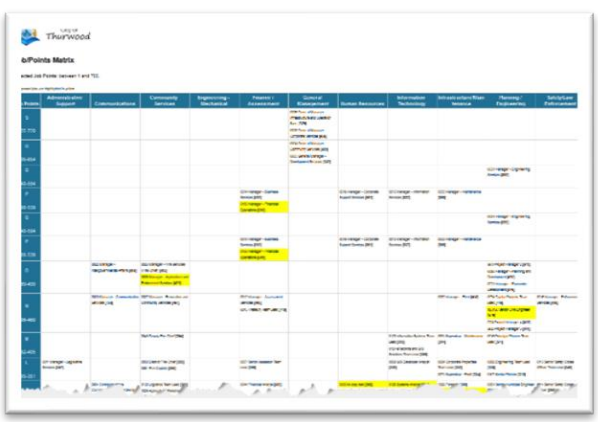
A. In the Job Levels table, several different and distinct point band tables/pay lines can be created to accommodate unique stakeholder demands and market realities. With one approach to job evaluation in ENCV, results get tracked into the point band table corresponding to the job being evaluated. This functionality will increase efficiency and understanding by having one common ‘measuring stick’ to evaluate all jobs across the organization.
   - Note: This multi-pay band / pay line feature is enabled by Policy. **Jobs>Job Settings>Job Levels>Enable Multiple Pay Bands>Set to “YES.”**



Level	Pay Range	From	To
D	$2,000 -$2,750/month	1	107
E	$2,500 - $3,250/month	108	125
F	$3,000 - $4,050/month	126	145
G	$3,755 - $4,750/month	146	169
H	$4,500 - $5,750/month	170	196
I	$4,950 - $6,350/month	197	228
J	$6,150 - $7,505/month	229	263
K	$7,157 - $8,335/month	264	304
L	$7,880 - $9,250/month	305	351
M	$8,900 - $10,175/month	352	405
N	$9,980 - $11,500/month	406	468
O	$11,250 - $12,750/month	469	499
P	$12,375 - $13,500/month	500	539
Q	$13,250 - $15,100/month	540	594
R	$14,850 - $16,250/month	595	654
S	$16,000 - $17,250/month	655	720
T	$16,995 - $18,150/month	721	793
U	$17,855 - $19,120/month	794	873
V	$18,955 - $20,150/month	874	961

24) Generate the Job/Points Matrix Report

With increasing numbers of evaluated jobs now entered the software, we recommend filtering and generating this particular job evaluation report - with or without job points included. The report will show the relative placement of each job in a grid that has Salary Grades down the left column and either Organization, Job Group or Job Family across the top. JET can first check the report to see if the logical placement of jobs makes sense to them, then begin to share department results with each department head to ensure any inconsistencies, misunderstandings or potential job evaluation anomalies are discussed and explained/ justified or revised as supported by additional information provided. The report can then be generated and reviewed by ever higher levels of management to ensure all jobs across the organization fall within a correct and justifiable level.



25) Review, build understanding, and adjust perspectives as required

Generate Job Descriptions from Encompassing Visions for distribution to management and employees. These reports will communicate a complete description of the accountabilities they are responsible for achieving, the technical skills they must apply, the evaluation rationale for the Job Level assigned to their work, and the most important behavioural competencies the jobs are expected to demonstrate. **Note: What gets included and not included in the Job Description is determined by your organizational needs** (see step **18.**)

A note about the 'Copy' functionality for Jobs

- Encompassing Visions™ contains functionality for expediting your job evaluation process through 'copying' (and also 'benchmarking', which is described in more detail in step **22** of this document). For 'copying, if an already evaluated job is very much like a job yet to be evaluated, ENCV allows you to copy the evaluated job by choosing which text fields to include in the copy, change whatever needs to be changed that makes it unique, then save it – creating an entirely new described and evaluated job in a matter of minutes. (In the navigation bar, go to **Jobs > Jobs > Actions: > select the copy job icon**.)

System Administrator:
A note about Multiple Job Questionnaires

- ENCV enables an organization to have multiple job incumbents individually complete the JPS Job Questionnaire for the same job. While accountability text fields and technical skills will be shared between job incumbents to build the best description of duties and expectations, individual responses to the JPS Job Questionnaire are not viewable by others. ENCV will summarize the completed surveys, calculate response averages, and present that one 'average' survey for organizational consideration. This functionality may prove helpful for several reasons including situations where employee 'buy-in' is critically important, the job supervisor is new and doesn't understand all the job specificities, etc.
- In setting up ENCV to have multiple incumbents and/or Job supervisor(s) complete the Job Questionnaire, we strongly recommend inserting a new job into the database with a Job Reference number having an appended extra letter. For example, if the actual/final Job Reference in ENCV needs to be #0123, insert the job with a Reference Number #0123A. Next, have every person providing input to that job answer the Questionnaire for, in this example, #0123A by enabling the 'User Assigned Jobs' functionality. Each completed Job Questionnaire will be individually stored in the software database, along with the User Id of the person who completed it. Collectively, each Questionnaire will be factored into determining not only the 'Average' response to each question, but also what the jobs 'Total Points' average is. This is important to know because every system generated report will base its information on this calculated 'Average'. At this stage, we recommend **copying** the job with the multiple completed Questionnaires attached (i.e., #0123A), entering the New Job Reference as the correct number (i.e., #0123), saving the copy, and then making the original job with the multiple attached Questionnaire (i.e., #0123A) '**Inactive**'. What this will have done for your organization is -
    - Enable the retention of all the completed, individual Questionnaires for future reference if required,
    - Ensure every Job showing in the list of Jobs has only one questionnaire (the 'Average') attached to it, and
    - Ensure that the impact of points/competencies with any future changes to the Questionnaire will be specific and clear.

The Value of Establishing Domain(s)

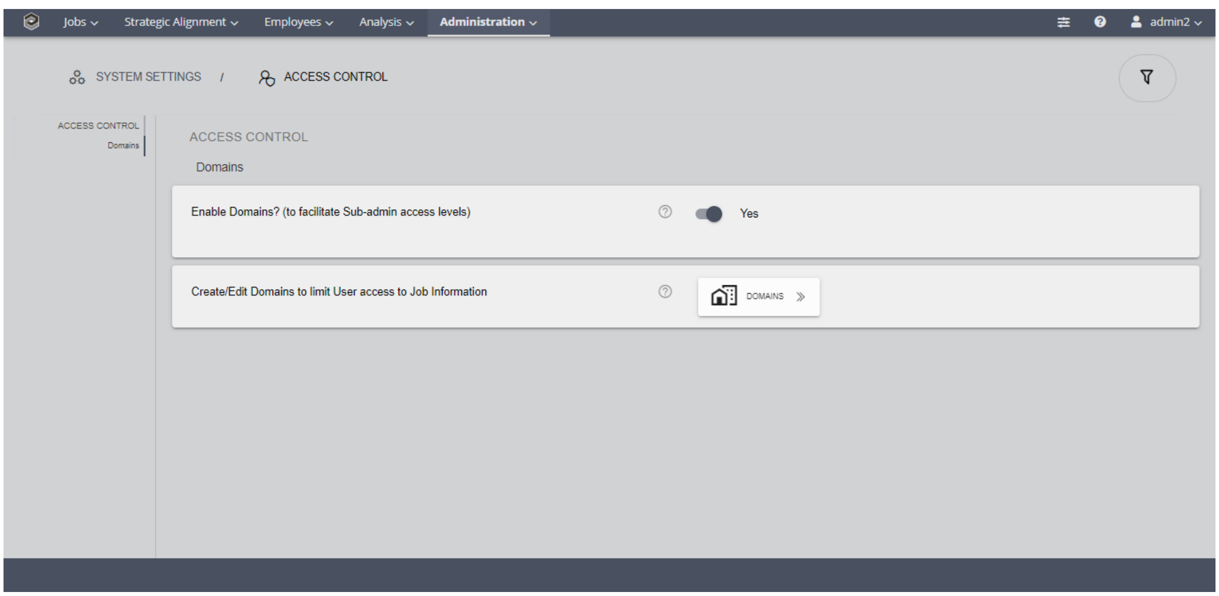
- Domains will enable organizations the opportunity to assign full, independent responsibility for job evaluation to a sub-set of jobs specifically domiciled to management personnel within an organizational structure, or to job evaluation sub-committees charged with the responsibility of independently defining jobs (and potentially evaluating them) within a particular Job Family or Job Group (e.g., developmental levels of Administrative Assistants, Engineers, etc.).

- For example, a user (i.e., a Domain Administrator) assigned to a particular Domain may be restricted to 'No access' or 'Read-only access' to ALL Jobs in the full Jobs database, but be given full security clearance to create/view/edit jobs and generate all job evaluation related reports for all, or a sub-set of jobs, within their assigned Domain.

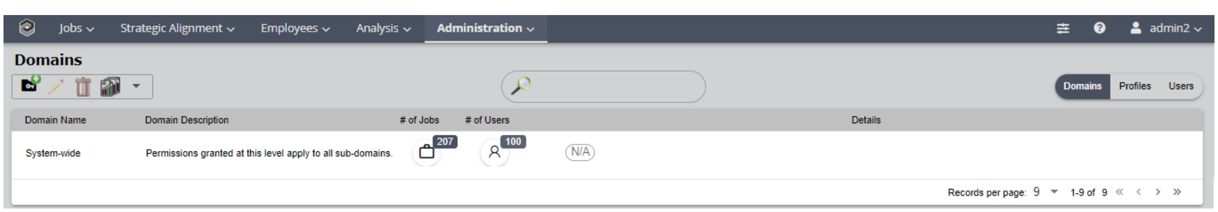
26)Identify and build the Domain(s) into the software

To configure the Domain(s) in Encompassing Visions™:

- **Administration > System Settings > Access Control > Enable Domains? (to facilitate Domain Admin access levels) > Set to 'Yes'**



- **Create/Edit Domains to limit User access to Job Information**



  - **Adding a Domain**

- Add Domain details to Encompassing Visions by **Administration > Domains > Add icon**
- Select and click on the criteria to establish the domain. All criteria selections are listed.

- This will bring up a pick list screen. Click on selection and you will be advanced to the '(Optional) Specify additional criteria' screen.

- Jobs must match: *** 'All' (and)** of the specified criteria.
  *** 'Any' (or)**
  *** 'A complex combination'**

Note:

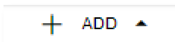
It is possible to mix the 'and' and 'or'. To help remember the context each job must match the entire criteria.

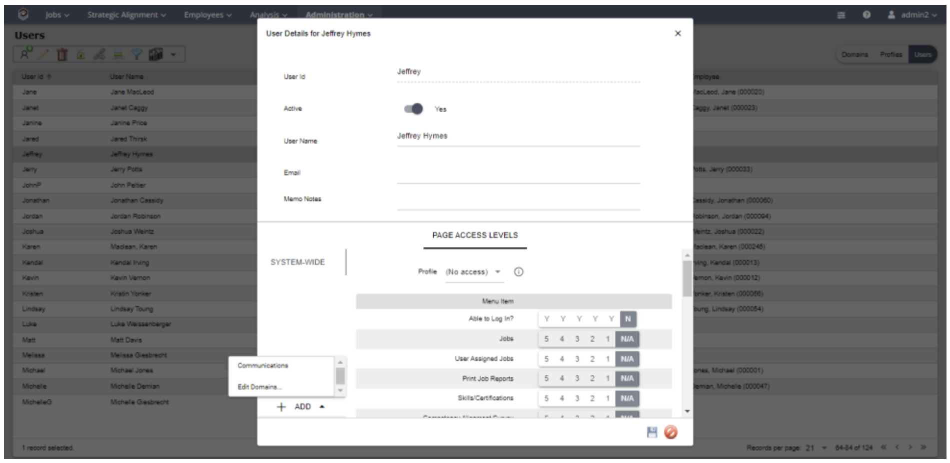
a) If you select '**Any**' it is easier to say, **"This Domain contains jobs that are either _ or _ (or both** *(additive)***)."**
b) If you select **'All'** it is easier to say, **"This Domain contains jobs that are both in the _ and_** *(subtractive).* **"**

- Click **“Next”** to move to the Name and Description screen to add the Domain Name and Domain Description.
- Click **“Finish”** to create your domain or **“Cancel”** to close the window.

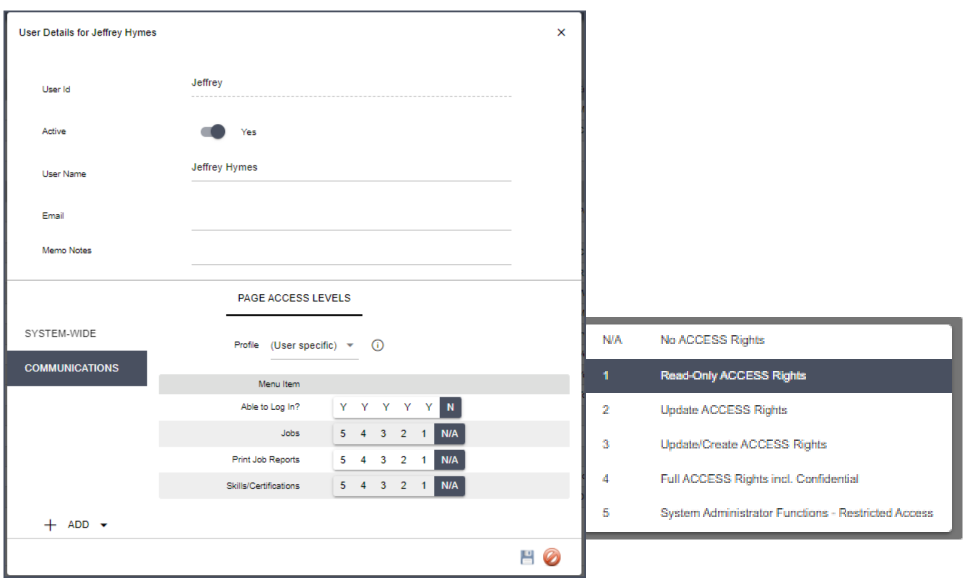
27)Identify and Add the Encompassing Visions™ Domain Administrator(s)

With data access security protocols, this person(s) will participate in the job evaluation process and run reports.

- **Administration>Users>Click on the Add icon.** Adding a new user is described [here](#).
- Assign a baseline Profile for staff interaction with the Job database.
- Click **“Save”** to save the new *User* or **“Cancel”** to close the window.
- Double click on selected *User’s* name to open the User Details screen.
- Click  to select and add domain to the User.



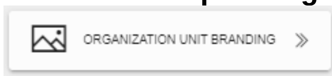
- Set the access levels per menu item.



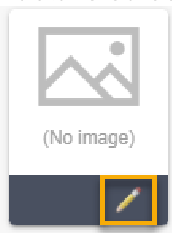
A ✓ will be in the Domain column, of the Users screen, to indicate the domain has been linked to the User.

28) Establishing Organization Unit Branding

To add the organization unit logo to the Job-Related reports:

- To upload the logo, go to **Administration>System Settings>Organization Branding>Organization Unit> Report Logos and Colors for Organization Units**.
    - Click on the 

 button to open the Organization Unit Branding Screen.
        - The logo maximum size is 2.5cm (1 in) tall by 10cm (4 in) wide. **Note:** Remove any excess padding and follow the directions of the generated warning, adjusting as required.
- Select the Organization Unit the logo should appear on.
    - Click the 'pencil' icon to open the details screen for selected organization unit.



    - Click the pencil icon to add logo.
        - A spinner will indicate that it is opening your folder that contains the logo(s) that is/are to be uploaded into the application.
        - The screen will refresh once the logo has been uploaded.
    - To introduce the organizations primary, secondary and tertiary branding colors into the Job-Related reports of each Organization Unit; unselect 'Use Default' to make a color selection from the palette options provided.
- Click **"Save"** to save the new details for the branding or **"Cancel"** to close the window.
- The Organization Branding Screen will show the uploaded logo(s) and branding colors.

29) Generate a Domain-Related Report

With increasing numbers of established domains now entered into the software, we recommend generating this particular report. The report will show the domain(s), relative criteria, and the Domain Administrator. This report can be printed.

30) Generate a User-Related Report

With Domain Administrator(s) added to the software, we recommend generating the User Domains Report to verify the Users assigned to each domain that have been set up by the organization. Once generated, the report can be printed.

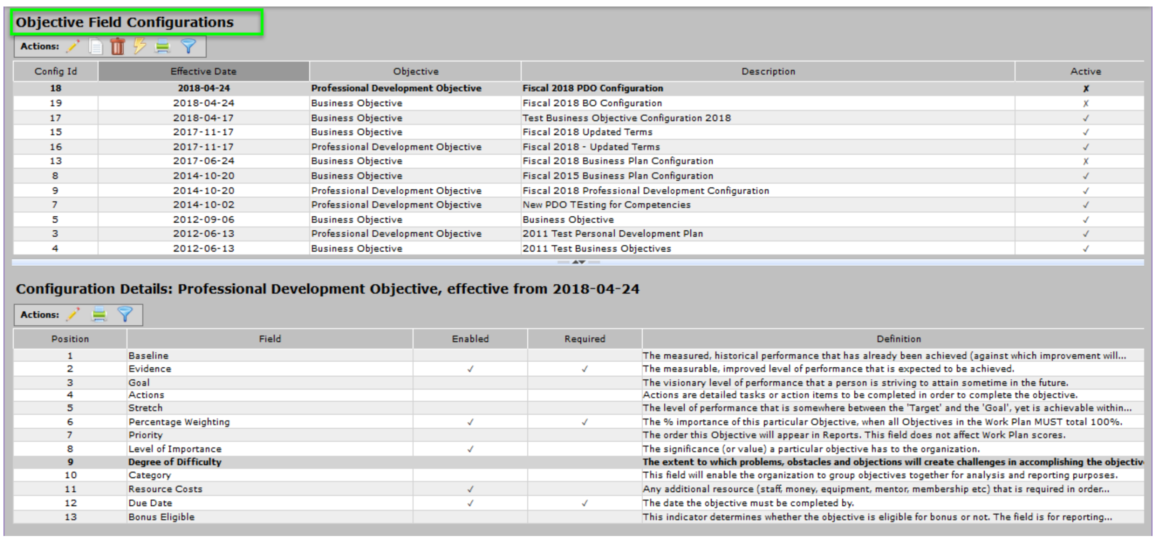
Learning and Growth Review Administration & Implementation

31)Ensure the Organization Structure is accurate

To configure Organization Structure in Encompassing Visions™ refer to step **16** Configuring the Organization Structure in the Job Evaluation section.

32)Configuring Objective Field Configurations

This feature governs the information viewable and required when an Employee (or their supervisor) creates ‘Business’ or ‘Professional Development’ Work Plans. If these measures are to be included in your Organization’s Learning and Growth Reviews process, go to **Employees > Employee Settings > Reviews > Customize > Objective Field Configurations.** Select Config Id ‘1’ and double click on the line labeled ‘Business Objectives’. At the bottom of the screen each field available will be displayed with/ without an Enabled and a Required flag. If they look fine, then leave as is. If you wish to change them, select the ‘Copy’ icon in the actions table and follow the on - screen instructions. When satisfied with the changes made to the new configuration, activate it by clicking on the lightening icon.



Objective Field Configurations

Actions:

Config Id	Effective Date	Objective	Description	Active
18	**2018-04-24**	**Professional Development Objective**	**Fiscal 2018 PDO Configuration**	**✗**
19	2018-04-24	Business Objective	Fiscal 2018 BO Configuration	✗
17	2018-04-17	Business Objective	Test Business Objective Configuration 2018	✓
15	2017-11-17	Business Objective	Fiscal 2018 Updated Terms	✓
16	2017-11-17	Professional Development Objective	Fiscal 2018 - Updated Terms	✓
13	2017-06-24	Business Objective	Fiscal 2018 Business Plan Configuration	✗
8	2014-10-20	Business Objective	Fiscal 2015 Business Plan Configuration	✓
9	2014-10-20	Professional Development Objective	Fiscal 2018 Professional Development Configuration	✓
7	2014-10-02	Professional Development Objective	New PDO TEsting for Competencies	✓
5	2012-09-06	Business Objective	Business Objective	✓
3	2012-06-13	Professional Development Objective	2011 Test Personal Development Plan	✓
4	2012-06-13	Business Objective	2011 Test Business Objectives	✓

Configuration Details: Professional Development Objective, effective from 2018-04-24

Actions:

Position	Field	Enabled	Required	Definition
1	Baseline			The measured, historical performance that has already been achieved (against which improvement will...
2	Evidence	✓	✓	The measurable, improved level of performance that is expected to be achieved.
3	Goal			The visionary level of performance that a person is striving to attain sometime in the future.
4	Actions			Actions are detailed tasks or action items to be completed in order to complete the objective.
5	Stretch			The level of performance that is somewhere between the 'Target' and the 'Goal', yet is achievable within...
6	Percentage Weighting	✓	✓	The % importance of this particular Objective, when all Objectives in the Work Plan MUST total 100%.
7	Priority			The order this Objective will appear in Reports. This field does not affect Work Plan scores.
8	Level of Importance	✓		The significance (or value) a particular objective has to the organization.
9	**Degree of Difficulty**			**The extent to which problems, obstacles and objections will create challenges in accomplishing the objectiv**
10	Category			This field will enable the organization to group objectives together for analysis and reporting purposes.
11	Resource Costs	✓		Any additional resource (staff, money, equipment, mentor, membership etc) that is required in order...
12	Due Date	✓	✓	The date the objective must be completed by.
13	Bonus Eligible			This indicator determines whether the objective is eligible for bonus or not. The field is for reporting...

Repeat the same process for Config Id ‘2’ to review/update Enabled and Required fields for Professional Development Objectives**. Note:** The new configurations will be enabled by the software 24 hours after they have been ‘Activated’.

33)Configure the Employee Learning and Growth Review Report

Elements in the Employee Learning and Growth Review *layout* can be turned on or off to reflect the information your organization would like to see in the report. To configure the Employee Learning and Growth Review Report layout/sections in Encompassing Visions™:

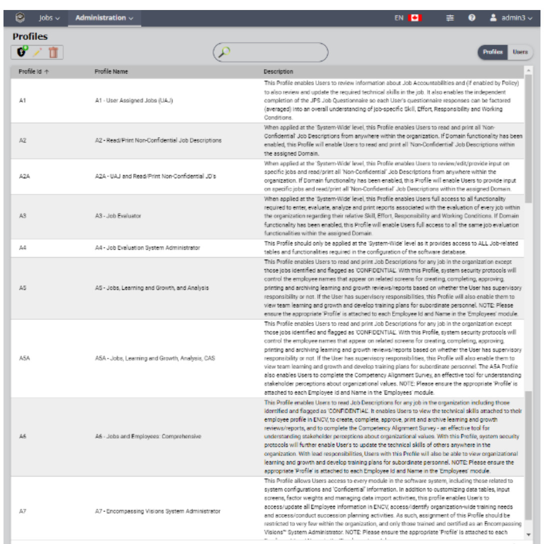
- **Employees > Employees Settings > Reports > Report Options > Customize > View: Learning and Growth Report Options**.

- Check each element you wish to see on the learning and growth reports.
    - **System** means all users – Administrators and non-Administrators

34) Review User Profile Settings

To review User profiles: **Administration > System Setup>Profiles**

- Several User profiles are pre-built in the application. The default profiles can be customized, or new profiles developed as required. Contact your consultant or ENCV Client Relations for detailed help with profiles to review what the current / default configurations enable, or if you require any unique configurations for organizational staff.
- Domain(s) may be assigned to an Employee if they are to be a Domain Administrator. Refer to step **27** Identify and Add the Encompassing Visions™ Domain Administrator(s) in the Job Evaluation section.



