ENCOMPASSING VISIONS™

Performance Reports and
Dashboard Reporting

Version 2018.1.0

Revised 2018
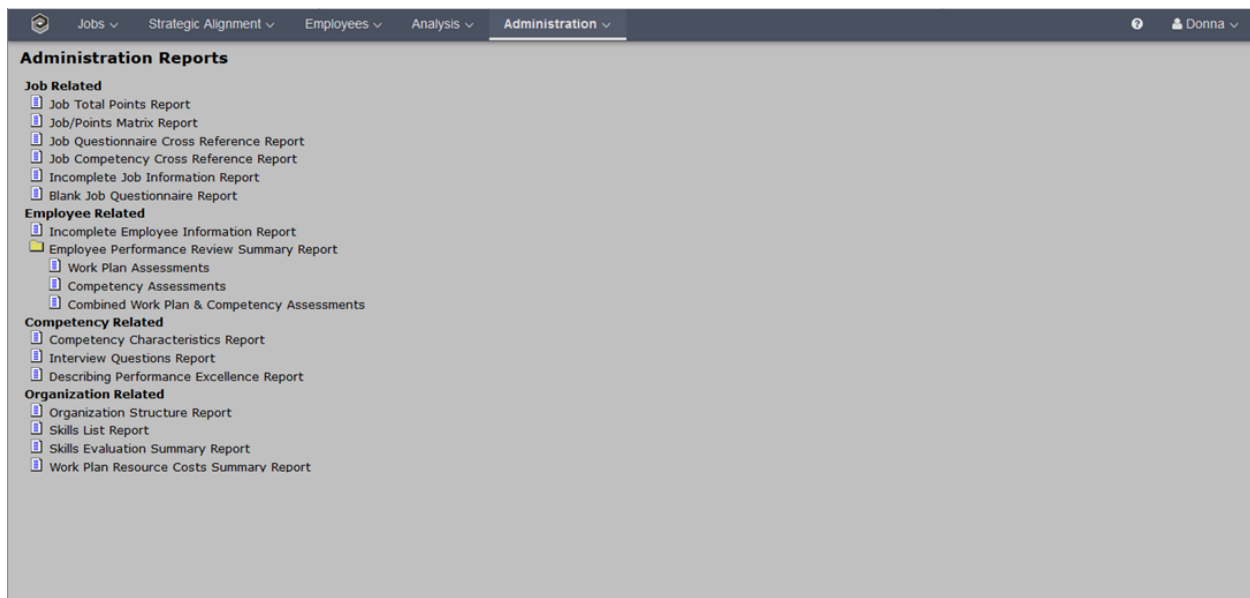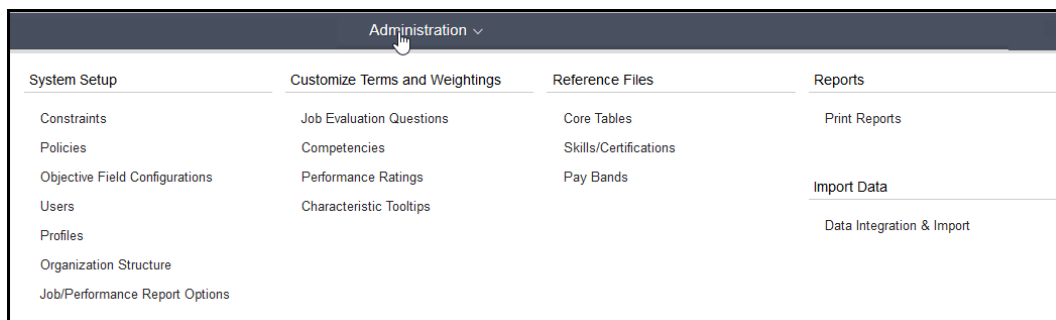
Performance Reports and Dashboard Graphics

Graphical and analytical reports are available in *en*Compassing Visions that effectively communicate and track performance 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 the Administration module, and specifically in the Administration Reports area.

Under the sub-heading 'Employee Related', much of this detailed information about people and team performance is available for analytical comparisons over time. This is also (under the sub-heading 'Organization Related') where information about the financial costs ($'s) related to specific business objectives can be tracked for organizational budgeting purposes.

