

Putting BLUE to Work at Washtenaw Community College

Gloria Eccleston and Amy Artiles



Washtenaw
Community
College

Situation at Hand

- Excess BLUE capacity and supporting resources –
 - Winter and Spring/Summer SOQs cancelled
 - SOQs are our course and faculty evaluations
- Typically evaluate:
 - over 7,000 Students
 - almost 34,000 Surveys
 - approximately 1,600 Courses
 - over 700 Faculty members
 - within 6 Academic Divisions
- Response rates range from 60% to 76%

Situation at Hand

- Standard Appraisals Procedure:
 - Standardized paper-based form
 - Face-to-face meeting with handwritten signatures
 - Paper copies are stored in HR files and a copy sent via intercampus mail to each employee
- Virtual campus with majority of employees working remotely
 - Required a virtual way for conducting performance appraisals

360 Surveys and Our Need

- The Need: A multi-user survey that produces one report in which:
 - The Supervisor rates the employee
 - The Employee can view, comment and sign the appraisal
 - The Executive Officer views and signs the appraisal
- Our main focus has been student surveys
 - Multiple Secondary (Multiple Secondary Pairings)
- No experience with 360 surveys

Audience



355 WCC Employees



All Employees broken down into 3 Employee Groups (Classifications)



3 levels of Supervisors :

1. Direct Supervisor
2. Supervisor II (sometimes)
3. Executive Officer

Scope

Employee Group	Custodial Maintenance	OPT (Office Professionals)	Independent
Employees	69	100	186
Direct Supervisors	8	42	58
Supervisor II	2	10	9
Executive Officer	2	12	15
Total Employees being Appraised: 355			

Scope

- Three Employee Groups, each with common and unique questions
- Three separate Blue Projects

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Our Project and Reports

Setup

- 360 survey
- “User type” datasource for ALL of the Subjects
- Made the fields linkable
- Project definition type is “Subjects”
- Where Employees are the “Single Subject”

The screenshot shows the BLUE ADMIN interface for editing the 'WCC-AllEmployees' datasource. The 'Import/Export' tab is selected, showing 'System Fields' and 'Available fields'.

System Fields:

- User ID: OriginalID_1 (dropdown) * Use UPN or SAMACCOUNTNAME if Active Directory authentication is enabled.
- Given name: FirstName_1 (dropdown) *
- Family Name: LastName_1 (dropdown) *
- Email: FullEmail_1 (dropdown) Email is necessary for system notifications and task reminders
- Mobile Number: (empty dropdown) Required for messaging service only
- Blue User Type: Blue_Role (dropdown) Required for Blue user type import only
- Datasource Access Key(s): (empty dropdown) Used to grant access to restricted datasources.
- Language: (empty dropdown) User preferred language

Available fields:

Field Name	Linkable	Hierarchical
Reports_To	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Main_Function	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Direct_Supervisor	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Supervisor_II	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Executive_Officer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Staff_Group	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Datasource_Access_Key	<input type="checkbox"/>	<input type="checkbox"/>
PreferredLanguage_1	<input type="checkbox"/>	<input type="checkbox"/>
Employee_Classification	<input type="checkbox"/>	<input type="checkbox"/>

Options at the bottom:

- Replace Existing Blue User Types
- Replace datasource access keys
- Replace language preferences
- Abort if imported data table is empty

A	B	C	D	E	F	G	H	I	J	K
OriginalID	FullEmail	FirstName	LastName	Blue_Role	Direct_Supervisor	Supervisor_II	Executive_O	Staff_Group	Organization	Job_Level
geccleston	geccleston@	Gloria	Eccleston	23	pbaccile	rbellanca	khurns	IN	20040	I108

Project Setup

- Questionnaire setup:
 - The Direct Supervisor's rates each Employee
 - The Employee and Executive officer have questions in response to the ratings
- Triggers:
 - All questions are hidden by default
 - Used triggers with conditions based on the Rater group
 - Allowed each of the three levels to see the appropriate questions on the survey