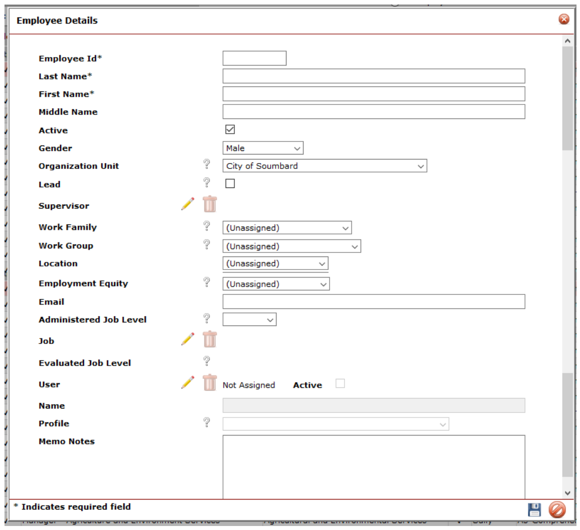
a) Review Policy Settings

To review Policy Settings related to what distribution of valuing Competencies, Business Objectives and Professional Development Objectives (out of 100%) best reflects your organization's needs.
Employees>Employee Settings>Reports>Learning and Growth Reports> "What percentage of the overall score will be made up of the Competency Review/Business Objectives/Professional Development review?"

35)Load and Link Employee Names with User Id's and User Profiles

To add a new 'Active' employee to the table -

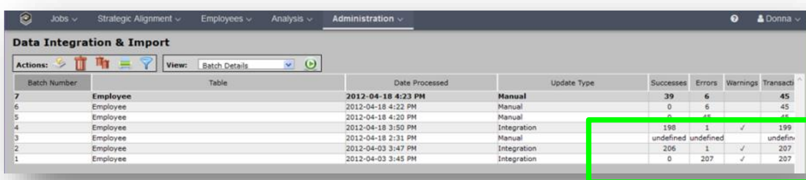
- **Employee Module> Employees > Actions > New**
  - Enter the Employee Id and Name (check the active box). Be sure the Employee Id corresponds with their payroll Employee Id.
    - Using the pick lists, complete the employee information.
    - Attach a Supervisor (Policy must be enabled)
    - Attach job assignment – click to add or change Job Assignment, attach new job assignment, select job, attach selected job assignment, Save or Cancel.
    - Create a User Id – click the button, click on the Actions/Add icon,



create a User Id, establish a password, select a Profile, and Save by clicking on the diskette icon. **Note:** You may want to record the User Id and Password created to provide same to the Employee and enable them with System access. The User's profile is automatically updated in the User's module.
    - Attach profile.
    - Click Save or Cancel.
    - Complete Employee Skills if applicable – **View: Employee Skills >Go> "Add New".** Search for skill(s) in the pick list, Attach Selected Skill, Save or Cancel if not attaching skill.
    - Close when complete.

- **Note 1:** If your organization uses the organization chart to designate reporting relationships, be sure to mark the employee as the **"Lead"** of their assigned organization unit. That way, the application will accurately identify them as default reviewers for subordinate staff in that part of the organization and enable them to print learning and growth reports for subordinate staff as well.

- **Note 2:** ‘Import’ functionality within the software enables the transfer of data from other applications to Encompassing Visions to reduce data entry requirements when there are large record sets involved. The import process is helpful when setting up job reference tables, employee, and user information. For regular, ongoing synchronization with other applications, the Automated Import Service can be used. Call your ENCV Client Relations contact for more information on this service.



36)Employee Skills/Skills Expiration/Employee Skills Admin

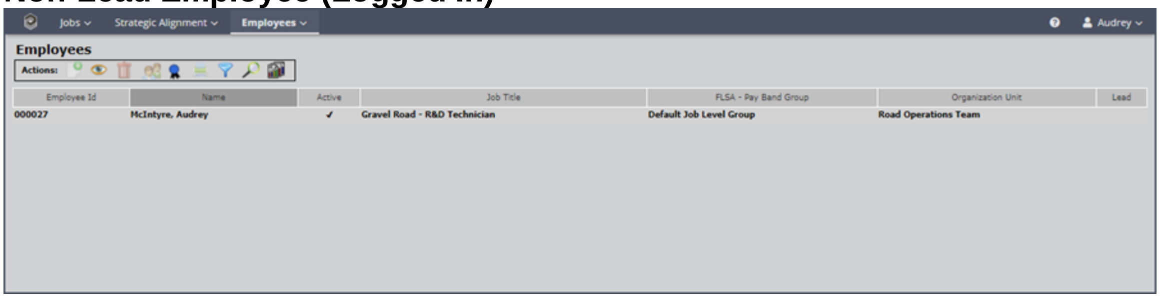
- The system is populated with a Technical Skills Library where specific catalogued skills (titled and defined) can be selected and attached to each employee.

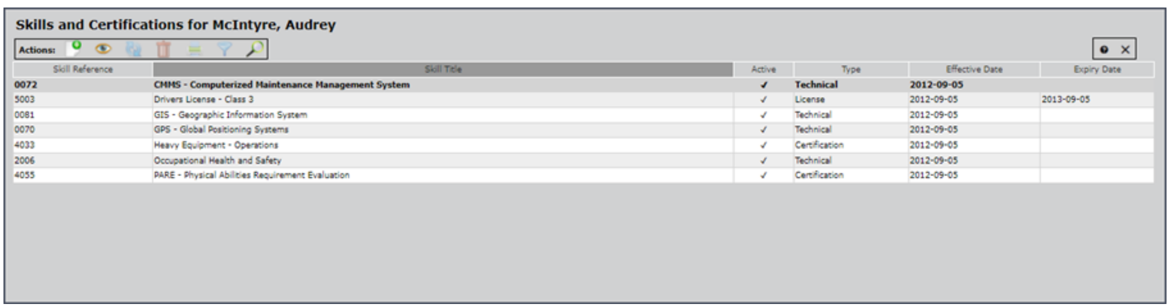
  - The general approach to establishing the Skills and Certifications is:
    - 1) Decide what type of Skill and Certification information you want to track at your organization.
    - 2) Review the default Skill Types provided and determine which ones are required for your Organization and how the Reviewable Indicators should be set (See **Jobs > Job Settings > Core Tables > Skill Type**).
    - 3) Determine whether any of the Skill Types will still require grouping by Category or Sub-Category and establish the appropriate Categories and Sub-Categories (**Jobs > Job Settings Skills/Certifications > Skill Categories**).
    - 4) Set up the Skills and Certifications that are to be tracked.

- This function will ensure individual employees (when the user is logged in) are able to **view** their personal skills/skill expirations, with 'Leads' able to **update** the Skills/Skills Expiration of their subordinates.

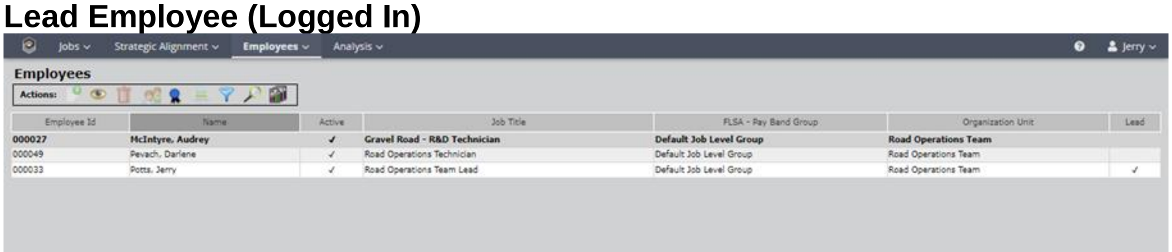
  Note: Make sure 'Employee Skills Access and Employees' **(Administration>Profiles)** are set to '3' in the assigned Profiles.

Non-Lead Employee (Logged In)

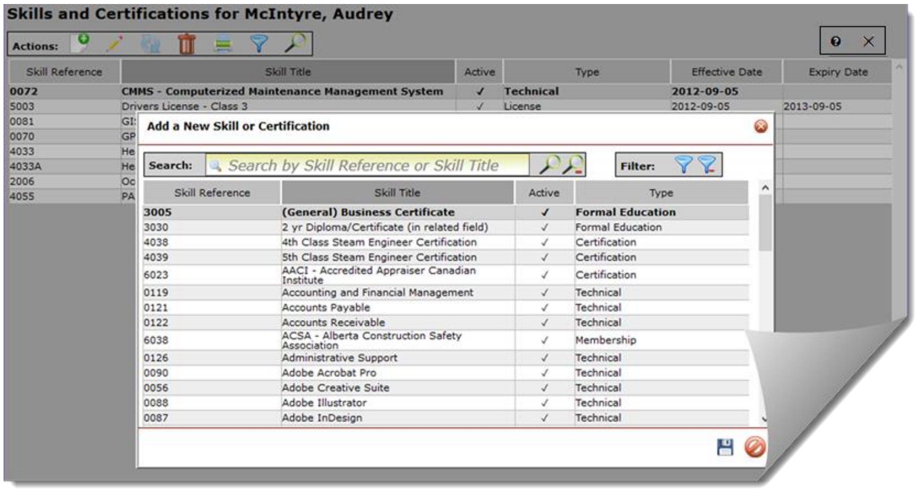




Lead Employee (Logged In)



The system will display employee names based on the person who is logged in and their supervisory responsibility. The Lead will be able to *add, edit, review,* and *delete* skills for their direct reports.



Non-Lead Employees with ‘Employee Skills Admin’ functionality

Lead Employees may choose to delegate responsibility for maintaining staff technical skills and designations to non-Lead personnel in the division, department, or section they are the ‘Lead’ of. As the ENCV System Administrator you can help them set this up by giving ‘Employee Skills Admin’ to the employee(s) they identify by going to ‘Employees’ in the navigation bar, then selecting **Employees > doubling clicking on the name of the Employee to be given this responsibility > ticking the box on the Employee Details screen for ‘Employee Skills Admin’.**

> **Note:** Make sure the following Profile is assigned to the employee being given this functionality. **(Administration>Profiles)** has ‘3’ access to ‘Employee Skills Access’ and ‘Employees’ options.

37) “Train the Trainers” on use and functionality of the system

- Spend time training the trainers to complete learning and growth reviews using the Encompassing Visions software. A maximum of 15-20 employees per 2-hour session (to enable a manageable question and answer time), it's important to outline how the job description and strategic values of the organization link to the Competencies and Work Plan objectives that employee learning and growth will be assessed against. The goal of these sessions will be to train managers, supervisors, and employees in using Encompassing Visions™ to:

  - enter business and professional development objectives.
  - select reviewers (single and/or 360-degree evaluations).
  - understand the linkage of competencies to job descriptions and strategic plans.
  - complete learning and growth reviews of competencies, business, and professional development objectives; and
  - print learning and growth review summary reports, as appropriate.

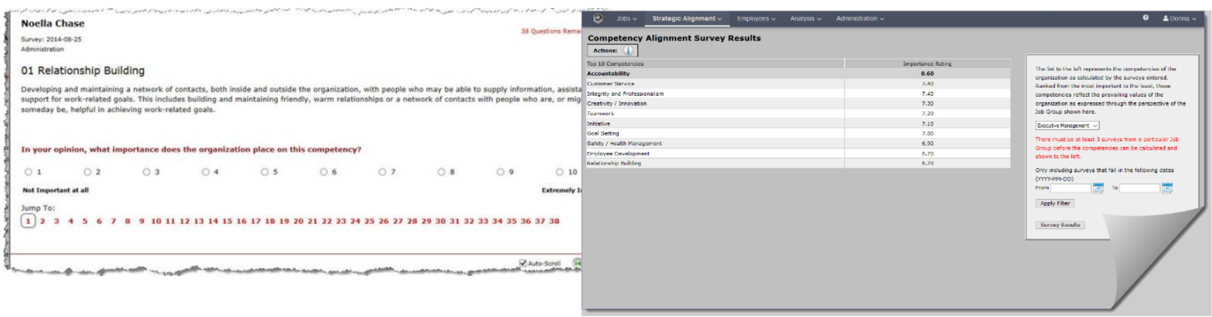
Employee training on the Encompassing Visions application should be conducted upon implementation for all individuals who will be accessing the system to enter objectives, complete reviews, or review system-generated results. Contact ENCV Client Relations or your consultant for documents that might assist in the training process.

38) Conduct a Strategic Alignment Survey – Optional (at any time).

Based on the theory that "perception is reality", people tend to emulate those traits and behaviors they see as being positively rewarded by decision makers within their organization. Hopefully what employees "perceive" to be important is in fact what the organization wants them to see as important. The Competency Alignment Survey is designed to get at that measure. The results are designed to visually identify alignment - or variance - in perceptions. The goal of tracking survey results over time is to ensure that perception ***and*** reality become the same thing. Only then can an organization be comfortable in knowing they don't have well intended employees doing counterproductive things, simply because of misaligned understandings.

Over time, compiled results of this survey indicate how effectively Encompassing Visions – through its job evaluation, learning and growth management, training and succession planning modules - is changing employee perceptions about what the organizations vision, values and culture are, and what it takes to be successful. To complete this survey, employees will need a user profile that allows them to log into ENCV and navigate to the survey. **Strategic Alignment > Competency Alignment Survey / Results**

Note: Administration>Profiles '3' setting for option 'Competency Alignment Survey.



Learning and Growth Reviews

Learning and Growth reviews will always be more accurate, objective, and meaningful when input and feedback are consistently anchored to job-specific expectations. That's what Encompassing Visions (ENCV) does. Based on the roles people are specifically responsible for, ENCV will enable each person's contributions to be measured at the individual, team and organizational level in up to three (3) different ways.

- **Competencies** demonstrated.
- **Business Objectives** accomplished.
- **Personal Development Objectives** achieved.

Let's start by talking about **Competency** reviews.

Competency Reviews

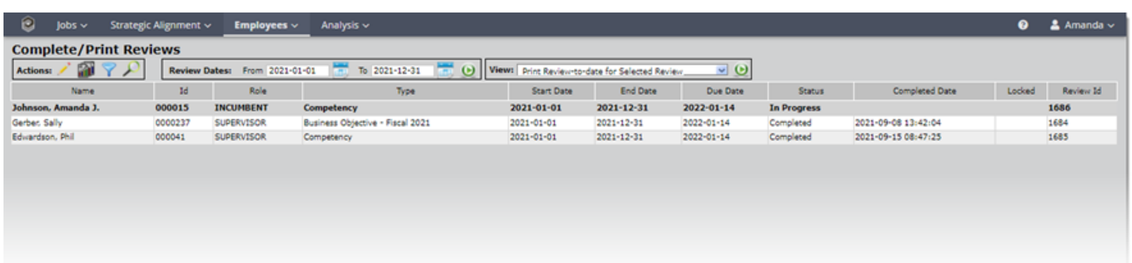
Competency reviews focus on the job-specific and strategically relevant _behaviours_ and _technical skills_ each person is expected to demonstrate because of the specific job they are in.

The importance of a competency in each job is software-identified from Job Descriptions and Job Evaluation results stored in ENCV. As soon as an employee is attached to a particular job in the ENCV database, the software can ensure every learning and growth review will always be anchored to what each job incumbent is uniquely paid to do.

And please remember, if at any time someone in the organization feels the importance of a specific behavioural competency is under or over-rated, or the technical skills listed in the learning and growth review are not the right or even the best one's, be sure to encourage them to speak with the Human Resources Department. There may be a requirement to update the linked Job Description and Job Evaluation result.

39) Completing a Competency Review

1. Leads and Non-Leads will be navigated directly to the Complete Review screen when they log in. On that screen they will see their name as well as a) the names of any direct reports and b) the names of others in the organization who may have asked to receive learning and growth feedback as part of a multi-rater (360 degree) learning and growth review. Each required review will have a review period and the date by which the Competency Review is to be completed. ***They are encouraged to start reviews and include supporting comments at any time during the review period.*** If they do, they just need to make sure they save their input at the end of each session by clicking on the (SAVE) icon. As the Administrator, you just need to ensure that ***all*** reviews are entirely completed by the 'Due Date' showing.



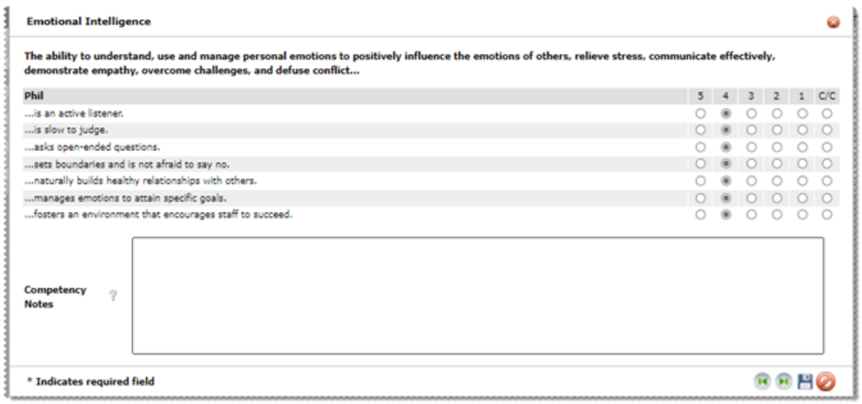
Note: As mentioned earlier, the Competency Review questions they will be answering are automatically generated by the software and will always be based on what the job incumbent is specifically paid to do.

2. For **Competency Reviews**, the screen will display the behaviours and skills that the Leads (Supervisors/Managers) and Non-Leads (Employees) need to review. When a review is opened, it is assigned the status of 'In-Progress'. There is also a column

headed ‘Sub-Review Status’ which indicates the number of detailed questions related to the specific Competency, and how many have already been answered.

Only the most important Competencies in a person’s job will have detailed questions attached, and that threshold of what defines ‘Importance’ was set as an organizational standard by your executive management team. So, if you see a dash (‘-‘) in the Competency row, it means there are no sub-review questions because the Competency did not reach the threshold of importance in the Incumbents job.

Each Competency has a rating scale that will have already been determined as **1-5** or **1-10** by the organization. Regardless of which scale is enabled, the software will display a ‘tooltip’ definition for each number when the mouse is hovered over top of any response option.

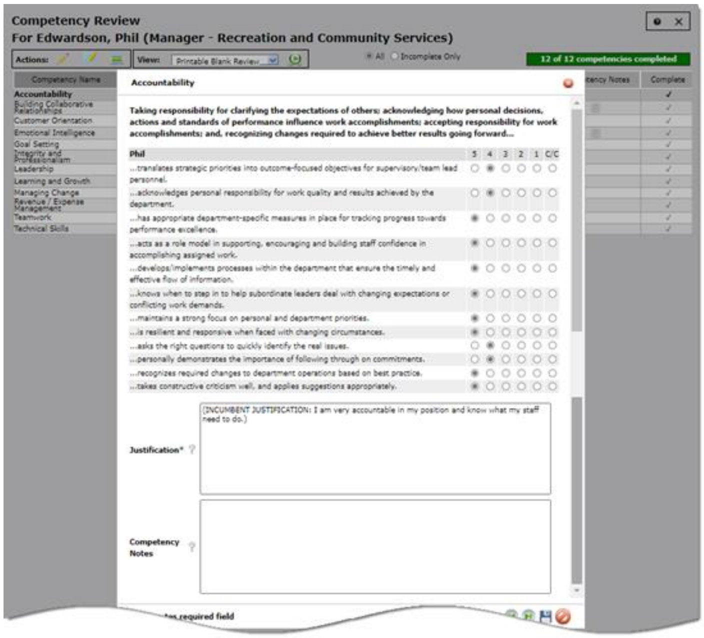


If the reviewer is unable to answer a question for any reason, they should select C/C (‘Cannot Comment’) as the response. Use of Cannot Comment ***does not*** negatively affect the employee’s final Learning and Growth score.

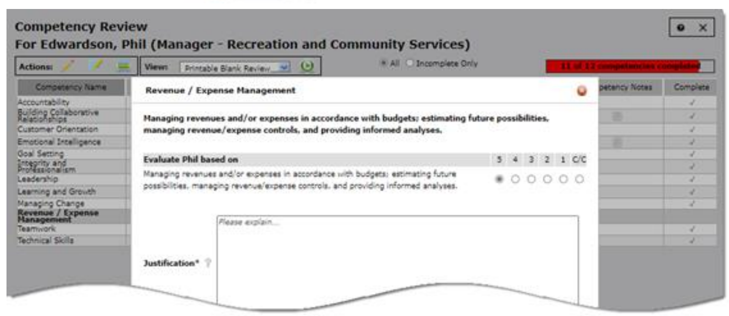
The text field headed ‘Competency Notes’ is not typically a required component of the review process, but it is provided to enable important ***general*** comments to be made about the Competency. All comments entered will be included in the final Learning and Growth Review Report.

IMPORTANT! - All competencies do NOT have to be reviewed at one time. In fact, it will possibly be better, more thoughtful feedback if the reviewer doesn’t try to do it all at once. Reviews in the Encompassing Visions software system can be saved and returned to at any point during the review period. The software will keep the review open, even if every Competency has already been reviewed, until the ‘Due Date’ has been reached.

Based on default Policy settings, the system will automatically prompt Justification comments if responses have resulted in an overall *‘High’* or *‘Low’* rating for the related Competency. The review will not be considered ‘Complete’ by the software until all required **Justifications** have been entered.



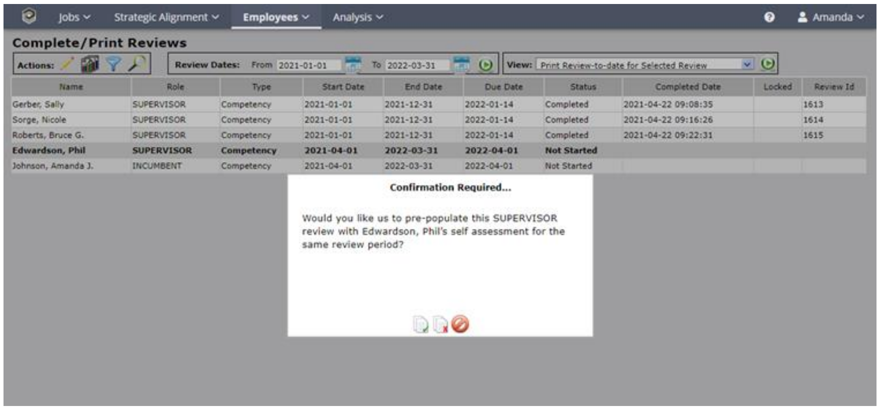
OR



To facilitate the convenience of completing Learning and Growth Reviews, ENCV is now available as a **Mobile App** on your Android/iOS cell phone or tablet. See "Completing Reviews with the Mobile App" (Step 50), for more information.

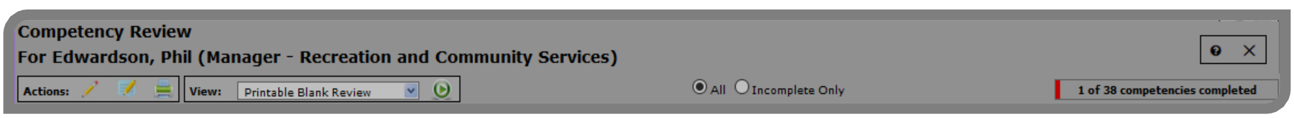
40) Copying a Completed 'INCUMBENT' Review

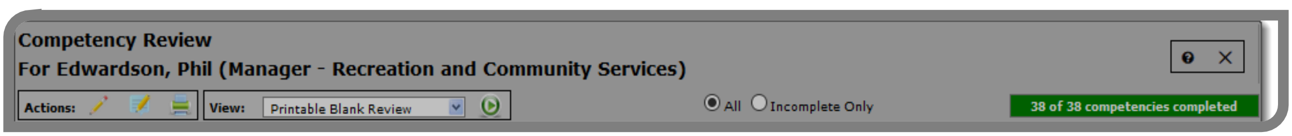
Through a Policy setting in the software, Encompassing Visions can be set up to enable a Supervisor/Manager to copy the 'INCUMBENT' Competency review of a direct report when the review is for the same review period and has already been completed by the incumbent. This functionality may prove valuable to Supervisors/Managers because it provides them with upfront information about staff perspectives on how well they think they did during the review period. It also has the potential to save them time in the completion of direct report Competency reviews. With copying, all responses and comments entered by the incumbent will be migrated into what will then become the 'SUPERVISOR' review. **The original 'INCUMBENT' review remains in the software database, unchanged.** At this point, the Supervisor/Manager can make whatever changes and comments they think are necessary in their review, knowing that it will now reflect the Supervisor/Managers perspective, and how well they correlate with the perspectives of the person being reviewed. Please note that by default the related Policy setting is set to be enabled but can be disabled by going to **Employees** in the navigation bar, then choosing **Employee Settings>Reviews>*'Do you want to allow supervisors to copy their employees incumbent review?'*** and changing the Policy value to 'No'.