From the **Main Menu** move the mouse over **Administration** and click the **Print Reports** function:

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Work Plan Resource Summary Report

Work Plan Resource Costs Summary Report ⊗

Group By	Filter
☐ **Organization Unit**	(All) ▾
	☐ Include all sub-units
☐ **Location**	(All) ▾
☐ **Job Type**	(All) ▾
☐ **Work Group**	(All) ▾
☐ **Resource Category**	(All) ▾
Review Completion Date	From 2017-04-28 📅 To 2018-04-28 📅

Generated Report:

Work Plan Resource Costs Summary Report

Actions: 🖨 💾 📄

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Work Plan Resource Costs Summary Report
From 2017-04-29 To 2018-04-29

Generated on 2018-04-29.

Org Level	Emp ID	Emp Name	Work Plan Title	Objective	Resource Category	Resource Costs Details	Estimated Cost
Section: Corporate Support Services	000011	Anderson, Jackie	Fiscal 2017 October Objective	Accuracy	Other Budgeted Costs	Software Program purchase - "Accuracy +"	$450.00
Section: Corporate Support Services	000016	Berutti, Franco G.	Fiscal 2017 October Objective	Accuracy	Other Budgeted Costs	Software Program purchase - "Accuracy +"	$450.00
Division: HR / Payroll Team	000048	Demke, Gordon	Fiscal 2017	test	Additional Equipment	test	$1.00
Division: HR / Payroll Team	000048	Demke, Gordon	Fiscal 2017 October Objective	Accuracy	Other Budgeted Costs	Software Program purchase - "Accuracy +"	$450.00
Division: HR / Payroll Team	000008	Edwards, Cameron J.	Fiscal 2017 October Objective	Accuracy	Other Budgeted Costs	Software Program purchase - "Accuracy +"	$450.00
Division: HR / Payroll Team	000008	Edwards, Cameron J.	Fiscal 2018 test	test	Additional Software	test	$3.00
Division: Administrative Team	000999	Gordon, Nancy Ellen	Fiscal 2017	Daily Reports	Additional Equipment	Filing System	$150.00
Division: Administrative Team	000999	Gordon, Nancy Ellen	Fiscal 2017 October Objective	Accuracy	Other Budgeted Costs	Software Program purchase - "Accuracy +"	$450.00
Organization: Risk Management	0000004	Graham, Franklin	Fiscal 2017	Fraud Awareness	Education	Fraud Awareness	$425.00
Division: Administrative Team	000101	Lambertino, Donna	Fiscal 2017	enable edit in word	Additional Software	Test	$2,000.00
Division: Administrative Team	000052	Vaid, Phuman	Fiscal 2017 October Objective	Accuracy	Other Budgeted Costs	Software Program purchase - "Accuracy +"	$450.00
Division: Administrative Team	000056	Yonker, Kristen	Fiscal 2017 October Objective	Accuracy	Other Budgeted Costs	Software Program purchase - "Accuracy +"	$450.00

	Grand Total Estimated Cost for 12 Resource Costs(s):	**$5,729.00**

Additional Equipment: $151.00
Additional Software: $2,003.00
Education: $425.00
Other Budgeted Costs: $3,150.00

Resource Category	**Resource Costs Description**
Additional Equipment	Additional equipment will be required to achieve this objective.
Additional Software	
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.

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Organizational Performance:

In the 'Analysis' module found on the main System Menu, the Organizational Performance module enables team leaders, management and executive staff to review detailed reports about their organizational units performance vis-à-vis the organization as a whole, for any particular period of time. With information presented in both report detail and graphical display formats, every person responsible for managing others can know whether the performance of their team is improving over time, what specifically is changing, who is contributing to that change, what staff assignment/training investment decisions seem to be making the difference, whether the change is consistent with organizational values, and if consistently demonstrating improved organizational values is achieving greater organizational success.

For Dashboard Reporting:

This screen is found in **Analysis**. Click on **Organizational Performance** function.

(A Competency and Technical Skill 'Strength' is determined by the *Policy: Employees > Competency Reviews > What constitutes a strength in your organization?*)

In the following report example, the performance of the Organization Unit - Agricultural and Environmental Services (along with the sub units) is based on the Reviews completed between May 2/2014 – May 2/2018 *Note: This organization has designated their Strength to be 4*

Frequency: this is the number of Employees who have this competency or skill evaluated as a strength or development opportunity.

Gap: The difference between the employee's performance rating and the maximum possible evaluation result they could have received for the competency. It is based on completed, averaged reviews during the selected review period, and the relative importance of each Competency in the Employee's Job (which in turn is a product of the Job Evaluation process that determined what the job is paid to do.)