41)Checking Your Progress!!

At the top of the Competency Review screen, the reviewer will notice an indicator that shows the review status and information about how many Competencies in the review have been completed.



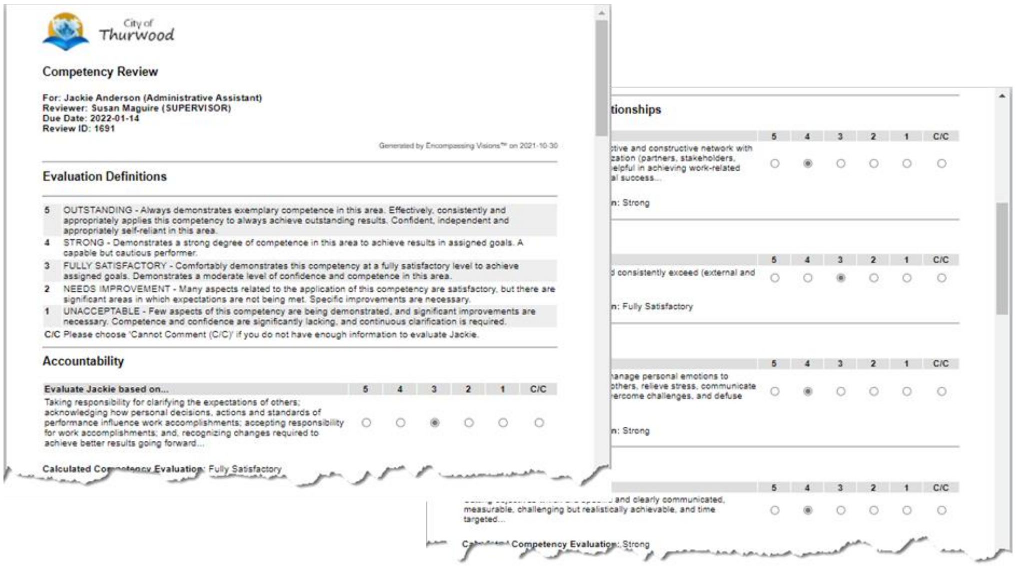


42) Print Review-to-date

On some occasions it may be more convenient to print the learning and growth review on paper to complete it (i.e., when internet connectivity is limited or not possible). If that is the case, and a review (already started) is needed to be completed offline –

1. In the 'Employees module', select the Employee name in the table with a single click of the mouse.
2. From the 'View' drop down list, select "Employee Reviewers/Reviews."
3. Select the "Review" from within the reviews screen. The review will be "In-Progress."
4. From the 'View' drop down list select the ''Printable Review-to-Date."
5. Click the "green arrow."
6. The Competency Review will print to the screen.
7. Print, Save or Export the report.

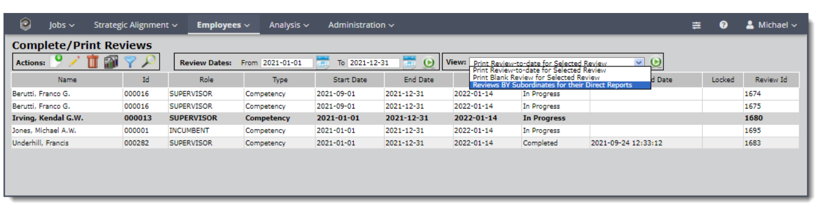
Please remember that any responses and comments recorded on this paper copy will need to be keyed into the software later.



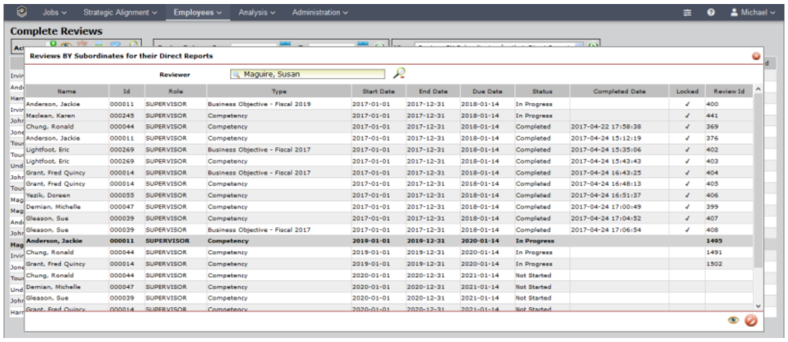
Note: The option ‘Print Review-to-Date’ displays a printable copy of the review that includes any responses and comments that were previously entered into the software by the Supervisor/Manager or Employee for that specific review.

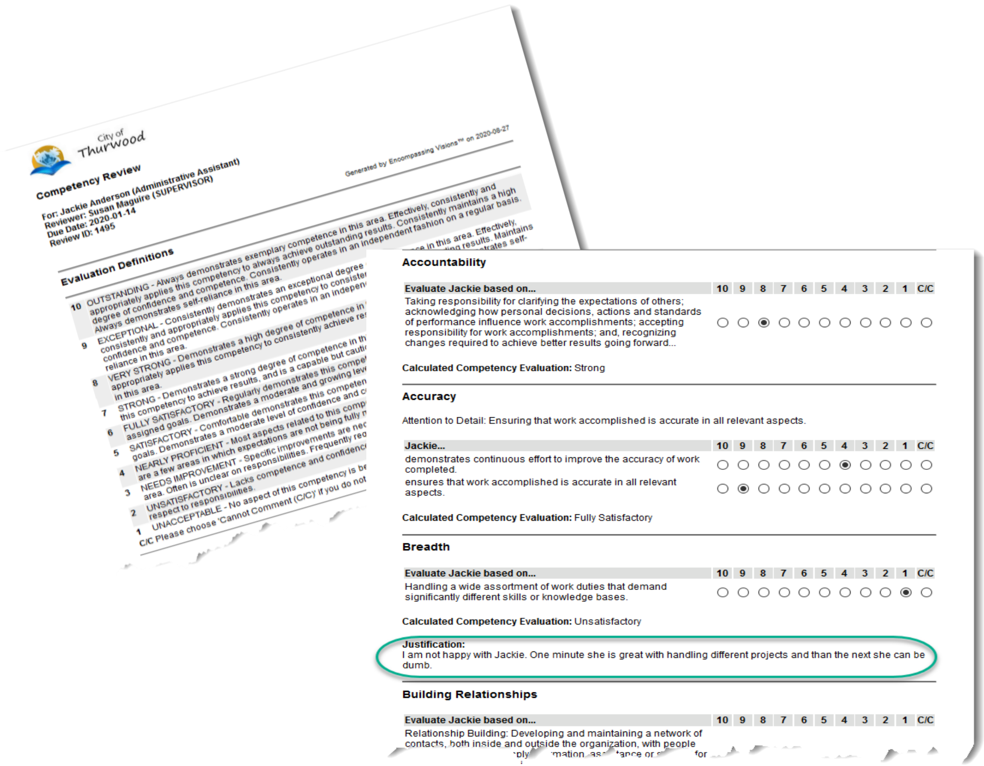
43)Reviews BY Subordinates for their Direct Reports

This function enables Supervisors/Managers to have a look at learning and growth reviews being completed by direct reports who are reviewing the Manager’s indirect reports. It will tell the Supervisor/Manager whether reviews of indirect reports have been started so they can follow up in a timely fashion to ensure they get done on time. It will also enable them to potentially address any areas of concern with the review well before the review is considered complete and approved by their direct reports and the employee under their supervision. Access is restricted based on the organizational relationships of the person logged in.



a. **Note:** For CONFIDENTIALITY reasons, this function is disabled for any direct report self-assessments (i.e., ‘INCUMBENT’ reviews).



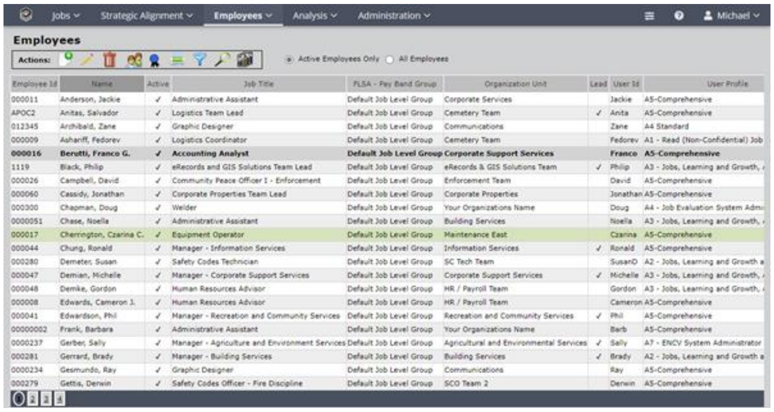


If the Status of a review is showing ‘Not Started’, you will also notice that the  icon (showing at the bottom right of the screen) will be grayed out.

44) Printing A Learning and Growth Report

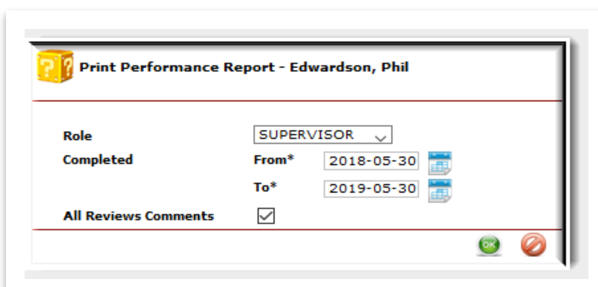
Once the Employee or Supervisor/Managers has completed the Competency Review, they (or you on their behalf) should -

- Scroll over the **Employees** header in the navigation bar at the top of the screen.
- Select **Employee** and select Employee name**.**



- Select “Generate Employee Reports ( )”.

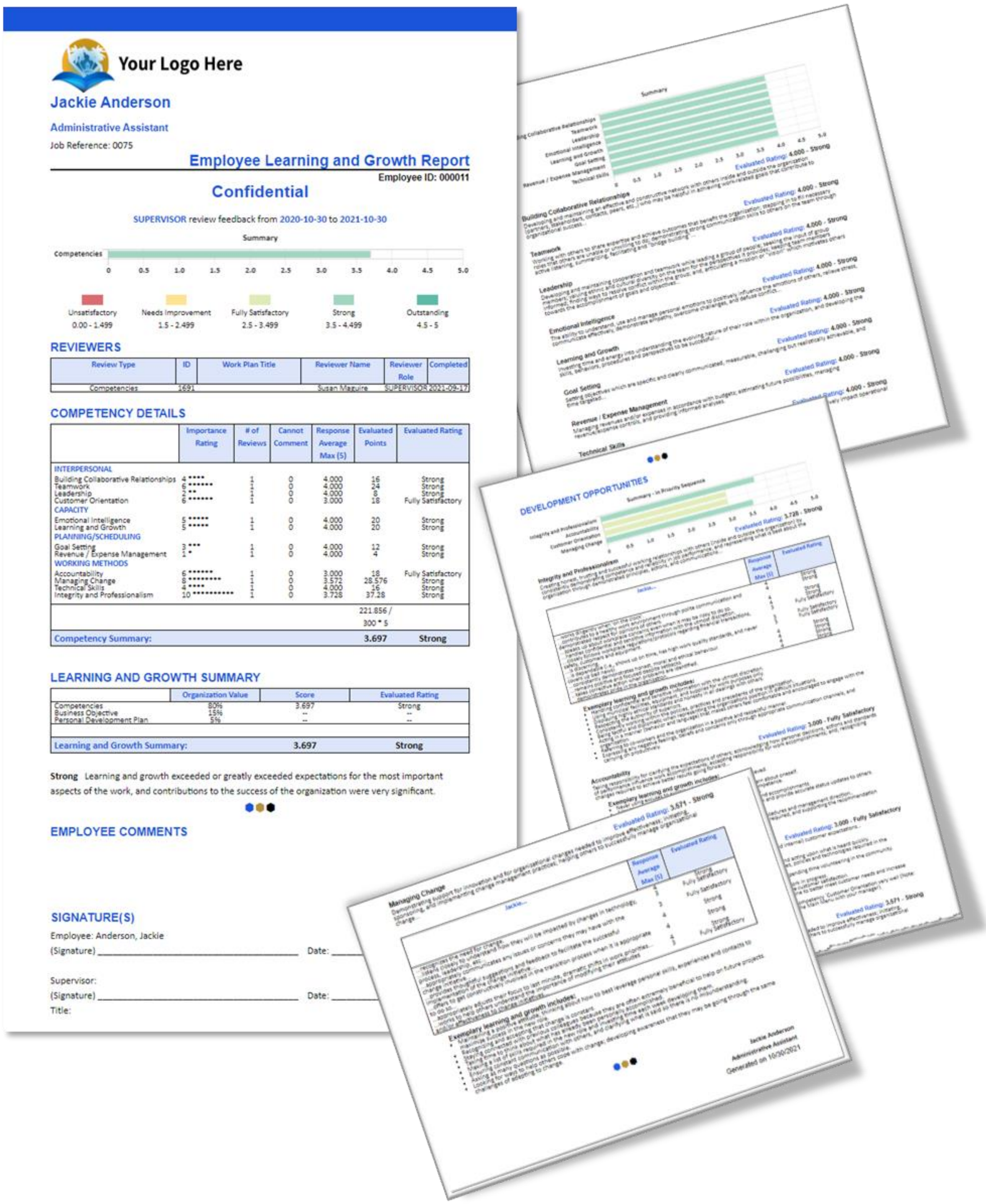
a. Filter the employee list as required. If you need to see all the employees, simply clear filters ( ).



1) Default Filter parameters will be displayed. Make sure the ‘Role’ and date range for when the review was ‘Completed’ are accurate. It might be of value to include comments from others if there were more than just your review completed during the selected review period. Select ‘All Reviewer Comments’ if you would like to include them in the system generated Learning and Growth report, then click the green ‘OK’ button.

Please note that only responses from the selected reviewer role will be included in the calculated Learning and Growth rating. Further, ENCV ensures that individuals printing a Learning and Growth report for themselves – regardless of the ‘Role’ they select – are limited to only seeing their personal (i.e., ‘INCUMBENT’) review. One more thing… If the Supervisors/Managers are seeing the ‘INCUMBENT’ comments showing up twice in the report, its because they didn’t delete the ‘INCUMBENT’ comments in ***their*** *‘SUPERVISOR’ review when they copied the ‘INCUMBENT’ review. Please advise them to do that now.*

Ideally, before the review 'Due Date' has been reached, the Supervisor/Manager should plan to meet with each staff member separately to review and finalize the documentation. If they believe changes are appropriate to make following discussion(s) with the employee, the Supervisor/Manager should make them in their 'SUPERVISOR' review.



Your Logo Here

Jackie Anderson

Administrative Assistant

Job Reference: 0075

Employee Learning and Growth Report

Employee ID: 000011

Confidential

SUPERVISOR review feedback from 2020-10-30 to 2021-10-30

Summary

Competencies

0 0.5 1.0 1.5 2.0 2.5 3.0 3.5 4.0 4.5 5.0

Unsatisfactory 0.00 - 1.499 | Needs Improvement 1.5 - 2.499 | Fully Satisfactory 2.5 - 3.499 | Strong 3.5 - 4.499 | Outstanding 4.5 - 5

REVIEWERS

Review Type	ID	Work Plan Title	Reviewer Name	Reviewer Role	Completed
Competencies	1691		Susan Maguire	SUPERVISOR	2021-09-17

COMPETENCY DETAILS

	Importance Rating	# of Reviews	Cannot Comment	Response Average Max (5)	Evaluated Points	Evaluated Rating
INTERPERSONAL						
Building Collaborative Relationships	4 ****	1	0	4.000	16	Strong
Teamwork	6 ******	1	0	4.000	24	Strong
Leadership	2 **	1	0	4.000	8	Strong
Customer Orientation	6 ******	1	0	3.000	18	Fully Satisfactory
CAPACITY						
Emotional Intelligence	5 *****	1	0	4.000	20	Strong
Learning and Growth	5 *****	1	0	4.000	20	Strong
PLANNING/SCHEDULING						
Goal Setting	3 ***	1	0	4.000	12	Strong
Revenue / Expense Management	1 *	1	0	4.000	4	Strong
WORKING METHODS						
Accountability	6 ******	1	0	3.000	18	Fully Satisfactory
Managing Change	8 ********	1	0	3.572	28.576	Strong
Technical Skills	4 ****	1	0	4.000	16	Strong
Integrity and Professionalism	10 **********	1	0	3.728	37.28	Strong
					221.856 / 300 * 5	
Competency Summary:					3.697	Strong

LEARNING AND GROWTH SUMMARY

	Organization Value	Score	Evaluated Rating
Competencies	80%	3.697	Strong
Business Objective	15%	--	--
Personal Development Plan	5%	--	--
Learning and Growth Summary:		3.697	Strong

Strong Learning and growth exceeded or greatly exceeded expectations for the most important aspects of the work, and contributions to the success of the organization were very significant.

EMPLOYEE COMMENTS

SIGNATURE(S)

Employee: Anderson, Jackie

(Signature) ______________________ Date: ______

Supervisor:

(Signature) ______________________ Date: ______

Title:

45) Competency Rating Calculations

Competency ratings in ENCV are significantly influenced by two things: 1) the relative importance (from 1 to 10) of each competency in the job the incumbent is paid to do, and 2) how well job incumbents are demonstrating those job competencies. In this way, incumbents performing very important job competencies at a high level will likely realize a very good overall competency rating in ENCV, even if some lesser important job competencies are not performed at the same level of proficiency.

In the Employee Learning and Growth Report, the job competency '**Importance Rating**' assigned to each listed competency is system-generated based on the Job Description and Job Evaluation process that determined the job level / compensation range for the job. Having this direct link (unique to ENCV) helps to ensure a clear and consistent understanding of expectations and deliverables between the incumbent and their supervisor. It also guarantees that Learning and Growth ratings are truly based on what the job incumbent is paid to do, not what the employee or supervisor thought the job required.

Feedback objectivity is supported by ENCV as it enables one or multiple reviewers to provide Learning and Growth feedback for individuals on their team.

Objectivity is further supported with multiple detailed questions that are system prompted for every competency that has a high 'Importance Rating' (usually 7 or higher) in the job performed by the person being reviewed. Having detailed questions ensures measures are more consistent and reviews more thorough. Any competencies scored as 'Cannot Comment' are excluded from all calculations within ENCV. That ensures a person's 'Overall Competency Rating' is not inappropriately impacted - positively or negatively.

So, lets have a look at how the calculations work...

1. In the Employee Learning and Growth Report, each listed Competency has an 'Importance Rating' that is unique to the job the employee is assigned. As mentioned, this 'Importance Rating' comes directly from the Job Description and Job Evaluation process (i.e., it is tied directly to what the job incumbent is paid to do.)
2. The report will list the number of people (# of Reviewers) who completed a Learning and Growth review for the employee during the selected review period.
3. Any reviewers who couldn't evaluate a competency will be counted under the 'Cannot Comment' column.
4. The 'Response Average (max **5** or **10**)' reflects the rating scale that reviewers used (**1-5**, or **1-10**) to respond to Competency review questions in the Learning and Growth review. The number in this column attached to each Competency is the specific response (if one question) *or* the average of all detailed responses calculated by ENCV to three (3) decimal places.
5. The numbers showing in the 'Evaluated Points' column are the result of multiplying **'Importance Rating'** x '**# of Reviews'** x '**Response Average'** -
   a. The <u>*total actual*</u> 'Evaluated Points' are calculated by the software by adding up the individual 'Evaluated Points' for each competency listed/reviewed.

b. The *total potential* 'Evaluated Points' are calculated by the software by adding up what the total number would have been if the incumbent had received a perfect rating (5/5 or 10/10) for every competency listed/reviewed.
c. Dividing the '*total actual*' points by the '*total potential*' points and multiplying the result by 5 (or 10, depending on the rating scale used) determines the Learning and Growth Rating to three (3) decimal places. This number is displayed under the column headed 'Evaluated Rating'.

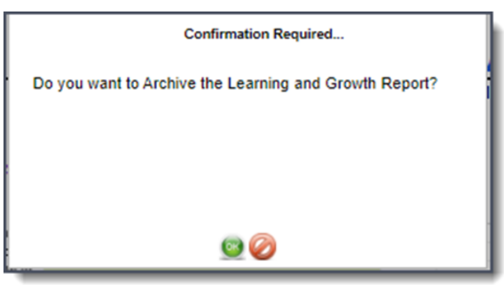
6. The resulting number is then mapped into the Competency Summary table displayed in the report to provide terminology and definition to the Learning and Growth rating calculated by the software.

46) Archive and Approve a Learning and Growth Report

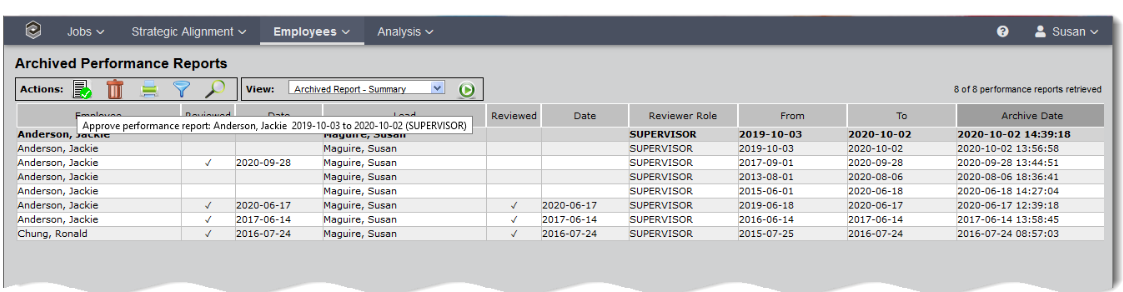
If your organization has determined that Learning and Growth Reports are to be electronically archived and approved, the Supervisor/Manager should -

1. Generate the learning and growth report by selecting the 'Print Learning and Growth Report for selected Employee' in the Actions bar of the '**Complete/Print Reviews**' screen in the options under '**Employees**' of the navigation bar at the top of the screen. Select the employee from the list and be sure to include the appropriate Reviewer(s) and Review Period.
2. Click the Archive Report button in the 'Actions' bar at the top of the Learning and Growth Report screen.

A notice will be generated by the software asking if you want to archive the report. Click 'OK', a notice will be generated by the software advising that the report has been archived.