By clicking on the screen option "Performance Dashboard" at the bottom of the 'Organization' filters, this is what the system generates...

Department Review Summary
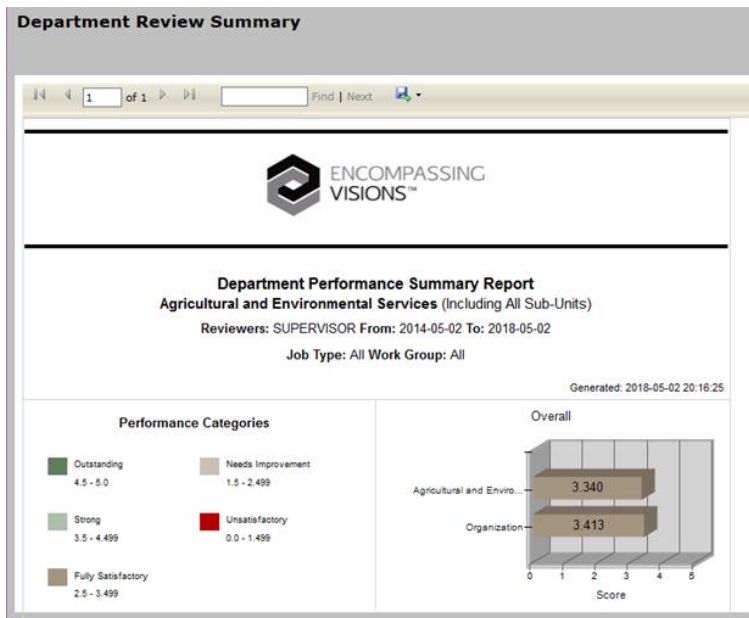
The Organizational report compares the selected Unit's results with the Organization's results.

In this particular example, the report lists 'Customer Service' as an organizational Strength for Agricultural and Environmental Services and its related sub-units. There 1 employees who demonstrates 'Customer Service' particularly well within the organizational area, and the detailed report available within this module tells you who the individual is. If you will, this employee could be considered a potential mentor to others needing development with 'Customer Service'.
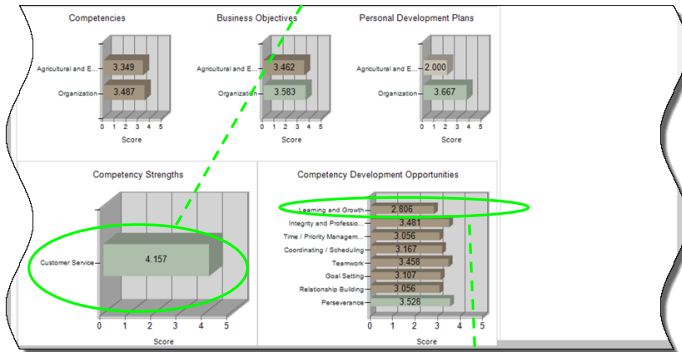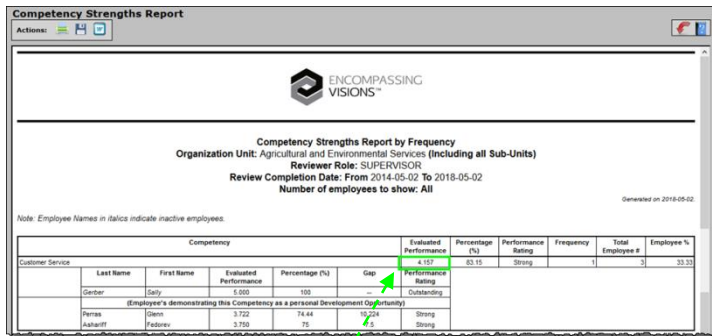
Contained in the same Dashboard Report is detailed information about Competency Development Opportunities for staff within the department. This report summarizes the behavioural competencies demonstrated at less than desirable levels of performance, and presents the information based on priority for development need.
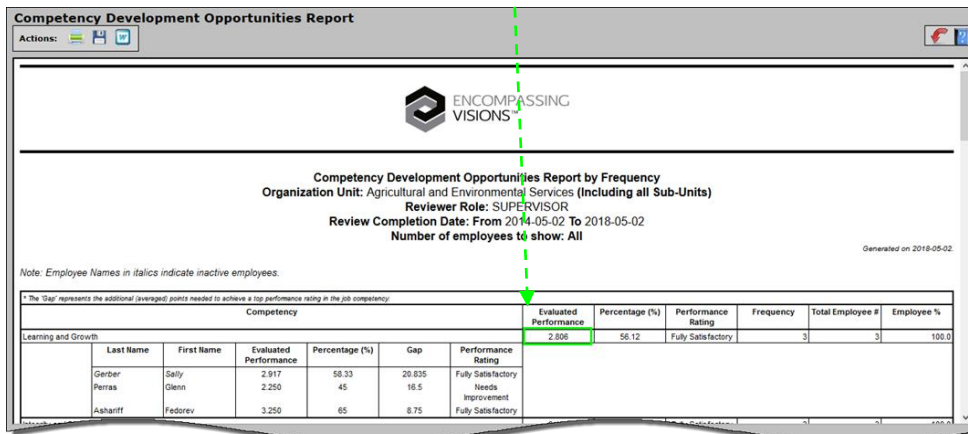
This report provides a very unique insight into an organization, and helps ensure staff training/development investments are as effective as possible. 'Unique' because identified Development Opportunities (or gaps) are based on 3 measures within *en*Compassing Visions – 1) the performance review (single or multi-rated), 2) the job- specific importance of each competency in each job, and 3) the fact that the job-specific importance of each competency in each job is determined through the job evaluation process that determined what the job is worth, and why. That's what enables *en*Compassing Visions to so significantly eliminate bias and subjectivity in the identification of training needs, while at the same time enable organizations to more objectively quantify the effectiveness of their training investments.