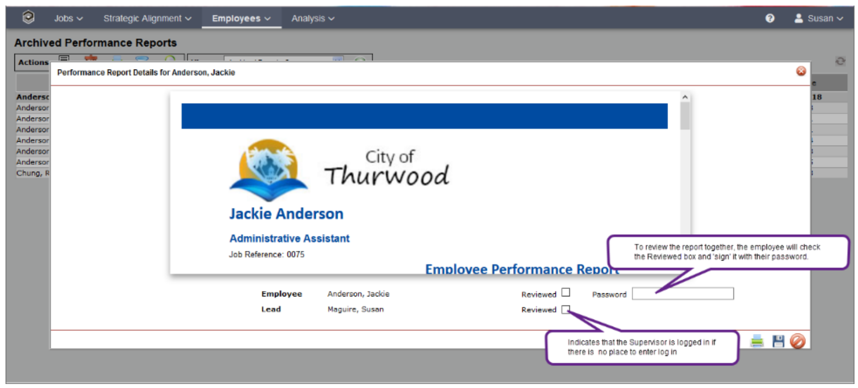


a. By selecting 'OK', the system will take the Supervisor/Manager to the archived reports list and highlight the review just archived.



Employee	Reviewed	Date	Lead	Reviewed	Date	Reviewer Role	From	To	Archive Date
Anderson, Jackie			**Maguire, Susan**			**SUPERVISOR**	**2019-10-03**	**2020-10-02**	**2020-10-02 14:39:18**
Anderson, Jackie			Maguire, Susan			SUPERVISOR	2019-10-03	2020-10-02	2020-10-02 13:56:58
Anderson, Jackie	✓	2020-09-28	Maguire, Susan			SUPERVISOR	2017-09-01	2020-09-28	2020-09-28 13:44:51
Anderson, Jackie			Maguire, Susan			SUPERVISOR	2013-08-01	2020-08-06	2020-08-06 18:36:41
Anderson, Jackie			Maguire, Susan			SUPERVISOR	2015-06-01	2020-06-18	2020-06-18 14:27:04
Anderson, Jackie	✓	2020-06-17	Maguire, Susan	✓	2020-06-17	SUPERVISOR	2019-06-18	2020-06-17	2020-06-17 12:39:18
Anderson, Jackie	✓	2017-06-14	Maguire, Susan	✓	2017-06-14	SUPERVISOR	2016-06-14	2017-06-14	2017-06-14 13:58:45
Chung, Ronald	✓	2016-07-24	Maguire, Susan	✓	2016-07-24	SUPERVISOR	2015-07-25	2016-07-24	2016-07-24 08:57:03

- The Supervisor/Manager should now request the Employee to log into the software and ask them to click on the ‘Archived Learning and Growth Reports’ option under ‘Employees’ in the header bar. The Employee should then review and complete the ‘Employee Comments’ section at the bottom of the Archived report, tick the box labelled ‘Reviewed’, and **then be sure to ‘Save’** the information by clicking on the ‘Save’ icon.



- Once the Employee has entered their comments and designated the Learning and Growth report as ‘Reviewed’, the Supervisor/Manager can now see the ‘Employee Comments’ entered, designate the report as ‘Reviewed’ by them as the ‘Lead’, and then click on the ‘Save’ icon. (**Note:** If the Supervisor/Manager has any issues or concerns with what the employee entered in the ‘Employee Comments’ section, these should be discussed and resolved at this time. To make any change to Employee Comments, the employee must first remove their ‘Reviewed’ designation for the archived report. They need to be logged into ENCV to do this. Alternatively, if the Supervisor/Manager has generated the report and he or she is reviewing it with the employee on their computer monitor, the employee can remove their ‘Reviewed’ status - and prove they are in fact the employee - by entering their ENCV password when prompted.)

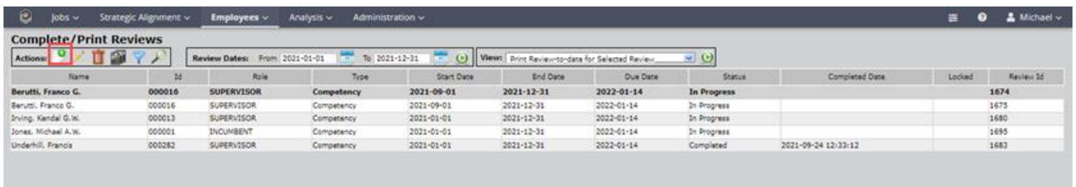
b. If “Cancel” is selected, the system will close the screen. The Archived report will have been saved, but without any comments or a ‘Reviewed’ designation in the software. That information will still need to be entered at another time. When the Reviewer and Reviewee are ready to, instruct them to follow the same simple steps outlined above (i.e., navigate to ‘**Employees**’, click on the ‘Archived Learning and Growth Reports’ option, select the specific Archived Learning and Growth report they are looking for, and double click the mouse.)

47) Adding Additional Reviewers

As highlighted earlier, ENCV automatically sets up the secured ability for you, and each member of the different Organizational units to do self-assessments. Called ‘INCUMBENT’ reviews in the software, this functionality enables people to communicate how well they think they demonstrated the Competencies required in their roles.

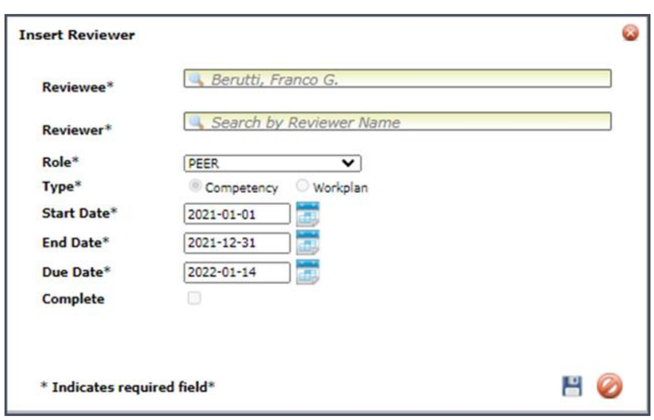
For each Supervisor/Manager or Team Lead, they will also automatically be asked to review the job-specific behaviours and technical skills demonstrated by their direct reports in what is called ‘SUPERVISOR’ reviews.

Sometimes it is helpful to also invite others to provide Learning and Growth feedback from a ‘Client’, ‘Peer’, or ‘Subordinate’ perspective. With more diverse perspectives about the behaviours and technical skills demonstrated, there is a heightened probability that the summarized Learning and Growth feedback will be more thorough and objective - and perceived as so.



By default, the Policy setting that allows Supervisors/Managers to add Reviewers for staff reporting directly or indirectly to them is enabled. You can change it by going to Administration in the navigation bar, then choosing Employees>Employee Settings>Reviews> ***Do you want to allow Leads/Supervisors to add/delete reviewers in the Complete Reviews page?*** and select ‘No’ as the Policy Value.

1. Identify and agree with the employee about who may be best suited to be an additional Reviewer, and request that person’s permission/approval to be added as a ‘Reviewer’.
2. Go to the ‘**Employees**’ option in the navigation bar at the top of the screen and select the option ‘Complete/Print Reviews’. On the Complete/Print Reviews’ screen, single click on the name of the employee they want to add a reviewer for, and then click on the add  icon.



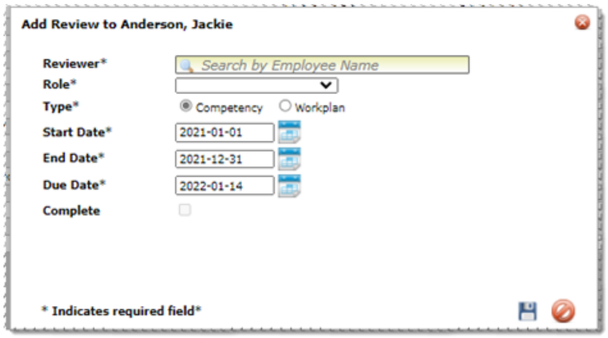
3. The ‘Insert Reviewer’ screen will open.
4. The ‘Reviewee’ will be the name of the employee they have previously selected to add a reviewer to.
5. Search for the name of the person they would like to add as the ‘Reviewer’. In the ‘Reviewer’ text field, begin typing either their first or last name. The system will suggest people who match their search criteria from within.
6. Select the ‘Role’ of the Reviewer based on their relationship with the Reviewee. Click on the arrow down to see the available options.
7. Review ‘Type’ will default to the selected (highlighted) review and cannot be changed. *See the example provided above. Phil Edwardson and his ‘Competency’ review have been selected, which is why the ‘Competency’ review is the selected default in this filter.*
8. Carefully review to make sure the review default dates (‘Start Date’, ‘End Date’, and ‘Due Date’) are correct.
9. Click the ‘Save’ icon to add the Reviewer, or ‘Cancel’ if they decide not to add them as a Reviewer.

   When the added new ‘Reviewer’ next enters the ‘Complete/Print Reviews’ module of ENCV, they will now see the name of the employee they previously agreed to provide learning and growth feedback for.

If the Organization has chosen to *‘not’* turn on the policy for Supervisors/Managers to add a Reviewer; then you, as the ‘System Administrator,’ may add reviewers on behalf of the Supervisor/Managers.

a. Identify with the Supervisor/Manager who will be required to be added as a Reviewer after ensuring that person’s permission/approval to be added as a ‘Reviewer’.
b. Go to the ‘**Employees**’ option in the navigation bar at the top of the screen and select the option ‘Employees’. Single click on the name of the employee they want to add a reviewer for.
c. Single click on the name of the employee they want to add a reviewer for.
d. On the ‘Employees’ screen, select ‘*Add/Edit Reviewers for selected Employee’* from the ‘Actions’ box.
e. Click the “”
f. From the ‘REVIEWS FOR…..’ screen, click on the add  icon.
g. The ‘Insert Review’ screen will open.
h. Search for the name of the person they would like to add as the ‘Reviewer’. In the ‘Reviewer’ text field, begin typing either their first or last name. The system will suggest people who match the search criteria.
i. Select the ‘Role’ of the Reviewer based on the relationship with the Reviewee. Click on the arrow down to see the available options.
j. ‘Review ‘Type’ will default to the selected (highlighted) review.
k. Carefully review to make sure the review default dates (‘Start Date’, ‘End Date’, and ‘Due Date’) are correct.
l. Click the ‘Save’ icon to add the Reviewer, or ‘Cancel’ if it is decided not to add them as a Reviewer.

m. When the added new ‘Reviewer’ next enters the ‘Complete/Print Reviews’ module of ENCV, they will now see the name of the employee they agreed to provide learning and growth feedback for.

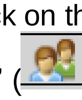


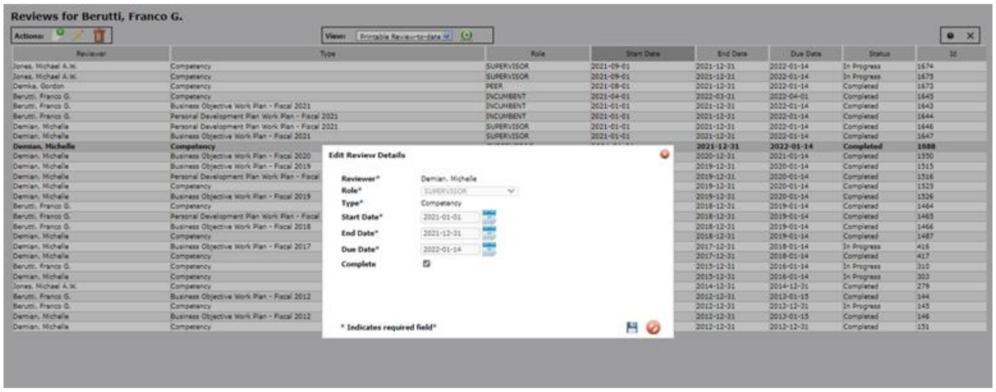
48) Locked Reviews

Your organization will have set a time limit for the length of time that reviews are available to be edited after they are completed. This time limit could be days or weeks, depending on what the organization prefers. What this means for the reviewer is that they can complete the review in Encompassing Visions and then go back and make changes until the review is locked. The reviewer can enter responses and add notes to the Competency review throughout the review period. *The review will not lock until a) the review itself has been completed, b) the review due date has passed, and/or c) the Lock period has been exceeded.*

As the Administrator, you can view these Policy settings for Competency Reviews by navigating to Employee Settings, of the Employees module, in the navigation bar, then selecting Core Tables>Category (pulldown arrow)>Review Type>Competency and then double click to edit ‘Lock Period’.

Completed and locked reviews cannot be modified by Employees or Supervisors/Managers. If a change to a locked Review is required, it must first be unlocked by the Administrator as only they have that system authority. Please note that even for you as the system Administrator, a review can only be unlocked if it was completed/locked no later than for last year's review period.

To unlock a Competency Review, go to Employees in the navigation bar, select **Employees** > single click on the employee’s name with the locked review > click on the ‘Add/Edit Reviewers’ () option > double click on the Competency Review needing to be ‘unlocked’ > then make the review Incomplete (i.e. ‘Unlocked’) by removing the completion status on the Edit Review Details screen. Save, or Cancel.



Note: The Review status can only be changed to incomplete (IN PROGRESS). As the Administrator you will not be able to mark the review Complete. The Reviewer must go back to the Review and make any necessary changes for the review status to be reset to Complete.

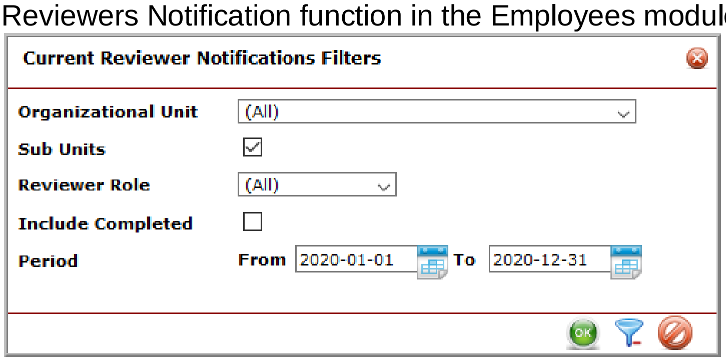
49) Review Notifications

Administrators can identify and advise reviewers (organization-wide or department-specific) of upcoming/late learning and growth reviews.

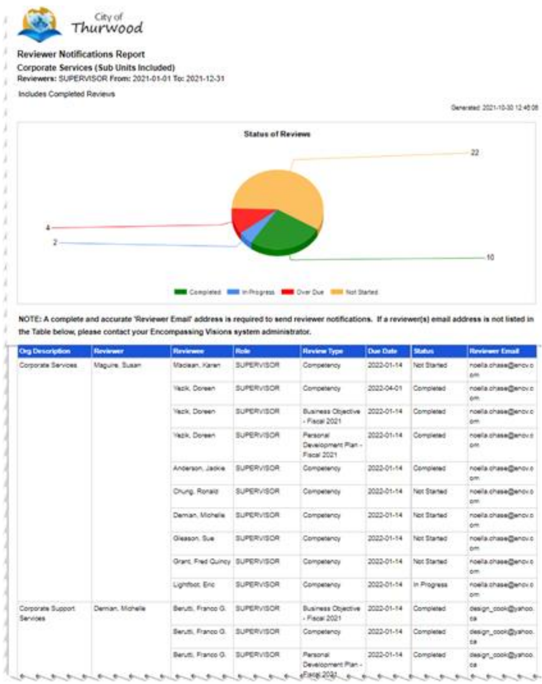
Please consult with your IT department prior to turning on notifications. See System Settings located in the Administration Module. "Emails". These policies enable notifications to be sent from the application.

This function will generate system-wide E-mail notifications to remind Reviewers to complete upcoming Learning and Growth Reviews and when Learning and Growth Reviews are overdue. It uses the Expected Review Date of the Reviewers to determine which Reviewers are to be notified.

Core Tables, in the Employees Module under Employee Settings, contains the E-mail Message Defaults that are available to view and customize the base text for the messages. Notifications can be sent to a selected group of Reviewers from the Reviewers Notification function in the Employees module.



- Click 'OK' to generate (run) the Reviewer Notification Report.
- Click to clear all filters and reset filters to default.
- Click 'Cancel' to close.



City of Thurwood

Reviewer Notifications Report
Corporate Services (Sub Units Included)
Reviewers: SUPERVISOR **From:** 2021-01-01 **To:** 2021-12-31

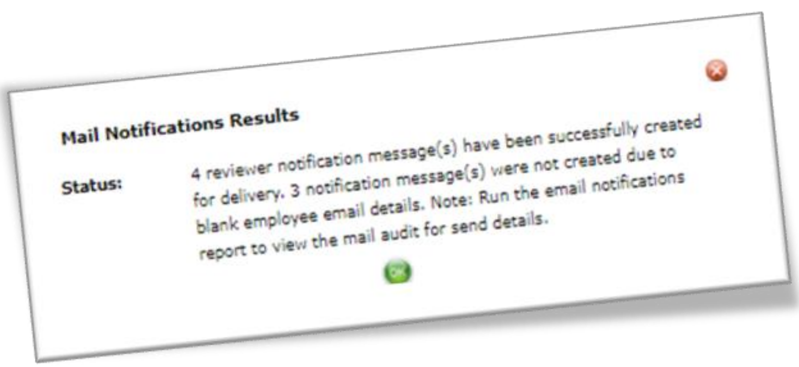
Includes Completed Reviews

Generated: 2021-10-30 12:45:08

NOTE: A complete and accurate 'Reviewer Email' address is required to send reviewer notifications. If a reviewer(s) email address is not listed in the Table below, please contact your Encompassing Visions system administrator.

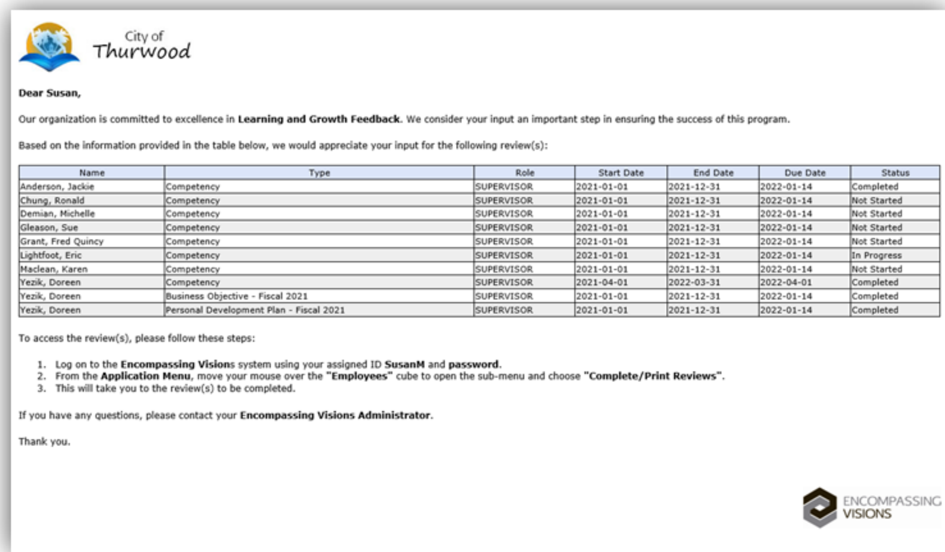
Org Description	Reviewer	Reviewee	Role	Review Type	Due Date	Status	Reviewer Email
Corporate Services	Maguire, Susan	Maclean, Karen	SUPERVISOR	Competency	2022-01-14	Not Started	noella.chase@encv.com
		Yacik, Doreen	SUPERVISOR	Competency	2022-04-01	Completed	noella.chase@encv.com
		Yacik, Doreen	SUPERVISOR	Business Objective - Fiscal 2021	2022-01-14	Completed	noella.chase@encv.com
		Yacik, Doreen	SUPERVISOR	Personal Development Plan - Fiscal 2021	2022-01-14	Completed	noella.chase@encv.com
		Anderson, Jackie	SUPERVISOR	Competency	2022-01-14	Completed	noella.chase@encv.com
		Chung, Ronald	SUPERVISOR	Competency	2022-01-14	Not Started	noella.chase@encv.com
		Demian, Michelle	SUPERVISOR	Competency	2022-01-14	Not Started	noella.chase@encv.com
		Gleason, Sue	SUPERVISOR	Competency	2022-01-14	Not Started	noella.chase@encv.com
		Grant, Fred Quincy	SUPERVISOR	Competency	2022-01-14	Not Started	noella.chase@encv.com
		Lightfoot, Eric	SUPERVISOR	Competency	2022-01-14	In Progress	noella.chase@encv.com
Corporate Support Services	Demian, Michelle	Berutti, Franco G.	SUPERVISOR	Business Objective - Fiscal 2021	2022-01-14	Completed	design_cook@yahoo.ca
		Berutti, Franco G.	SUPERVISOR	Competency	2022-01-14	Completed	design_cook@yahoo.ca
		Berutti, Franco G.	SUPERVISOR	Personal Development Plan - Fiscal 2021	2022-01-14	Completed	design_cook@yahoo.ca

1. Click to generate the “Send Notifications’ window.
2. Click ’OK’ to run the notifications.



After the system has processed the notifications, a status window explains how many reviewer notification message(s) have been successfully created for delivery and how many were not created due to missing (blank) email addresses.

Example of a Review Notification



City of Thurwood

Dear Susan,

Our organization is committed to excellence in **Learning and Growth Feedback**. We consider your input an important step in ensuring the success of this program.

Based on the information provided in the table below, we would appreciate your input for the following review(s):

Name	Type	Role	Start Date	End Date	Due Date	Status
Anderson, Jackie	Competency	SUPERVISOR	2021-01-01	2021-12-31	2022-01-14	Completed
Chung, Ronald	Competency	SUPERVISOR	2021-01-01	2021-12-31	2022-01-14	Not Started
Demian, Michelle	Competency	SUPERVISOR	2021-01-01	2021-12-31	2022-01-14	Not Started
Gleason, Sue	Competency	SUPERVISOR	2021-01-01	2021-12-31	2022-01-14	Not Started
Grant, Fred Quincy	Competency	SUPERVISOR	2021-01-01	2021-12-31	2022-01-14	Not Started
Lightfoot, Eric	Competency	SUPERVISOR	2021-01-01	2021-12-31	2022-01-14	In Progress
Maclean, Karen	Competency	SUPERVISOR	2021-01-01	2021-12-31	2022-01-14	Not Started
Yezik, Doreen	Competency	SUPERVISOR	2021-04-01	2022-03-31	2022-04-01	Completed
Yezik, Doreen	Business Objective - Fiscal 2021	SUPERVISOR	2021-01-01	2021-12-31	2022-01-14	Completed
Yezik, Doreen	Personal Development Plan - Fiscal 2021	SUPERVISOR	2021-01-01	2021-12-31	2022-01-14	Completed

To access the review(s), please follow these steps:

1. Log on to the **Encompassing Visions** system using your assigned ID **SusanM** and **password**.
2. From the **Application Menu**, move your mouse over the **"Employees"** cube to open the sub-menu and choose **"Complete/Print Reviews"**.
3. This will take you to the review(s) to be completed.

If you have any questions, please contact your **Encompassing Visions Administrator**.

Thank you.

ENCOMPASSING VISIONS

1. Click to run the Email Log Report.
2. Click to purge the email logs.

Organizational Learning and Growth

50) Organizational Learning and Growth

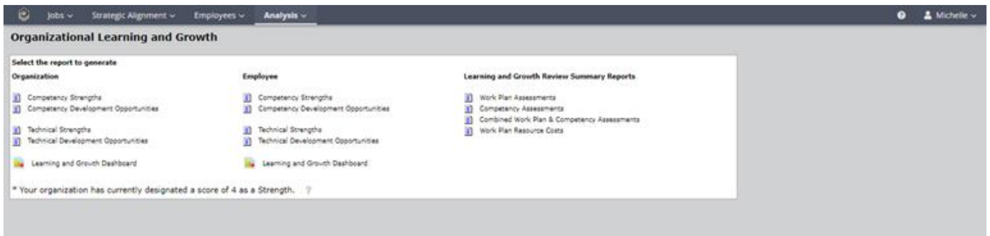
Developing employees makes good business sense because it communicates a genuine interest in their future. Training builds loyalty and engagement while increasing productivity because talented people appreciate meaningful support when coaching and mentoring are made available to them. And the most effective programs emphasize a correlation between personal development and Learning and Growth review feedback; that way, people can clearly see that their career growth and success requires evolving their expertise through training.

But like other capital investments, senior management needs to know what the measurable outcomes of employee development will be so they can accurately determine rates of return.

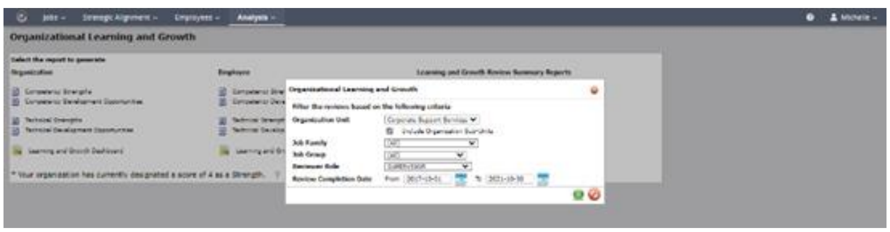
ENCV consolidates employee learning and growth feedback to any required level within your organization. In the process it quantifies training needs, identifies potential mentors, and enables the impact of training investments to be measured. Further, it magnifies the importance of continuing to invest in employee development when improvement is quantified and can be seen to closely correlate with the learning and growth targets of the organization (e.g., increased efficiency, revenue growth, expense management, productivity, etc.).
The software can quickly consolidate information to show you in a dashboard graphic how well each department is performing vis-a-vis the organization as a whole. Information generated includes a detailed breakdown of competency strengths and weaknesses, and a prioritized list of training needs so the organization can immediately

1) know which training investments have the greatest potential to impact team learning and growth, and 2) track year over year changes in team learning and growth to verify that training investments had the expected impact on improving team learning and growth.

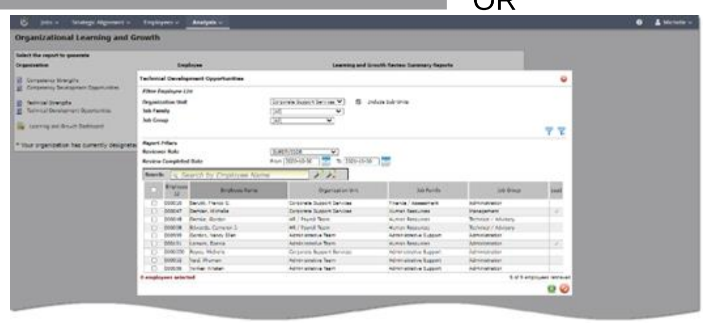
On the navigation bar at the top of the screen, hover your mouse over the header labelled '**Analysis**' and select 'Organizational Learning and Growth'. A filter will be displayed for determining what specific information you would like to include in the analyses.



Select any area of the organization from the pull-down options that you have been asked to generate the report for.



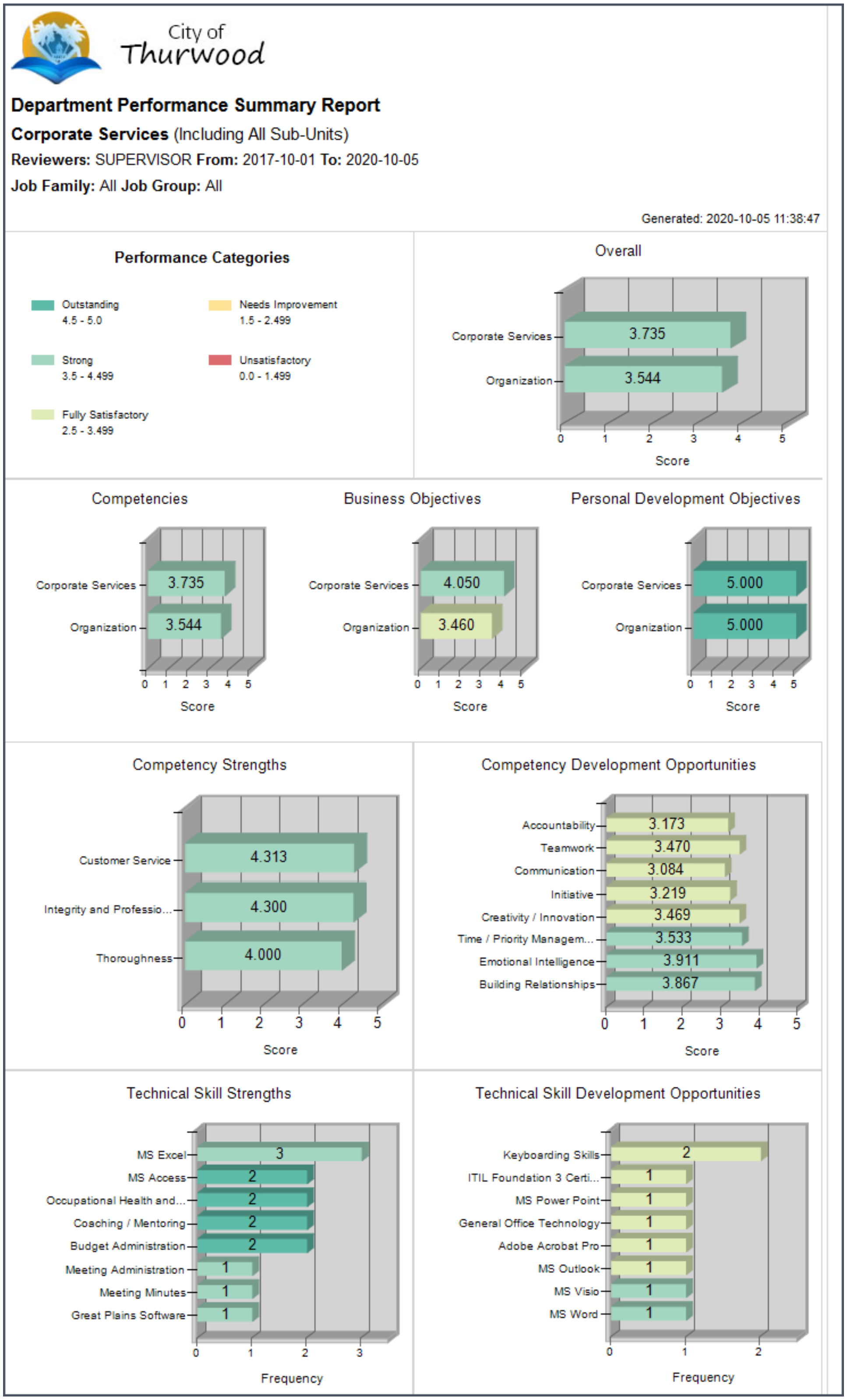
OR



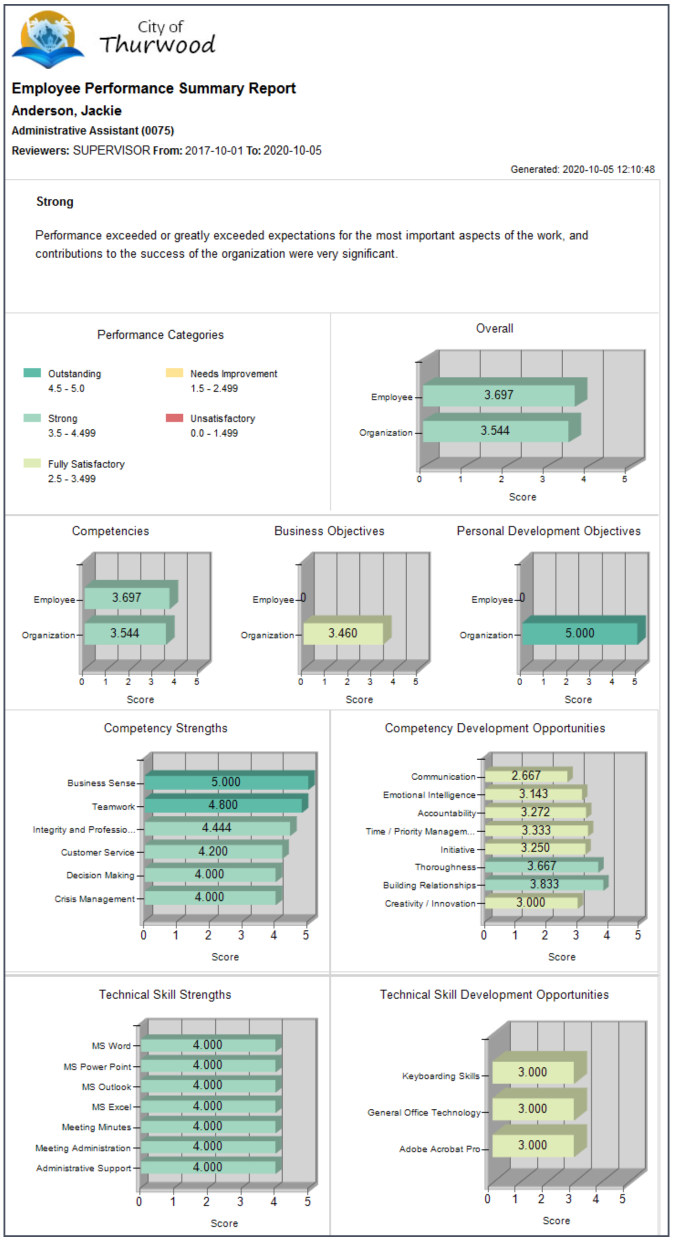
Complete the rest of the filter options displayed to ensure ENCV generated reports will include only the information you want to see.

Based on the filter settings, the 'Organizational Learning and Growth' screen enables you to select specific reports that relate to 1) summarized information about the area of organizational responsibility, or 2) employee-specific information about people who work within the area of organizational responsibility.

‘Organization’ Learning and Growth Dashboard



‘Employee’ Learning and Growth Dashboard

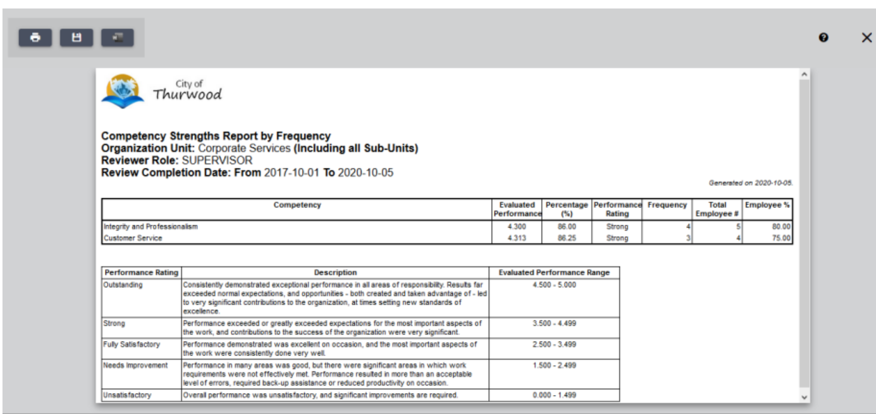


- ‘**Strengths**’ will have already been defined by your organization in ENCV. People with competency learning and growth evaluations at or above that definition will be identified as having a Strength in these reports. Employees with a *strength* in certain Competencies or Skills may be able to offer support or training to others in the organization (mentor matching). Knowing employee strengths will also help determine whether the organization is building up the capacity to support the achievement of short and longer term operational and strategic goals.

- ‘**Development Opportunities’** are competencies that have been identified by ENCV based on the size of the ‘gap’ between each person’s demonstrated learning and growth of the competency **AND** the importance of the competency in each person’s job. Consequently, the order displayed in graphs represents priority ranked competencies for improving individual and team learning and growth. Knowing employee development opportunities helps to focus individual, team and organization-wide training plans. It also enables your organization to measure the impact of training through year over year analysis of competency learning and growth changes – always measured to three decimal places.

Tracking Competency Strengths (Organization / Employee)

‘**Competency/Technical Strengths’** reports provide the names of employees who could be potential ‘mentors’ to others based on the level of learning and growth they have demonstrated in their current work.


City of Thurwood

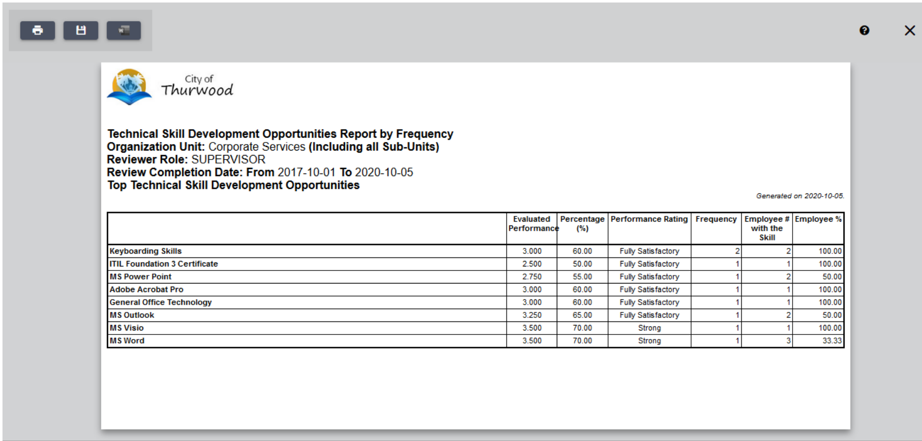
Competency Strengths Report by Frequency
Organization Unit: Corporate Services **(Including all Sub-Units)**
Reviewer Role: SUPERVISOR
Review Completion Date: From 2017-10-01 **To** 2020-10-05

Generated on 2020-10-05.

Competency	Evaluated Performance	Percentage (%)	Performance Rating	Frequency	Total Employee #	Employee %
Integrity and Professionalism	4.300	86.00	Strong	4	5	80.00
Customer Service	4.313	86.25	Strong	3	4	75.00

Performance Rating	Description	Evaluated Performance Range
Outstanding	Consistently demonstrated exceptional performance in all areas of responsibility. Results far exceeded normal expectations, and opportunities - both created and taken advantage of - led to very significant contributions to the organization, at times setting new standards of excellence.	4.500 - 5.000
Strong	Performance exceeded or greatly exceeded expectations for the most important aspects of the work, and contributions to the success of the organization were very significant.	3.500 - 4.499
Fully Satisfactory	Performance demonstrated was excellent on occasion, and the most important aspects of the work were consistently done very well.	2.500 - 3.499
Needs Improvement	Performance in many areas was good, but there were significant areas in which work requirements were not effectively met. Performance resulted in more than an acceptable level of errors, required back-up assistance or reduced productivity on occasion.	1.500 - 2.499
Unsatisfactory	Overall performance was unsatisfactory, and significant improvements are required.	0.000 - 1.499

‘Competency/Technical Development Opportunities’ reports provide details about people in the organization who would benefit from specific training and development opportunities because their learning and growth does not indicate these important competencies/technical skills are a ‘Strength’.



City of Thurwood

Technical Skill Development Opportunities Report by Frequency
Organization Unit: Corporate Services **(Including all Sub-Units)**
Reviewer Role: SUPERVISOR
Review Completion Date: From 2017-10-01 **To** 2020-10-05
Top Technical Skill Development Opportunities

Generated on 2020-10-05.

	Evaluated Performance	Percentage (%)	Performance Rating	Frequency	Employee # with the Skill	Employee %
Keyboarding Skills	3.000	60.00	Fully Satisfactory	2	2	100.00
ITIL Foundation 3 Certificate	2.500	50.00	Fully Satisfactory	1	1	100.00
MS Power Point	2.750	55.00	Fully Satisfactory	1	2	50.00
Adobe Acrobat Pro	3.000	60.00	Fully Satisfactory	1	1	100.00
General Office Technology	3.000	60.00	Fully Satisfactory	1	1	100.00
MS Outlook	3.250	65.00	Fully Satisfactory	1	2	50.00
MS Visio	3.500	70.00	Strong	1	1	100.00
MS Word	3.500	70.00	Strong	1	3	33.33

Succession Planning

51) Succession Planning

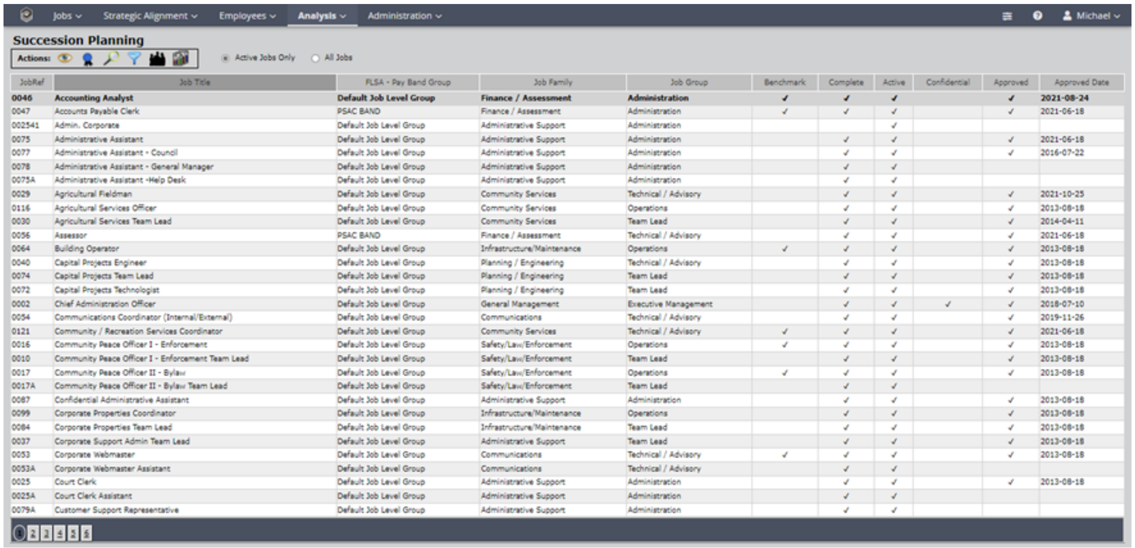
Due to the highly sensitive nature of this information, only Administrators are given access to this module.

This function utilizes learning and growth history (the behaviours, as well as technical skill proficiencies demonstrated) to generate a prioritized list of Employees who could move into a specific job. For employees, this means learning and growth history counts. How Employees develop and demonstrate both job specific and organizationally relevant competencies in their current job will significantly impact their future career opportunities within the organization.

For supervisors, the software identifies and prioritizes the names of the best internal candidates based on competency fit, all in a matter of seconds. It calculates the likely learning and growth of candidates as if they had been in the job last year. It identifies the top developmental needs they will have (based on learning and growth history) if they are assigned the job, enabling developmental training to begin at any time.

For management, Encompassing Visions ensures that the Succession Planning process supports organizational values and the achievement of organizational objectives. It ensures that succession planning decisions reflect both WHAT is needed to be done, and HOW it is expected to be accomplished - today, and in the future.

a. Go to the ‘Analysis’ option in the navigation bar at the top of the screen and select the option ‘Succession Planning’. All jobs in the system are displayed sorted by Job titles.

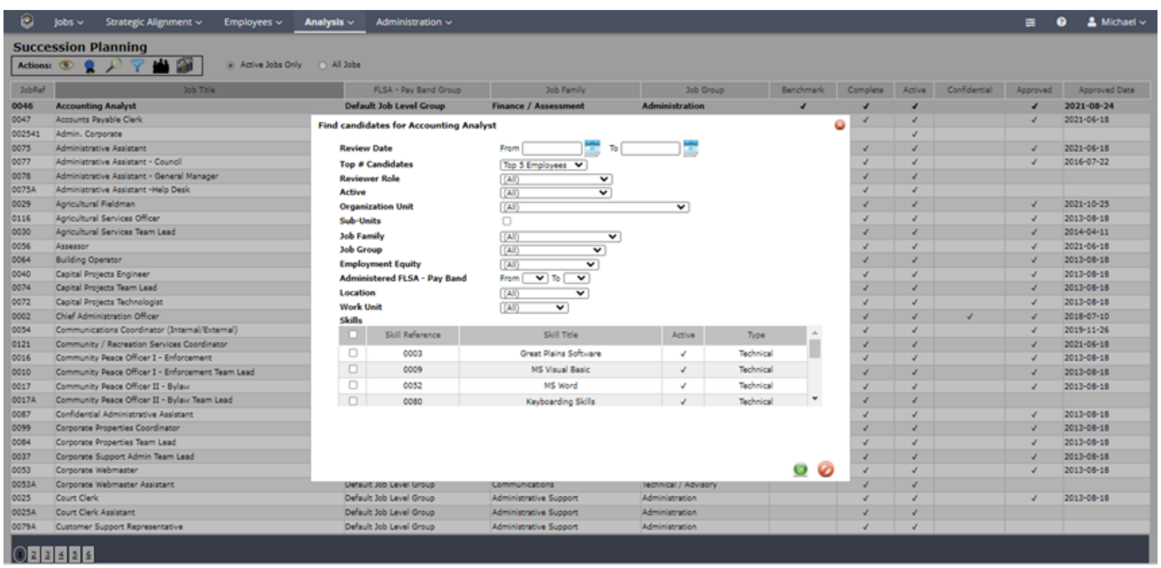


Note: Succession Planning is not available for any job not yet approved.

b. Single click on the title of the Job you would like to query for a candidate.

c. Click the  from the 'Actions' box.

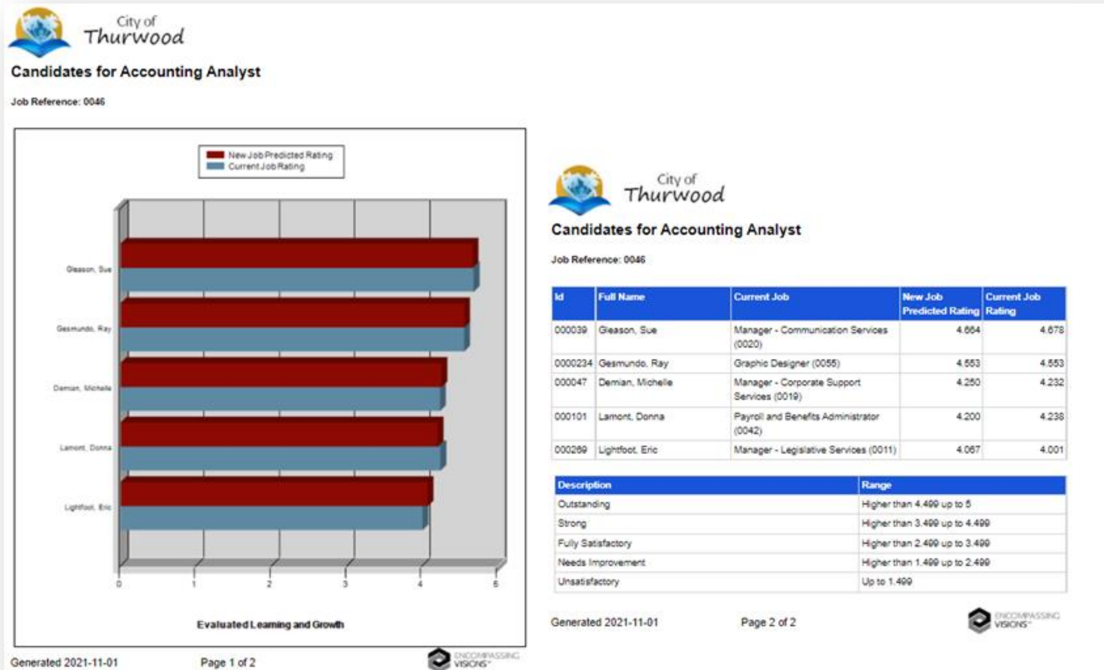
d. The 'Succession Planning Parameters' screen will open.



This screen allows you to choose parameters to make the candidate list as meaningful as possible.

If you choose to include skills, the analysis will look at the skills linked to each Employee's file in ENCV to determine if the Employee has the skills that are required for the job, regardless of whether their current job requires those skills be applied.

e. Click 'OK' to generate the candidates queried for the position.