As noted in the sample report below, 3 of the three employees need to develop their Learning and Growth skills to make it a personal 'Strength'. Based upon this report, the organization can see at a glance who they are.

The Technical Skill Strengths Report itemizes the particular Technical Skills whose Strengths occur the most often in the selected Organizational Unit or for the selected Employees. As indicated in the above dashboard and report below, the top technical strength for the Agricultural and Environmental Services organizational unit is 'Grounds Equipment. One out of the two employees exhibits this skill as a Strength.

One employee's evaluated performance is equal to or above the definition of strength for the organization.

The Technical Development Opportunities report shows those Technical Skills that exhibit the largest and most frequent gaps in the selected Organization Unit or for the selected Employees.

Technical Skill Development Opportunities Report

Actions:

Technical Skill Development Opportunities Report by Frequency
Organization Unit: Agricultural and Environmental Services **(Including all Sub-Units)**
Reviewer Role: SUPERVISOR
Review Completion Date: From 2014-05-02 **To** 2018-05-02
Top Technical Skill Development Opportunities

Generated on 2018-05-02.

	Evaluated Performance	Percentage (%)	Performance Rating	Frequency	Employee # with the Skill	Employee %
Communication Technologies	3.000	60.00	Fully Satisfactory	3	3	100.00
Public Speaking	3.000	60.00	Fully Satisfactory	2	2	100.00
Transportation of Dangerous Goods (TDG)	3.125	62.50	Fully Satisfactory	2	2	100.00
WHMIS	3.125	62.50	Fully Satisfactory	2	2	100.00
Occupational Health and Safety	3.417	68.33	Fully Satisfactory	2	3	66.67
MS Outlook	2.500	50.00	Fully Satisfactory	1	1	100.00
Critical Thinking	3.000	60.00	Fully Satisfactory	1	1	100.00
Alberta Blaster's Permit	3.500	70.00	Strong	1	1	100.00
Apprenticeship	3.500	70.00	Strong	1	1	100.00
Backhoe - AMHSA	3.500	70.00	Strong	1	1	100.00
Budget Administration	3.500	70.00	Strong	1	1	100.00
Coaching / Mentoring	3.500	70.00	Strong	1	1	100.00
Heavy Equipment - Operations	3.500	70.00	Strong	1	1	100.00
Interviewing	3.500	70.00	Strong	1	1	100.00
Management Skills	3.500	70.00	Strong	1	1	100.00

As noted above in the dashboard report, Communication Technologies is a technical skill that is a weakness for the organizational unit. Employees who show the greatest development opportunity are listed. These will be employees whose evaluated performance rating is less than the definition of strength for the organization.

Technical Skill Development Opportunities Report by Frequency
Organization Unit: Agricultural and Environmental Services **(Including all Sub-Units)**
Reviewer Role: SUPERVISOR
Review Completion Date: From 2014-05-02 **To** 2018-05-03
Top Technical Skill Development Opportunities
Number of employees to show: 5

Generated on 2018-05-03.