City of Thurwood

Candidates for Accounting Analyst

Job Reference: 0046

Id	Full Name	Current Job	New Job Predicted Rating	Current Job Rating
000039	Gleason, Sue	Manager - Communication Services (0020)	4.664	4.678
0000234	Gesmundo, Ray	Graphic Designer (0055)	4.553	4.553
000047	Demian, Michelle	Manager - Corporate Support Services (0019)	4.250	4.232
000101	Lamont, Donna	Payroll and Benefits Administrator (0042)	4.200	4.238
000269	Lightfoot, Eric	Manager - Legislative Services (0011)	4.067	4.001

Description	Range
Outstanding	Higher than 4.499 up to 5
Strong	Higher than 3.499 up to 4.499
Fully Satisfactory	Higher than 2.499 up to 3.499
Needs Improvement	Higher than 1.499 up to 2.499
Unsatisfactory	Up to 1.499

Generated 2021-11-01 Page 2 of 2

- The Job being queried is identified at the top of the screen.
- The list of candidates is sorted by New Job Score (descending) so the Employee who is the best fit is at the top of the list.
- The Current Job Score is the Employee's overall evaluation in the current job.
- The New Job Score is how the Employee would score in the new (queried) job after job competencies have been adjusted for relative level of learning and growth (using the Competency importance ratings for the queried job).

Setting up Work Plans

52) Business and Personal Development Objectives

As outlined on Page 28 of this Guide, fully 'encompassing' learning and growth reviews will include analyses of **Business Objectives (BO)** 'accomplished' and **Personal Development Objectives (PDO)** 'achieved'. When integrated with ENCV's job-specific **Competency Reviews**, your organization - and every employee who works within it - will know that individual, team and organizational learning and growth feedback is the most objective, respectful and actionable information possible.

Business Objectives

Every year there may be new or recurring tasks or projects that need to be accomplished. Each important task or project detail is considered a Business Objective in ENCV, and each will have a specific completion date assigned to it (see 'Suggestions for Creating SMART Objectives' on Page 55). Over the course of a Review Period (typically 1 year in duration, and usually associated with the organizations Fiscal cycle) there may be several Business Objectives each person will be expected to accomplish. Whether there is one or several Business Objectives with the same or different Due Dates, all objectives for each person should collectively be included in one '**Business Objective Work Plan**' for the stated Review Period.

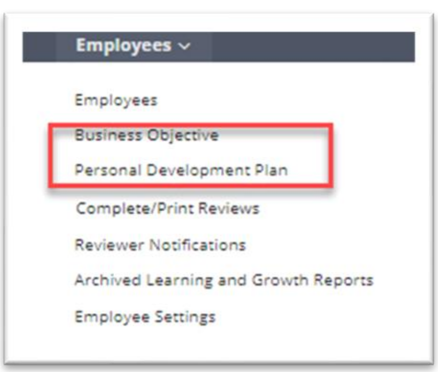
Personal Development Objectives
Every year there may also be one or more specific Personal Development Objective(s) every person on staff will be asked to address. These objectives may be tied to an earlier learning and growth review where development of a specific Competency was identified as something important and beneficial for them to develop. Regardless of the number of personal development objectives a person may have, or when each might be expected to have been developed, they should be collectively included in one '**Personal Development Objective Work Plan**' for the stated Review Period.

Note: "Business Objectives" and "Professional Development Objectives" are terms that can be customized in the system to reflect your organization's terminology. See **Employees>Employee Settings> Alternate Terms >** for more information. If these terms have been customized, every place where "Business Objective" and "Professional Development Objective" is referenced, you will see the alternate term chosen by your Organization.

If they are **NOT** to be part of the Employee Review Process, go to **Employees>Employee Settings> Business Objectives>** and change to 'NO' the option 'Enable Business Objectives'? and go to **Employees>Employee Settings> Professional Development Objectives** and change to 'NO' the option 'Enable Professional Development Objectives?'.

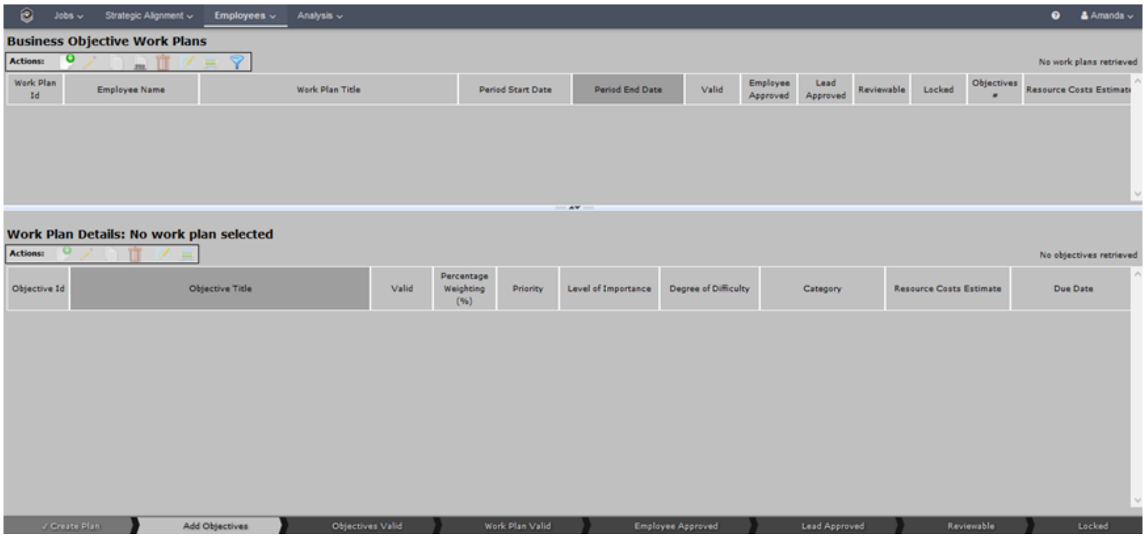
53) Creating A Business Objective Work Plan / Personal Development Objective Work Plan.

1. Scroll over to 'Employees' in the navigation bar to display the related menu options.
2. Select the type of Work Plan you want to set up or view – 'Business Objectives' or 'Personal Development Objectives'.



The system will open the input screen for the type of Work Plan you have selected.

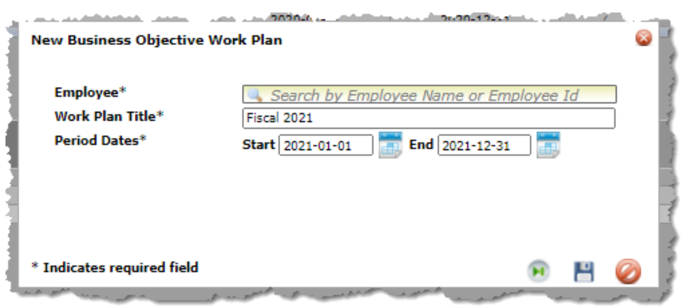
Each Supervisor/Manager will only ever see Work Plans related to themselves and their direct reports. The direct reports will only see work plans for themselves when they log into the system. If there is no detailed information showing under the report headings, that means there are no previous Work Plan(s) to display. As the Administrator, you will see all employee Work Plans created within/across the organization.



54) To Add A Work Plan

a. If you are creating a new Work Plan either for yourself or someone else, click the  icon in the ‘Actions:’ bar at the top left of the screen.

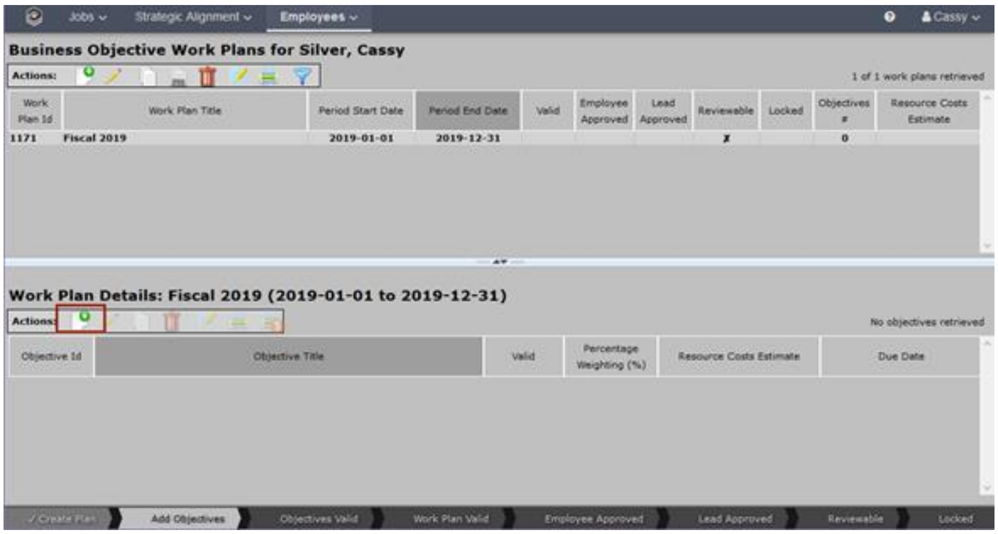
b. In the ‘Employee’ text field, begin to type your name or the name of another employee, and select the correct name when the system prompts it.



You will notice that the ‘Work Plan Title’ field is pre-populated with a "Fiscal Year" label. For consistency and ease of future reference, it is recommended you keep the system suggested Work Plan Title. It can however be changed if you need to. Verify the pre-populated ‘Period Dates’, change as necessary, and then click on the green arrow forward button to proceed with entering the first Objective of the Work Plan.

You will be directed by the software to another input screen where details about the first objective can be entered. After Objective #1 has been entered, click on the green arrow forward button to enter Objective #2, and so on until every objective for the ‘Fiscal year’ has been entered.

Alternatively, for a new Work Plan that has been entered in the top half of the screen, highlight it with a single click of the mouse, then in the bottom half of the screen (i.e., ‘Work Plan Details’) click the ‘Add’ icon in the ‘**Actions:**’ bar.



- Required fields are marked with an asterisk (*).
- You may save the Work Plan at any point, even if all Objectives have not yet been completed. Please note though that you will not be able to approve the Work Plan until all the required details for every Objective have been entered.

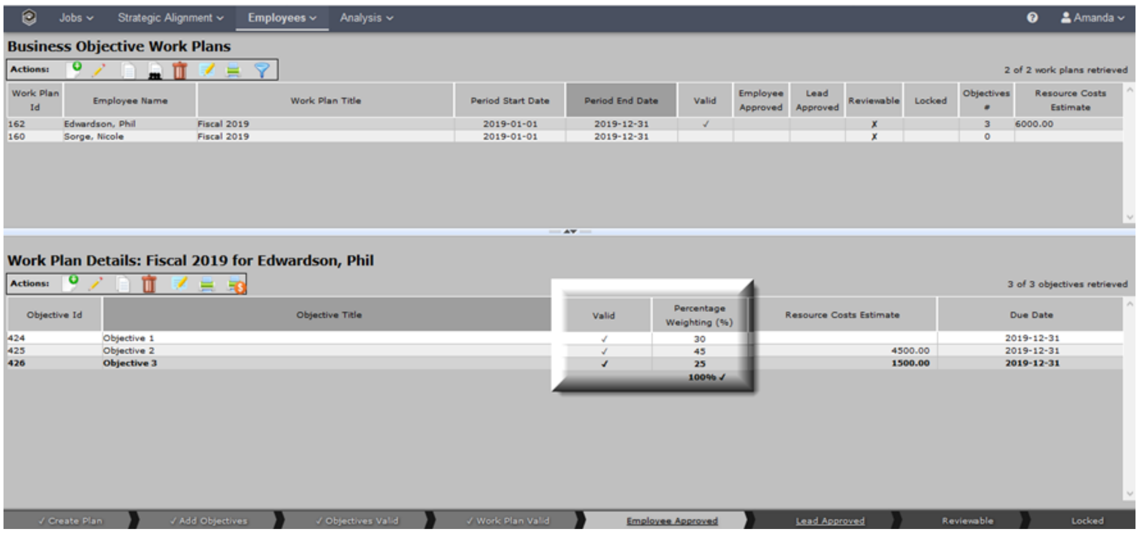
Suggestions for Creating SMART Objectives

Supervisors/Managers and staff must agree on the timing and quality of results tied to each objective, including the general approach required to achieve them, and the resources and support that will be needed to accomplish them.

1. ‘Leads’ should review team objectives and discuss them with their staff.
2. Agree on the most important work-related priorities that each team will focus on in the coming Review Period and ensure a shared understanding of how those work priorities will support the priorities of the Organization.
3. Draft **SMART** objectives for these priorities.
   - **SPECIFIC** (end results are emphasized using action verbs).
   - **MEASURABLE** (It can be determined when the goal is complete).
   - **ACHIEVABLE** (A specific foreseeable end that is within reach.)
   - **REALISTIC** (The situation has been evaluated and the needs to accomplish the goal are known.)
   - **TIMELY** (It is reasonable to start it now and there is a set end date).

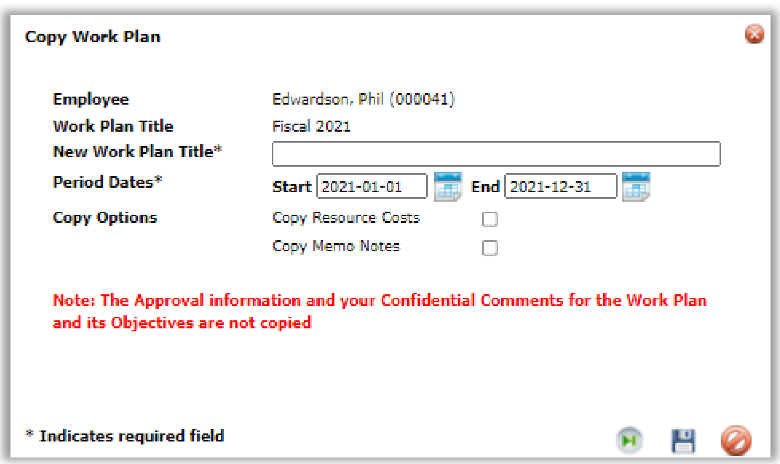
- The Valid column will remain blank until every required field for each listed Objective has been completed and saved. Note: The distributed Percentage Weighting across all Objectives described in the Work Plan must total 100%.

- Regardless of who has created the Work Plan and its specific Objective details, the information should ALWAYS be based on agreement and shared understanding of expectations, deliverables and timelines.



55) Copying a Work Plan (From One Year to The Next)

Some people have Business Objective Work Plans that change very little from one year to the next. If that is the case, you can use ENCV functionality to ‘copy’ a specific Work Plan from the previous year. To copy an ***existing*** Work Plan, start by identifying the persons Work Plan you want to copy, and then single click the mouse on it. Then click the icon in the **‘Actions:’** bar at the top left of the screen.



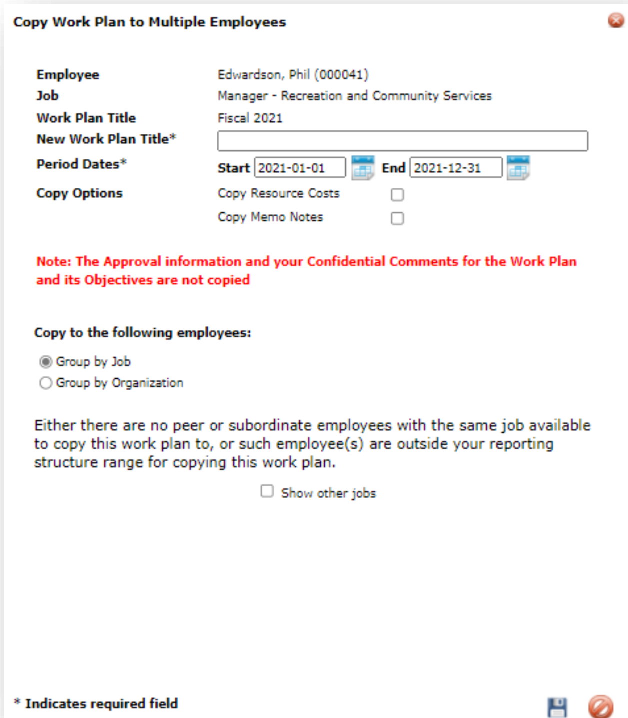
You will notice that the ‘Employee’ field is pre-populated with the selected Employee’s name and a ‘New Work Plan Title’ is requested. Verify the pre-populated ‘Period Dates’, change as necessary, and choose whether you want to also ‘Copy Resources Costs’ and/or ‘Memo Notes’ from the original Work Plan.

Next, click on the green arrow forward button at the bottom of the screen begin reviewing and editing (as necessary) each copied Objective in the ‘new’ Work Plan. **Note:** All ‘**Approvals’** and any ‘**Confidential Comments’** in the original Work Plan are NOT included in the copied version.

56) Copying A Work Plan to Multiple Employees

This functionality is not available to the Administrator. However, we wanted you to be able to see how this works for Supervisors/Managers in case they had any questions.

If the Supervisor/Manager has a number of people reporting to them who do the same job and will have very similar Business Objectives, they first need to create a Work Plan for one of the job incumbents, including expected objectives to be accomplished during the Review Period. To do this, they need to go to Employees in the navigation bar, select the ‘Business Objectives’ option, add/insert a new Business Objective Work Plan, and then enter all the specific objectives needed to be achieved during the Review Period. When the Work Plan is proven ‘Valid’ by ENCV and ‘Approved’ by the employee and the Supervisor/Manager (as their ‘Lead’) they will see that the Employee’s Work Plan is listed in the top section of the screen with the specific related objectives listed at the bottom. If the Business Objective Work Plan is ‘Valid’ and ‘Approved’ by both the Employee and their ‘Lead’, it can be copied to others by single clicking on the Work Plan to be copied, then clicking the  icon in the ‘**Actions:’** bar at the top left of the screen.



They will notice that the ‘Employee’ field is pre-populated with the selected Employee’s name and a ‘New Work Plan Title’ is requested. They will need to verify the pre-populated ‘Period Dates’, change as necessary, and choose whether they want to also ‘Copy Resources Costs’ and/or ‘Memo Notes’ from the original Work Plan.

Next, they should select **‘Group by Job’** to see the names of all other subordinate employees who are attached to the same Job, or **‘Group by Organization’** to see the names of subordinate staff who work as peers of the person you have copied the Work Plan for. By selecting the names they wish to copy the Work Plan to and then clicking the **Save** button at the bottom of the screen, ENCV will distribute a copy of the Work Plan to each of them. ***Please note that each employee receiving the Work Plan will still need to individually approve it, as will the Supervisor/Manager, before it will be reviewable.***

The ENCV ‘rules’ for copying Work Plans are -

- The Supervisor/Manager can copy Work Plans to other employees who directly or indirectly report to them;
- They cannot copy a Work Plan to one of their peers; and,
- They cannot copy a Work Plan to someone at a higher level in the organization than them.

57) Approve the Work Plan

Once the Objective details are proven **Valid** by ENCV, each Work Plan still requires approval by the Supervisor/Manager (as the ‘Lead’) and the employee for whom the

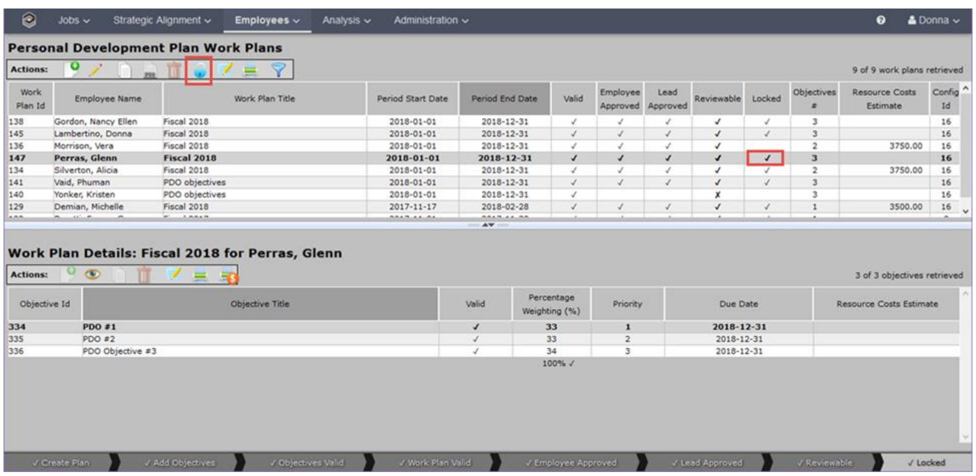
Work Plan was created. **Please note that if a Work Plan is not 'Approved' by both the 'Employee' and their 'Lead' it will not be available for evaluation**.

- On the top half of the screen, **double click** on the Work Plan they want to 'Approve'.
    - Have them tick the ***Lead Approved*** box if they agree with the Work Plan objectives as detailed.
    - Have their direct reports log in and tick the ***Employee Approved*** box if they also agree with the Work Plan objectives as detailed. Direct reports can also approve the Work Plan from the Supervisors/Managers computer monitor if they have their ENCV password (which is required for security purposes).

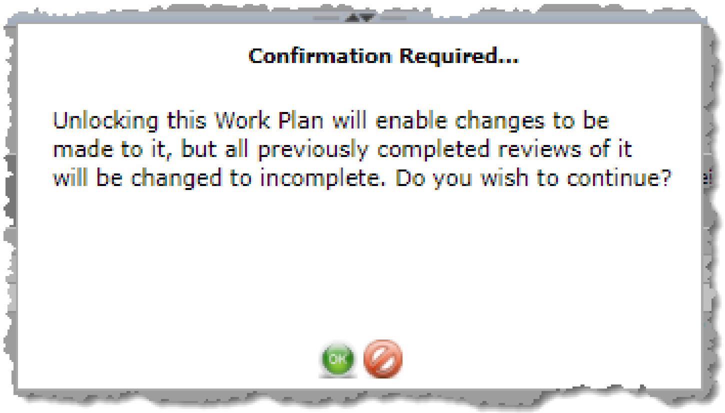
Once the Work Plan is approved, it cannot be edited. Should changes be required, it will first need to be UNAPPROVED by **both** the Supervisor/Manager and their staff member. When the edits have been made to the plan, it must once again be re-approved as outlined above. Unapproving a Work Plan will only be possible if its review has not yet been started.

58) Locked Work Plans

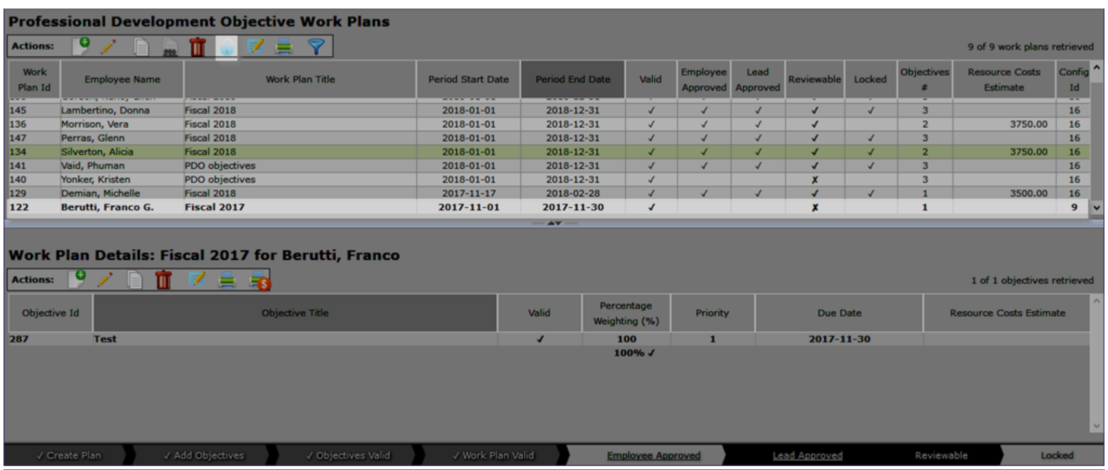
Only Administrative Users can Unlock a work plan once a review is in place. This security is to prevent the work plan from being changed after reviews have already been completed.