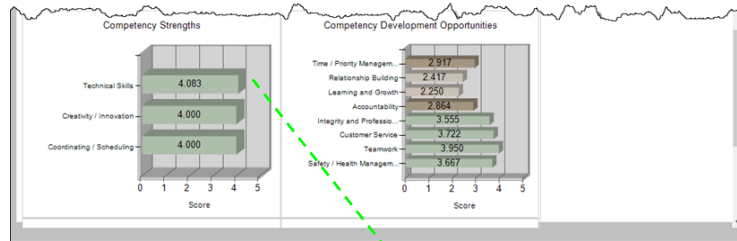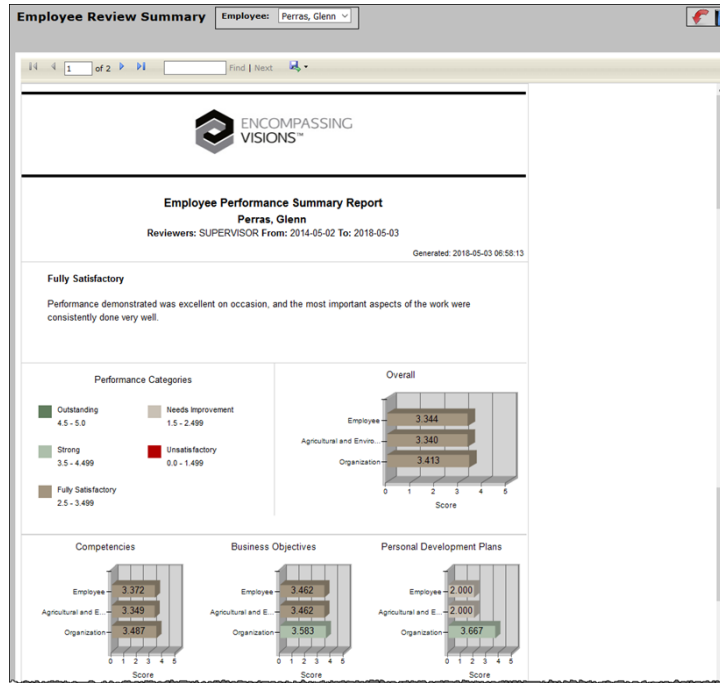*Note: Employee Names in italics indicate inactive employees.*

			Evaluated Performance	Percentage (%)	Performance Rating	Frequency	Employee # with the Skill	Employee %
Communication Technologies			3.000	60.00	Fully Satisfactory	3	3	100.00
	Last Name	First Name	Evaluated Performance	Percentage(%)	Performance Rating			
	Perras	Glenn	2.500	50.00	Fully Satisfactory			
	Gerber	Sally	3.000	60.00	Fully Satisfactory			
	Ashariff	Fedorev	3.500	70.00	Strong			
Public Speaking			3.000	60.00	Fully Satisfactory	2	2	100.00
	Last Name	First Name	Evaluated Performance	Percentage(%)	Performance Rating			
	Perras	Glenn	3.000	60.00	Fully Satisfactory			
	Ashariff	Fedorev	3.250	65.00	Fully Satisfactory			
Occupational Health and Safety			3.417	68.33	Fully Satisfactory	2	3	66.67
	Last Name	First Name	Evaluated Performance	Percentage(%)	Performance Rating			
	Gerber	Sally	2.500	50.00	Fully Satisfactory			
	Ashariff	Fedorev	3.750	75.00	Strong			
	(Employees demonstrating this Skill as a personal Strength)							
	Perras	Glenn	4.000	80.00	Strong			
MS Outlook			2.500	50.00	Fully Satisfactory	1	1	100.00
	Last Name	First Name	Evaluated Performance	Percentage(%)	Performance Rating			
	Perras	Glenn	2.500	50.00	Fully Satisfactory			
Critical Thinking			3.000	60.00	Fully Satisfactory	1	1	100.00
	Last Name	First Name	Evaluated Performance	Percentage(%)	Performance Rating			
	Gerber	Sally	3.000	60.00	Fully Satisfactory			
Alberta Blaster's Permit			3.500	70.00	Strong	1	1	100.00
	Last Name	First Name	Evaluated Performance	Percentage(%)	Performance Rating			
	Perras	Glenn	3.500	70.00	Strong			
Heavy Equipment - Operations			3.500	70.00	Strong	1	1	100.00
	Last Name	First Name	Evaluated Performance	Percentage(%)	Performance Rating			
	Ashariff	Fedorev	3.500	70.00	Strong			
Interviewing			3.500	70.00	Strong	1	1	100.00
	Last Name	First Name	Evaluated Performance	Percentage(%)	Performance Rating			
	Gerber	Sally	3.500	70.00	Strong			
Management Skills			3.500	70.00	Strong	1	1	100.00
	Last Name	First Name	Evaluated Performance	Percentage(%)	Performance Rating			
	Gerber	Sally	3.500	70.00	Strong			

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. Creating amazing results for the Organization.	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 needed.	0.000 - 1.499

As mentioned earlier, *en*Compassing Visions calculates the difference between job-specific expectations and employee-specific observations to early-identify potential mentors, effectively develop training plans, and over time quantify the impact of all training investments. And because technical and behavioural competencies are

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job specific, **always** based on what the incumbent is paid to do, and **specifically** tied to organizational goals and values, improving employee performance as measured in *en*Compassing Visions will consistently and positively correlate with measures of organizational success.

enCompassing Visions generates a dashboard report that summarizes the technical skills and behavioural competencies identified in the review period as either a strength or development need for each employee.
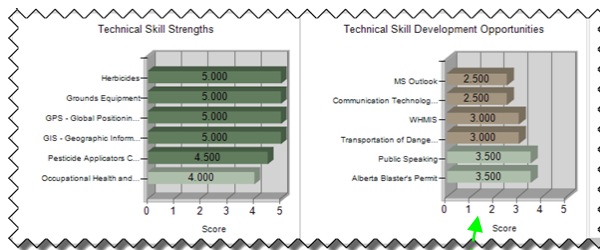

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In our example, the Employee Competency Strength Analysis Report indicates that Glenn Perras exhibits Technical Skills, Coordinating/Scheduling, and Creativity/Innovation as personal strengths. The Employee Competency Development Opportunity Analysis Report shows the Competencies where he fell (just) short.

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Employee Competency Development Opportunity Analysis Report
Organization Unit: Agricultural and Environmental Services (Including all Sub-Units)
Reviewer Role: SUPERVISOR
Review Completion Date: From 2014-05-02 To 2018-05-03

Generated on 2018-05-03

Last Name	First Name	Competency	Evaluated Performance	Percentage (%)	Gap	Performance Rating
Perras	Glenn	Time / Priority Management	2.917	58.33	18.75	Fully Satisfactory
		Relationship Building	2.417	48.33	18.08	Needs Improvement
		Learning and Growth	2.250	45.00	16.50	Needs Improvement
		Accountability	2.864	57.27	14.96	Fully Satisfactory
		Integrity and Professionalism	3.556	71.11	14.45	Strong
		Customer Service	3.722	74.44	10.22	Strong
		Teamwork	3.950	79.00	9.45	Strong
		Safety / Health Management	3.667	73.33	9.33	Strong
		Perseverance	3.834	76.67	9.33	Strong
		Decision Making	3.250	65.00	8.75	Fully Satisfactory

Technical Skill Strengths

	Score
Herbicides	5.000
Grounds Equipment	5.000
GPS - Global Positionin...	5.000
GIS - Geographic Inform...	5.000
Pesticide Applicators C...	4.500
Occupational Health and...	4.000

Technical Skill Development Opportunities

	Score
MS Outlook	2.500
Communication Technolog...	2.500
WHMIS	3.000
Transportation of Dange...	3.000
Public Speaking	3.500
Alberta Blaster's Permit	3.500

At a glance, the 'Dashboard' and 'Analysis' reports display his personal development priorities as they relate to the technical skills he needs in his job.

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Employee Technical Skill Development Opportunity Analysis Report
Organization Unit: Agricultural and Environmental Services (Including all Sub-Units)
Reviewer Role: SUPERVISOR
Review Completion Date: From 2014-05-02 To 2018-05-03

Generated on 2018-05-03

Last Name	First Name	Skill	Evaluated Performance	Percentage (%)	Performance Rating
Perras	Glenn	Communication Technologies	2.500	50.00	Fully Satisfactory
		MS Outlook	2.500	50.00	Fully Satisfactory
		Transportation of Dangerous Goods (TDG)	3.000	60.00	Fully Satisfactory
		WHMIS	3.000	60.00	Fully Satisfactory
		Alberta Blaster's Permit	3.500	70.00	Strong
		Public Speaking	3.500	70.00	Strong

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