1. Select the work plan to be **Unlocked.**
2. Click the Unlock icon in the Actions bar.



3. A confirmation required message will be generated. Click ‘OK’ to continue or ‘Cancel’.
4. The work plan will now appear as incomplete, not approved and not locked. Changes to the Work Plan’s content can now be made.



Note: The review will no longer appear in the ‘Complete/Print Reviews’ list while it remains ‘Unapproved’.

5. Once changes have been made, the work plan should be re-approved by both the Employee and their Supervisor/Manager.
6. The Work Plan will now be reviewable again. Information previously entered will remain intact but should be reviewed to ensure it is still correct, and only new objectives need to be evaluated to complete the review.

59) Evaluating Work Plans

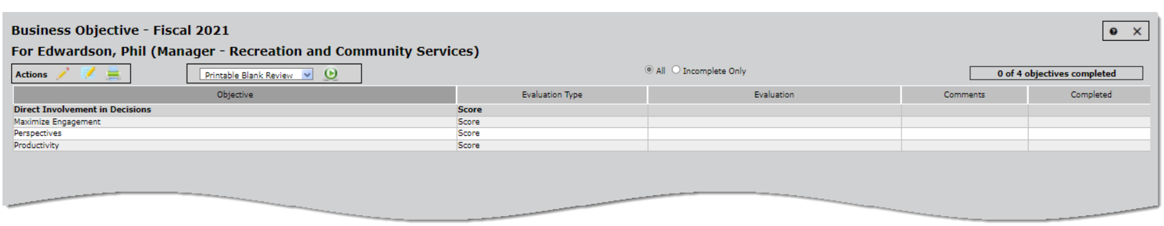
For most people first logging into ENCV, the software should take them directly to the ‘Complete/Print Reviews’ module. (If it doesn’t, contact us at ENCV to help you reset your organizations Profile settings!) To complete a Work Plan review, users can also go to the ‘**Employees**’ heading in the navigation bar at the top of the screen, and select the option labelled ‘**Complete/Print Reviews**’.

a. Employee's will only see their name on that list and will be asked to do an 'INCUMBENT' review. If they have been previously asked to do a learning and growth review of someone else, they will also see that person's name on the list, and the relationship they have to them potentially defined as either 'PEER', 'CLIENT' or 'SUBORDINATE'.

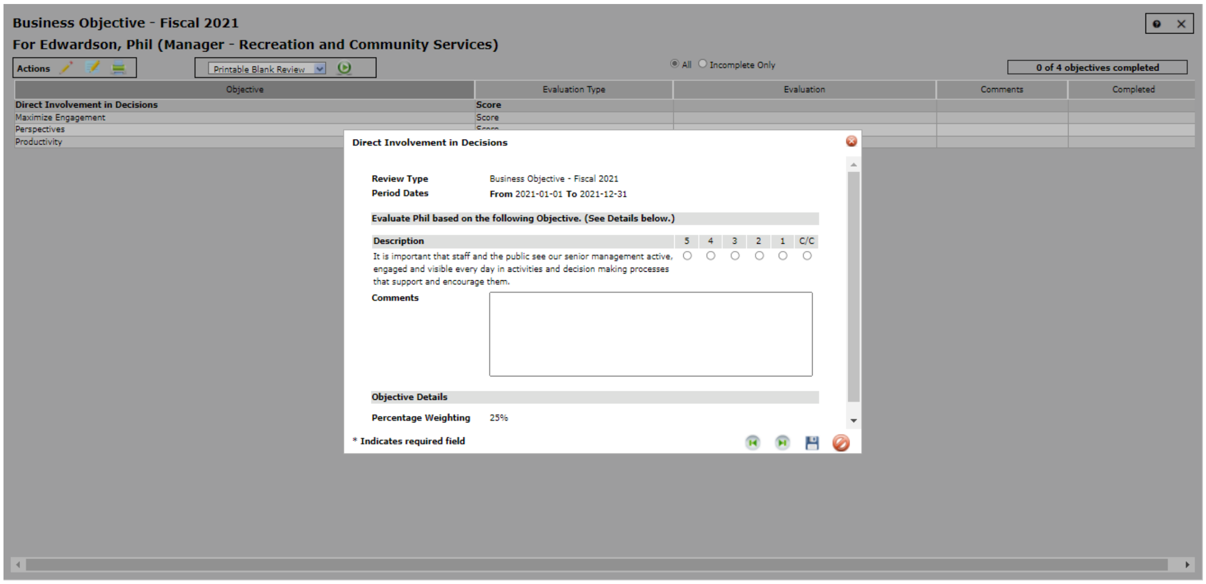
b. For the Supervisor/Manager, they will see their name on that list as well as the names of all their direct reports. They will be asked to do an 'INCUMBENT' review for themselves, and a 'SUPERVISOR' review for their staff. If they have been previously asked to do a learning and growth review of someone who is not on their team, they will also see that person's name on the list, and their relationship to them potentially defined as either 'PEER', 'CLIENT' or 'SUBORDINATE'.

c. Double click on the BO or PDO to be reviewed.

Note: As previously described with 'Competency Reviews', the Supervisor/Manager will be prompted by the software with an option to copy the completed BO or PDO self-assessment of their direct report (i.e., their 'INCUMBENT' review). If they select the option to do so, all responses and comments will be copied into what will then become their 'SUPERVISOR' review. If the direct report has not yet completed their Work Plan self-assessment, it will not be available for copying. By default, this copy Work Plan option will be enabled for Supervisors/Managers. If your organization does not require/desire the 'copy INCUMBENT Review' Policy, it can be disabled by going to Employees in the navigation bar, then choosing Employee Settings>Reviews>***'Do you want to allow supervisors to copy their employees incumbent review?'*** and changing the Policy value to 'No'.

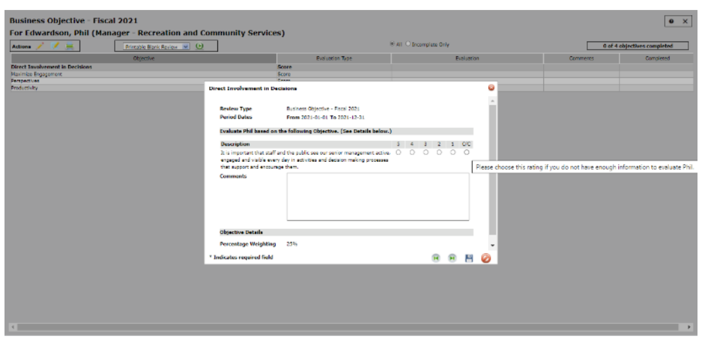


- Double click on the specific Objective to be reviewed, completed and/or commented on:



d. Using the scroll bar down the right side of the screen, make sure the ***full*** description of the specific objective's details and deliverables are read.

If it is determined that a specific objective should not or could not have been evaluated during the review period (e.g., it is no longer applicable, required resources to accomplish it were not available, there was a change in priorities, etc.) the objective should be marked as 'C/C' (i.e., 'Cannot Comment'). Ensure the Comments section is completed with information about why the objective could not or should not be evaluated at this time.



- Scroll over the evaluation rating buttons (**1-5** or **1-10**) to display rating definitions. Select the one that is most appropriate.
- After selecting the evaluation rating and providing supporting comments, use the green arrow forward button at the bottom of the screen to move to the next objective.
- Once all objectives have been evaluated and commented on, click  to 'Save' the input and close the Objective list details screen. They will be returned to the Complete/Print Reviews screen, and the Review List screen should now be updated to display the status of the review.

Reports

60) Aggregate Reports

Available in Encompassing Visions, these graphical and analytical reports effectively communicate and track learning and growth details at an individual contributor, team and organization-wide level. Reporting on job–specific behavioural and technical skills demonstrated, business objectives accomplished, and professional development goals achieved, the software provides both detailed and summarized information about who is doing what, how well, at what cost, and to what benefit.

Many of these aggregate reports are found in their related module, specifically in the **Actions > Generate Related Reports** area.

Under the sub-heading 'Organizational Learning and Growth' of the Analysis module, much of the detailed information about people and team learning and growth is available for analytical comparisons over time within the Learning and Growth Reviews Summary Reports.

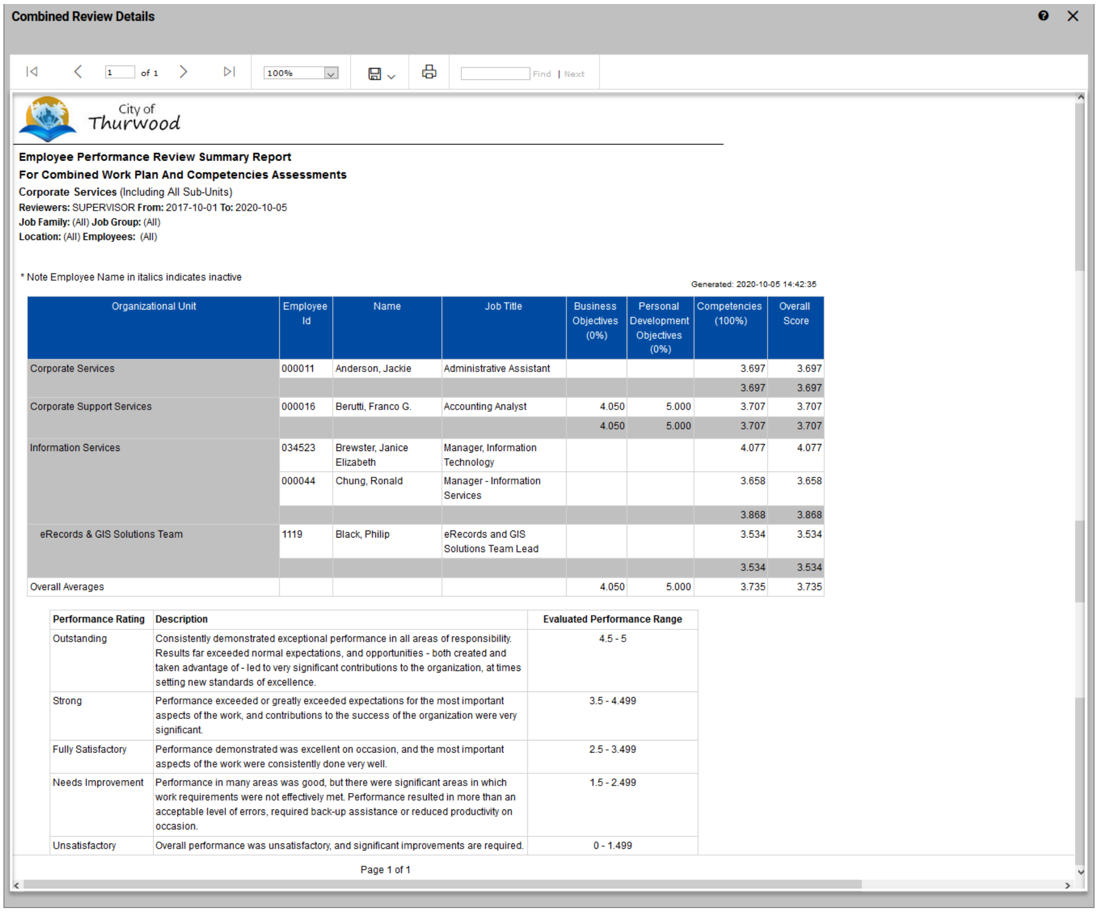
Within this same sub-heading, information about the financial costs ($'s) related to specific business objectives can be tracked for organizational budgeting purposes.

1. Go to the 'Analysis' option in the navigation bar at the top of the screen and select the option 'Organizational Learning and Growth'.

61) Employee Learning and Growth Review Summary Report

The Employee Learning and Growth Review Summary Report gives a listing of the overall Learning and Growth Evaluation, as calculated in the Learning and Growth Report, for each of the selected Employees. There are three views for generating this report:

- Work Plan Assessments
- Competency Assessments
- Combined Work Plan and Competency Assessments


Combined Review Details

City of Thurwood

Employee Performance Review Summary Report
For Combined Work Plan And Competencies Assessments
Corporate Services (Including All Sub-Units)
Reviewers: SUPERVISOR **From:** 2017-10-01 **To:** 2020-10-05
Job Family: (All) **Job Group:** (All)
Location: (All) **Employees:** (All)

* Note Employee Name in italics indicates inactive

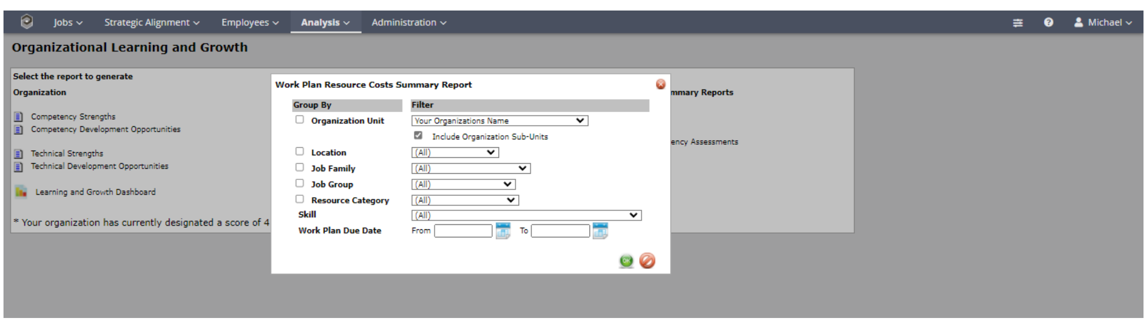
Generated: 2020-10-05 14:42:35

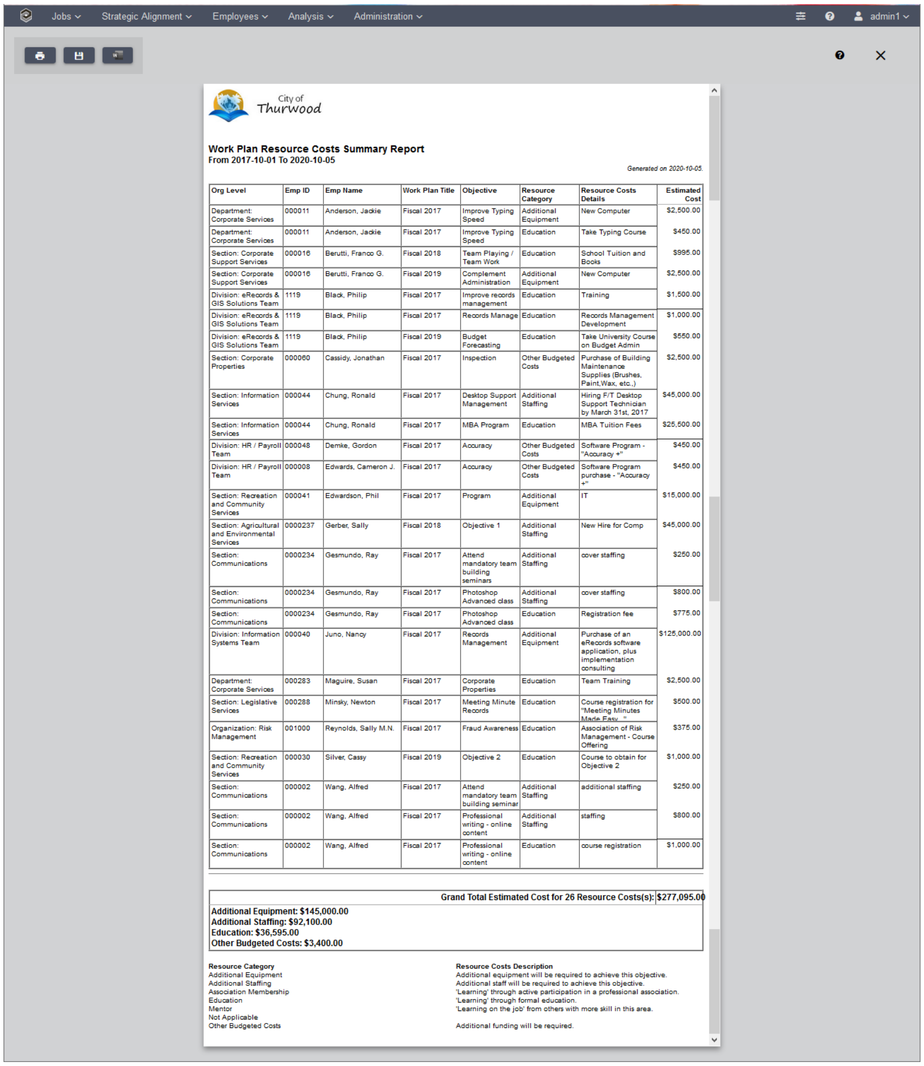
Organizational Unit	Employee Id	Name	Job Title	Business Objectives (0%)	Personal Development Objectives (0%)	Competencies (100%)	Overall Score
Corporate Services	000011	Anderson, Jackie	Administrative Assistant			3.697	3.697
						3.697	3.697
Corporate Support Services	000016	Berutti, Franco G.	Accounting Analyst	4.050	5.000	3.707	3.707
				4.050	5.000	3.707	3.707
Information Services	034523	Brewster, Janice Elizabeth	Manager, Information Technology			4.077	4.077
	000044	Chung, Ronald	Manager - Information Services			3.658	3.658
						3.868	3.868
eRecords & GIS Solutions Team	1119	Black, Philip	eRecords and GIS Solutions Team Lead			3.534	3.534
						3.534	3.534
Overall Averages				4.050	5.000	3.735	3.735

Performance Rating	Description	Evaluated Performance Range
Outstanding	Consistently demonstrated exceptional performance in all areas of responsibility. Results far exceeded normal expectations, and opportunities - both created and taken advantage of - led to very significant contributions to the organization, at times setting new standards of excellence.	4.5 - 5
Strong	Performance exceeded or greatly exceeded expectations for the most important aspects of the work, and contributions to the success of the organization were very significant.	3.5 - 4.499
Fully Satisfactory	Performance demonstrated was excellent on occasion, and the most important aspects of the work were consistently done very well.	2.5 - 3.499
Needs Improvement	Performance in many areas was good, but there were significant areas in which work requirements were not effectively met. Performance resulted in more than an acceptable level of errors, required back-up assistance or reduced productivity on occasion.	1.5 - 2.499
Unsatisfactory	Overall performance was unsatisfactory, and significant improvements are required.	0 - 1.499

Page 1 of 1

62) Work Plan Resource Costs Summary Report





City of Thurwood

Work Plan Resource Costs Summary Report
From 2017-10-01 To 2020-10-05

Generated on 2020-10-05.

Org Level	Emp ID	Emp Name	Work Plan Title	Objective	Resource Category	Resource Costs Details	Estimated Cost
Department: Corporate Services	000011	Anderson, Jackie	Fiscal 2017	Improve Typing Speed	Additional Equipment	New Computer	$2,500.00
Department: Corporate Services	000011	Anderson, Jackie	Fiscal 2017	Improve Typing Speed	Education	Take Typing Course	$450.00
Section: Corporate Support Services	000016	Berutti, Franco G.	Fiscal 2018	Team Playing / Team Work	Education	School Tuition and Books	$995.00
Section: Corporate Support Services	000016	Berutti, Franco G.	Fiscal 2019	Complement Administration	Additional Equipment	New Computer	$2,500.00
Division: eRecords & GIS Solutions Team	1119	Black, Philip	Fiscal 2017	Improve records management	Education	Training	$1,500.00
Division: eRecords & GIS Solutions Team	1119	Black, Philip	Fiscal 2017	Records Manage	Education	Records Management Development	$1,000.00
Division: eRecords & GIS Solutions Team	1119	Black, Philip	Fiscal 2019	Budget Forecasting	Education	Take University Course on Budget Admin	$550.00
Section: Corporate Properties	000060	Cassidy, Jonathan	Fiscal 2017	Inspection	Other Budgeted Costs	Purchase of Building Maintenance Supplies (Brushes, Paint,Wax, etc.,)	$2,500.00
Section: Information Services	000044	Chung, Ronald	Fiscal 2017	Desktop Support Management	Additional Staffing	Hiring F/T Desktop Support Technician by March 31st, 2017	$45,000.00
Section: Information Services	000044	Chung, Ronald	Fiscal 2017	MBA Program	Education	MBA Tuition Fees	$25,500.00
Division: HR / Payroll Team	000048	Demke, Gordon	Fiscal 2017	Accuracy	Other Budgeted Costs	Software Program - "Accuracy +"	$450.00
Division: HR / Payroll Team	000008	Edwards, Cameron J.	Fiscal 2017	Accuracy	Other Budgeted Costs	Software Program purchase - "Accuracy +"	$450.00
Section: Recreation and Community Services	000041	Edwardson, Phil	Fiscal 2017	Program	Additional Equipment	IT	$15,000.00
Section: Agricultural and Environmental Services	0000237	Gerber, Sally	Fiscal 2018	Objective 1	Additional Staffing	New Hire for Comp	$45,000.00
Section: Communications	0000234	Gesmundo, Ray	Fiscal 2017	Attend mandatory team building seminars	Additional Staffing	cover staffing	$250.00
Section: Communications	0000234	Gesmundo, Ray	Fiscal 2017	Photoshop Advanced class	Additional Staffing	cover staffing	$800.00
Section: Communications	0000234	Gesmundo, Ray	Fiscal 2017	Photoshop Advanced class	Education	Registration fee	$775.00
Division: Information Systems Team	000040	Juno, Nancy	Fiscal 2017	Records Management	Additional Equipment	Purchase of an eRecords software application, plus implementation consulting	$125,000.00
Department: Corporate Services	000283	Maguire, Susan	Fiscal 2017	Corporate Properties	Education	Team Training	$2,500.00
Section: Legislative Services	000288	Minsky, Newton	Fiscal 2017	Meeting Minute Records	Education	Course registration for "Meeting Minutes Made Easy..."	$500.00
Organization: Risk Management	001000	Reynolds, Sally M.N.	Fiscal 2017	Fraud Awareness	Education	Association of Risk Management - Course Offering	$375.00
Section: Recreation and Community Services	000030	Silver, Cassy	Fiscal 2019	Objective 2	Education	Course to obtain for Objective 2	$1,000.00
Section: Communications	000002	Wang, Alfred	Fiscal 2017	Attend mandatory team building seminar	Additional Staffing	additional staffing	$250.00
Section: Communications	000002	Wang, Alfred	Fiscal 2017	Professional writing - online content	Additional Staffing	staffing	$800.00
Section: Communications	000002	Wang, Alfred	Fiscal 2017	Professional writing - online content	Education	course registration	$1,000.00

Grand Total Estimated Cost for 26 Resource Costs(s): $277,095.00

Additional Equipment: $145,000.00
Additional Staffing: $92,100.00
Education: $36,595.00
Other Budgeted Costs: $3,400.00

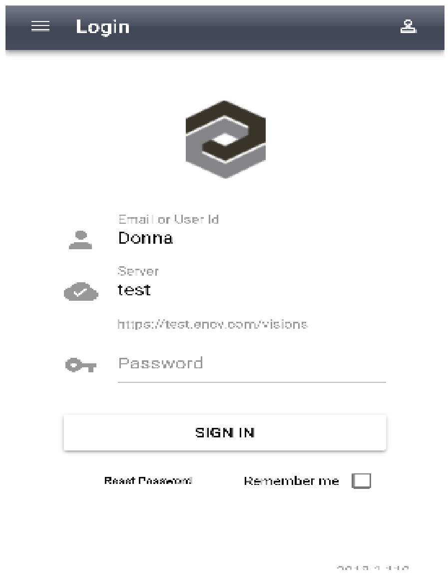
Resource Category	Resource Costs Description
Additional Equipment	Additional equipment will be required to achieve this objective.
Additional Staffing	Additional staff will be required to achieve this objective.
Association Membership	'Learning' through active participation in a professional association.
Education	'Learning' through formal education.
Mentor	'Learning on the job' from others with more skill in this area.
Not Applicable	
Other Budgeted Costs	Additional funding will be required.

63) Completing Reviews with the Mobile App

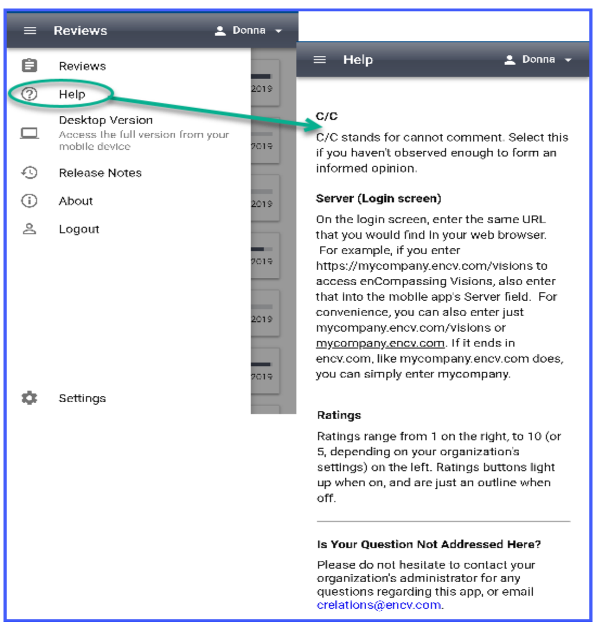
As mentioned earlier, to facilitate the process of completing Learning and Growth Reviews, ENCV is now available as a Mobile App on your Android/iOS cell phone or tablet. The new app is available from https://app.encv.com and with the latest version of Encompassing Visions.

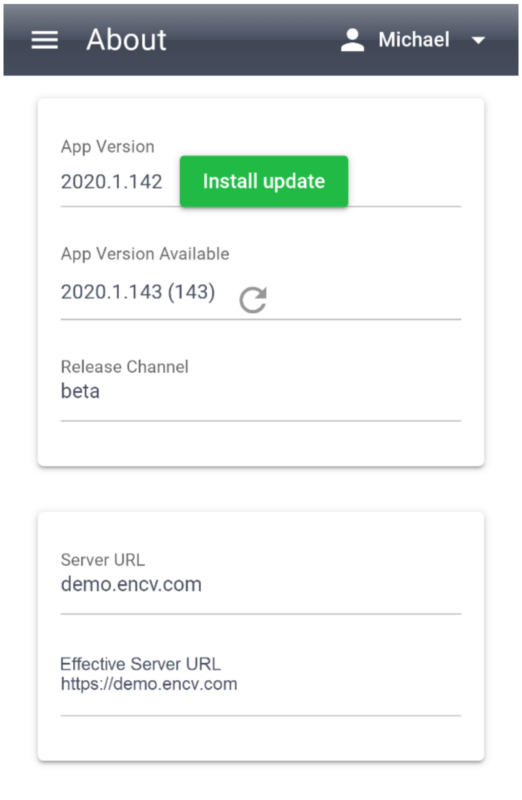
The main menu of the app allows the user to:

- Login,
- See Server connection,
- Open the fundamentals  of the app,
- Reset their password,
- Enable the 'Remember Me' function of the application.
- Version of the app



The mobile app has the same functionality and feel as what the Supervisor/Manager and the Employees will see on their desktop. The screen will open up the following content. Click on one of the titles (icons) to open up each of the descriptions.



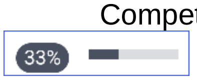


Complete Reviews

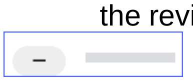
By default, an incumbent and their Supervisor/Manager will be set up to do these reviews. These defaults, and the terms used to define these review types, may have been altered to match procedures and terminology within your organization. The Review List screen lists all of the reviews that the Reviewer is required to complete. By default, the list is sorted so that the reviews most urgently requiring their attention - the incomplete reviews and the reviews with the earliest due date - are at the top of the list. Also, by default, the list displays reviews that are for the Current Review Period being completed by your organization.

Entering the App

- When entering the mobile app, the user will see the following on their Review screen:
- Reviews that need to be completed,
  - A Progress Bar along with a percentage indicator identifies how many Competencies have been reviewed so far.



- Reviews that are not started,
  - A line through the percentage indicator and a gray progress bar indicates the review is **Not Started**.



- Reviews that are in progress,
  - The percentage indicator marked 0% and gray progress bar indicates the review is In Progress.

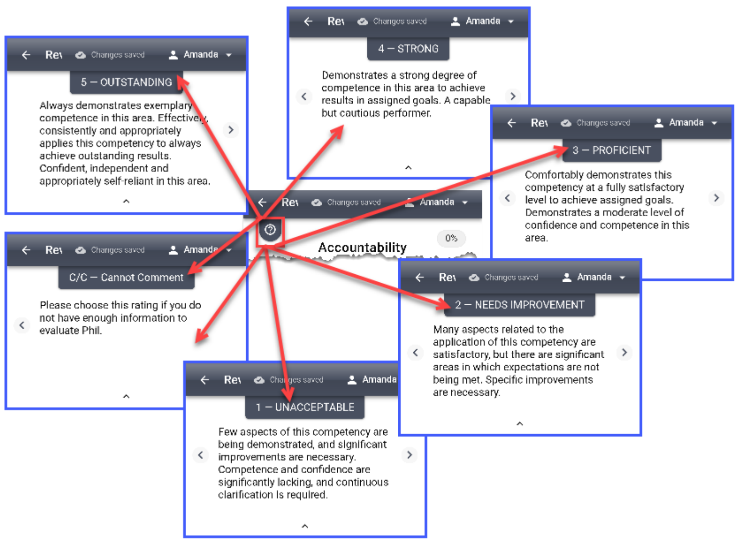
- Reviews that are completed.
  - A check mark and a dark gray progress bar indicates the review is Completed.

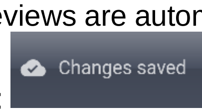
The Review Process is the same as completing on desktop. However, the Supervisor/Manager is not able to copy an ‘Incumbent’ review and save it as a ‘Supervisor’ review at this time.

Tooltips for Response Options

The tooltips for the response options are located in the Help icon (below the navigation bar).

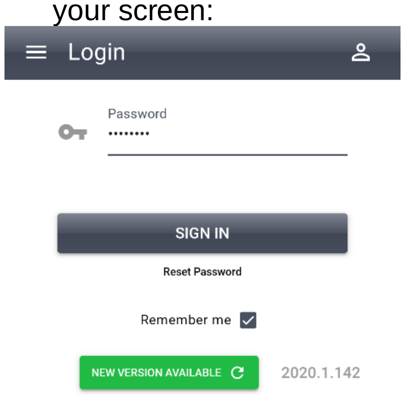
- Click the  to open the tooltips.



Note: All reviews are automatically saved to your server. This is indicated by the following:  located on the navigation bar.

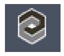
Mobile App Updates

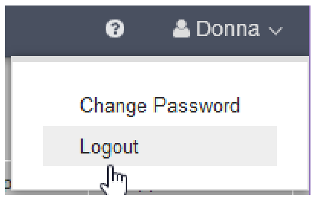
If a new version is available, there should be a green button at the bottom of your screen:



- Clicking the “New Version Available” button reloads the app, which should update it to the latest version.
- Similar functionality has been added to the About screen.

64) How to Navigate

Return to main menu: 

Exit out of system: 

Move from page to page: 

65) Why Encompassing Visions?...

ENCV is based on the principles of **Objectivity, Accountability** and **Respect.**

- Learning and Growth reviews and ratings are more **Objective** because they are *always* based on what a person is specifically paid to do - nothing more, nothing less.

- The process ensures **Accountability** because expectations and learning and growth measures can be clearly communicated before the year even begins, they don’t change unless the job does, and every aspect of what a learning and growth review should include – *what* was accomplished, and *how* it was done – are measured.

- Employee recognition programs and training / development plans demonstrate **Respect** to each person on your team because they are always based on an accurate and objective understanding of how each person’s contributions made a specific difference to individual, team and organizational success; and,

- Succession and career planning decisions are always based on the most accurate and objective information available about people and their capabilities – not who a person knows, but what a person has proven they can do.

Configuring the software

Our software is designed to be fully configurable to meet your organizations needs. Behavior-based and table driven, all competency-related information in ENCV (i.e., competency names, definitions, interview questions, learning and growth evaluation questions, tooltips, elaborations, and system generated suggestions for learning and growth improvement) is easily configured to meet each organizations unique needs, right down to the job-specific level if necessary.

ENCV enables an organization to configure interface features, field names, access security, dashboard/ learning and growth report content, and system standard terminology to a very detailed and need-driven perspective.

The software comes complete with a technical skills library which can be easily updated as required.

The learning and growth management options of Competencies, Business Objectives and Personal Development Plans can be implemented in stages based on organizational ‘readiness’ for each measure. Furthermore, organizations can determine how much each option will be worth in the overall determination of learning and growth ratings by allocating a % value to each.

Based on policy settings and organizational reporting relationships, ENCV automatically controls access to creating and approving objectives, reviewing employee learning and growth, and generating/approving/electronically archiving learning and growth reports.

ENCV enables the import of data from other applications to reduce the amount of data entry required by the Administrator. This exercise can be done early in the implementation process to create the organizational structure and setup reference file tables, employee and user information. The Manual Import can be used to do infrequent or initial importing of information, but for regular synchronization with other applications the Automated Import Service is available.

There is a complete, thorough and up-to-date online ‘HELP’ that describes all system modules and functionalities in a simple, easy to read format. Sections of the ‘HELP’ can be extracted and printed for internal training purposes if needed.

ENCV is both scalable and flexible based on client requirements. The data backend can be housed on a separate SQL server and accessed via the application on multiple servers if required. As the application is using Microsoft Windows Server and Microsoft SQL Server, the scalability is only limited by the hardware and network architecture.

And last but certainly not least, all configuration changes made by an organization are automatically migrated into new version releases of ENCV. With our software, the only time an organization needs to revisit past customizations is when there is a business need to do so.

APPENDIX 1 - SYSTEM REQUIREMENTS

Platform
Encompassing Visions can be installed on-premises or cloud-hosted as a SaaS application using Microsoft Azure. It is a three-tier application with the presentation layer being the Internet browser, the middle tier residing on the Internet Information Server of Windows Server, and the data residing in a Microsoft SQL Server database.

System Installation
The installation of the software is completely self-contained in an InstallShield setup. No other installation is required other than preparation of the server hardware with the appropriate operating systems and SQL Server. Software installation assistance and consulting are available during JPS business hours of 8:00am to 4:30pm MST and all technical support issues are automatically escalated to the Manager of Technical Support Services. Software upgrades during the first year following installation are also provided at no additional cost.

Connection Requirements
When installed on-premises, Encompassing Visions operates within a local area network or a high-speed wide area network. Using HTTPS to encrypt communications is recommended. When cloud-hosted, we force all internet traffic over HTTPS to ensure all data is encrypted in transit.

Storage Capacity
Data storage capacity within Encompassing Visions is limited only by the capabilities of the SQL Server database. The application programs, pages and on-line Help screens occupy about 450 megabytes of disk space on the IIS server.

Support / IT Infrastructure

ENCV would be hosted on a server controlled and managed by the client or by our cloud subscription.

Windows Server	Windows Server 2019	IIS 10	(ISAPI, URL Rewrite 2.1, .NET Framework 4.8)
	Windows Server 2016	IIS 10	(ISAPI, URL Rewrite 2.1, .NET Framework 4.8)
	Windows Server 2012 R2	IIS 8	(ISAPI, URL Rewrite 2.1, .NET Framework 4.8)

***Note: For your security, we recommend configuring ENCV to be accessed via HTTPS*
As of October 10, 2023, Windows Server 2012 R2 will no longer be officially supported by Microsoft or Encompassing Visions.

Database	SQL Server 2019
	SQL Server 2017
	SQL Server 2016
	SQL Server 2014

**Note: Encompassing Visions installation can be configured to allow a separate Database Server.
All combinations of Windows Server and SQL Server are supported.

Windows Client	Windows 10
	Windows 11

Windows Client Browser	Firefox 110 or later
	Chrome 110 or later
	Edge 109 or later

Mac Client Browser	Firefox 110 or later
	Chrome 110 or later
	Safari (currently not supported with this version)

APPENDIX 2 - SYSTEM AUDIT CHECKLIST

Constraints

Do you have ENCV Authorization Codes for 'Jobs' and 'Employees' to do what you need to do?

Policies

- Is the date for the start of your fiscal year correct?
- Do you want to have passwords expire?
- Do you have your organizational logo and branding color selected for reports?
- Do you have an appropriate scrolling message on the main page?
- Are your alternate terms set appropriately based on terms your organization uses?
- Do you use enhanced averaging for Questions 6.0, 7.0, 12.0 and 13.0 in the Questionnaire?
- Are you going to require the jobs be approved before they can be linked to an employee (Job Approval Process Policy)?
- Are you using 5 or 10 response options in the sub-review questions of the learning and growth review? And set the policy appropriately?
- Do you use Employee/Supervisor Relationships for reviews?
- Do you use evaluation options other than Score (i.e. Grade/Percentage/Achieved) in work plan reviews?
- Have you set your Competency Characteristic Threshold appropriately for the Importance Rating at which you want sub-review questions to appear?
- Have you turned on the Work Plans if you are using them? And customized the terms associated with Work Plans?
- Are you using the Copy of Incumbent Reviews by the Supervisor?
- Have your IT department enabled e-Mail messaging from the application? Have you set the policy to indicate that?

Users

- Do all users have the correct security profile?
- Are the usernames consistent?
- Have you changed the password on your default administrator accounts (Admin1, Admin2, Admin3)?

Customizations

- Has your Job Questionnaire been customized, either in wording or in weights?
- Have your competencies been customized, either by inactivating some competencies, changing the wording, or by re-mapping the Job Questionnaire/Competency relationships?

- Have you customized Report Options for recruitment reports and for learning and growth reports?
- Have you customized the learning and growth rating descriptions to suit your organization? Do the Characteristic Tool Tips match?
- Have you established your reference file information? (Job Group, Job Level,etc.)

Organization Structure

- Have you got your Organization Structure established in a manner that supports your Learning and Growth Reviews?
- Are all your Organizational 'leads' correctly identified?

Skills

- Are you identifying skills for each job? Have you built your skills inventory? Are they specific enough to differentiate one job from another?
- Have you turned on the policies that allow you to perform analysis of these skill evaluations from the learning and growth review (in the Organizational Learning and Growth function)?
- Have you linked the skills to the jobs?
- Have you linked the skills to employees so that you can search by skills for candidates in succession planning?

Employees

- Are employees attached to their correct User Id?
- Are employees attached to the correct job?
- Are the correct employees listed as active versus inactive?

Jobs

- Have you checked that there is only one evaluation per job currently in the system?
- Have you differentiated your jobs well enough, so that the job evaluation for a specific job will provide appropriate learning and growth review questions? (i.e.: ensure that your jobs are not too generic)
- Have the jobs been "Approved."?

Measuring Learning and Growth

- Have you decided who is going to perform reviews in your organization? Supervisors? Self-Reviews? Have you set the policies for default reviewers accordingly?

ADVANCED

- Have you reviewed the Competency Learning and Growth review questions, suggestions for development, and interview questions based on your organization's unique Job Groups?

APPENDIX 3 – REPORTS

Jobs Module

Job Data Verification

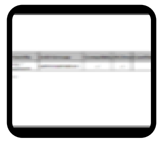
Questionnaire Responses

Job Questionnaire Cross Reference

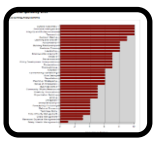
Selection Rationale

Job Audit Listing

Job Totals



Linked Jobs



Job Competencies

Linked Employees

Job Questionnaire Response Validation Results

Staff and Management Communication

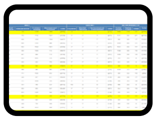
Job Description

Interview Guide

Job Posting

Blank Job Questionnaire

Evaluations and Analyses



Job Total Points Listing

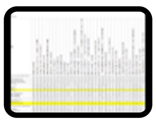
Job Skills Listing – Current Filters

Job Questionnaire Cross Reference

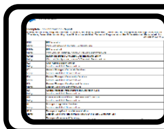
Jobs Audit

Job/Points Matrix

User Assigned Jobs



Job Competency Cross Reference

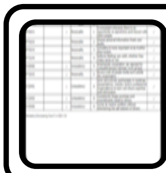


Incomplete Job Information

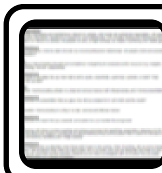
Job Settings

Competency Listing

Describing Learning & Growth Excellence



Characteristic Listing

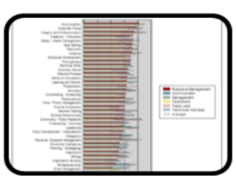


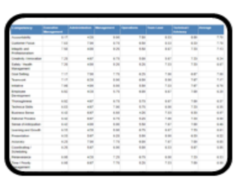
Interview Questions

Competency Characteristics

Skill Listing

Strategic Alignment Module





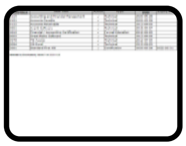
Competency Alignment Summary

Employees Module

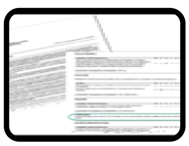
Reports

Employee Learning and Growth Report

Employee Audit Report



Employee Skills & Certification



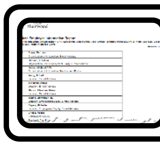
Reviews for Subordinates for their Direct Reports (Review-To-Date)

Business Objective Report

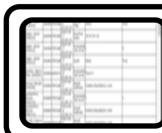
Personal Development Plan Report

Employee Data Verification

Skills Expiry



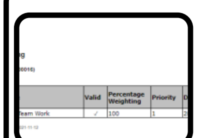
Incomplete Information



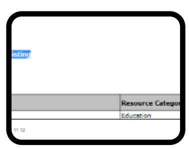
Employees Audit Report

Print Review-to-Date

Print Blank Review



Work Plan Objective Listing

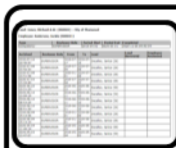


Objective Resource Costs Listing

[Employee Reviewer Notifications]

[Archived Report - Summary]

[Email Log]

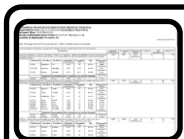


Archived Report - Details

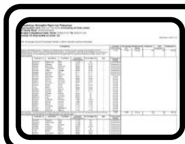
Analysis Module

Organizational Learning and Growth

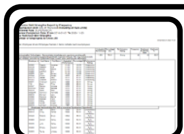
Organization



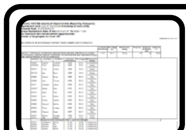
[Competency Strengths]



[Competency Development Opportunities]



[Technical Strengths]



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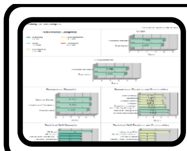
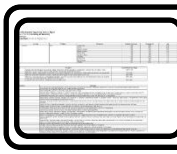


[Learning and Growth Dashboard]

Employee

[Competency Strengths]



[Competency Development Opportunities]

[Technical Strengths]

[Technical Development Opportunities]

[Learning and Growth Dashboard]

Learning and Growth Review Summary Reports

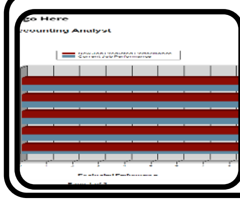
Work Plan Assessments

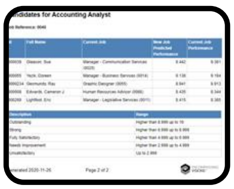
Competency Assessments

Combined Work Plan & Competency Assessments

Work Plan Resource Summary Report

Succession Planning





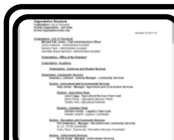
Succession Planning - Candidates for…….

Administration Module

Users Listing

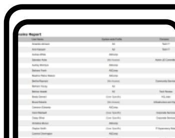
Linked Employees (Organization Structure)

Users Login Audit

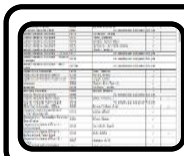


Organization Structure

Domain Users Report



User Domains Report



Linked Jobs (Organization Structure)

Employee/Supervisor Relationship

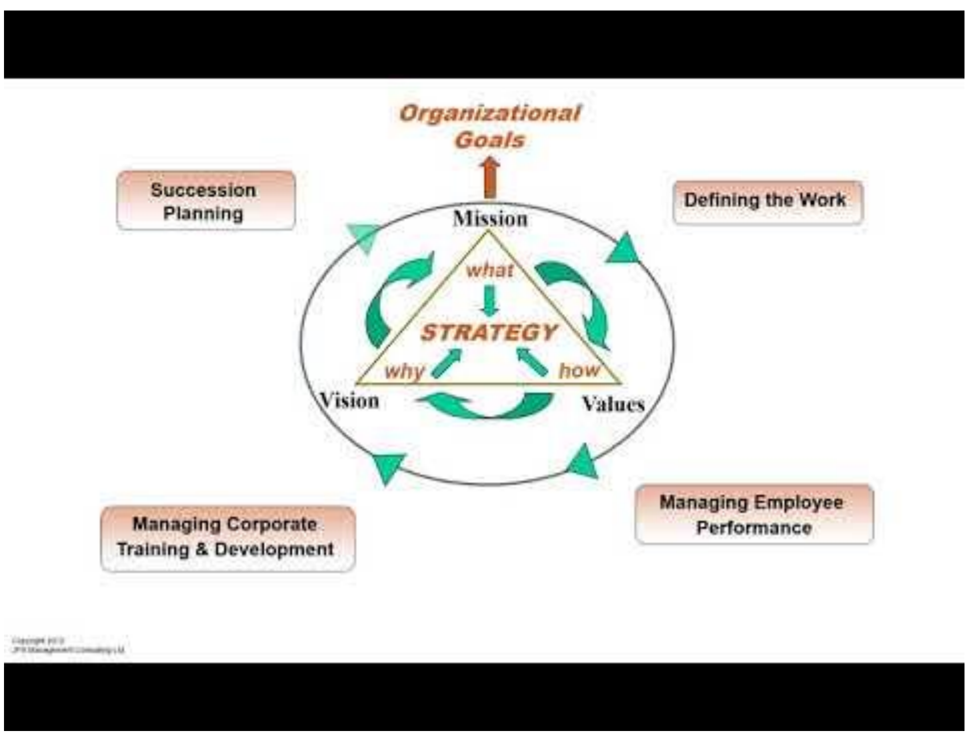
Encompassing Visions Process Flowchart

ENCV

1. Understanding the **Technical Requirements**
2. **System Administration** Setup
3. **System Configuration** Setup
4. Completing the **Job Data Collection and Evaluation Process**
5. The Value of Establishing **Domains**
6. Learning and Growth **Review Administration & Implementation** Setup
7. Learning and Growth **Reviews**
8. **Organizational Learning and Growth**
9. **Succession Planning**
10. Aggregate **Reports**
11. **Mobile App** - Completion of Reviews
12. **Software Configuration**
13. **System Requirements**
14. **System Audit Checklist**
15. **Reports**

Encompassing Visions Process

Click on images to view the ENCV processes.



For more information, please call us at:

Toll Free: **(866) 913-ENCV (3628)**

Local: **(403) 259-6210**

eMail: **crelations@encv.com**