The Workflow

- Direct Supervisor completes the survey for each Employee
- Virtual review meeting - the Direct Supervisor and the Employee
- Direct Supervisor modifies the date of the Employee FO task
- Employee to supply their own comments, after seeing the report

Subject View Management

- FO tasks setup:
 - Date range for all FO tasks applies to all 3 groups within the project
 - Need the Direct Supervisors to change the start date using SVM
- SVM setup:
 - Privilege given to the Direct Supervisors only

The screenshot shows the 'Group Details' configuration window for the 'Direct Supervisors' group. The window is divided into several sections:

- Group Name:** Direct Supervisors
- Link Type:** Links to
- Datasource:** WCC-AllEmployees
- Link Field:** Reference ID: Direct_Supervisor; In: WCC-AllEmployees; Is User ID in: WCC-AllEmployees
- Privileges:** A list of checkboxes for various permissions. The checked items are: Form Fill Out, Report Viewing, and Subject View Management. Other unchecked items include Rater Selection, Rater Selection Signing, Question Personalization, Question Personalization Approval, Fill Out Approval, Report Creation, Subject View, and Subject Fill Out.
- Member Options:** Min: 0; Max: (Empty -> Unlimited); Allow Minimum One; Enable for Distributed Selection; Allow empty rater list.

At the bottom right, there are 'Apply' and 'Cancel' buttons. A note at the bottom of the privileges section states: 'Note: Only one Member Selection group and one Question Personalization group are allowed per project.'

Subject View Management

- SVM setup:
 - Enabled schedule evaluation date range (Info> Advanced settings)
 - Direct Supervisors received SVM privilege
 - They could modify the dates that the survey and reports were available to their employee and others

Info Questionnaire Definition Subjects

Content Options **Advanced Settings**

Advanced Settings

The settings below allow for delegated control of key subject level evaluation settings.

[Download the list of external triggers](#)

Project setting rules

Require consensus when multiple stakeholders are involved

Subject evaluation status

Delegate primary subject evaluation status
Default status **Opt in**

Delegate secondary subject evaluation status
Default status **Opt in**

Evaluation medium

Delegate evaluation medium
Default medium **Online**

Evaluation timing

Delegate evaluation timing
Default timing **Scheduled** **Started**

Delegate scheduled evaluation date range

Report Setup

- Individual Reports with automatic update
- System will synchronize and add any Direct Supervisor, Employee, or Executive Officer comments to the report when they've been received
- This automatic update is an overnight process
 - manually update the report so it is reflected immediately

The screenshot displays the 'My Reports' interface for editing an 'Annual Performance Appraisal Independent Group - 2019 / 2020 Individual' report. The interface includes a navigation bar with tabs for Info, Content, Filters, Subjects, Viewers, Access, Project Mapping, and Distribution. The 'Content' tab is active, showing various configuration fields:

- Project Title:** Annual Performance Appraisal Independent Group - 2019-2020
- Report Title:** Annual Performance Appraisal Independent Group - 2019 / 2020 Individual
- Individual Report Title:** [SSLN] [SSFN] Annual Performance Appraisal Independent Group - 2019 / 2020 Individual
- Report Description:** (Empty text area)
- Tags:** Email Off (checked), All
- Category:** Spring/Summer
- Subcategory:** 2020
- Header:** (Empty text area)
- Footer:** Performance Evaluation Independent Group 2019 / 2020
- Remarks:** (Empty text area)
- Prepared by:** Amy Artles (anartles) (checked) Hide Prepared by
- Report Type:** Individual (selected), Group by WCC-AllEmployees, Distributed, Breakdown by Secondary Subject, Export, Automatic Update (checked), Update static viewers automatically from project group definition, Merge Subjects

Report Setup

My Reports
🕒 Editing: Annual Performance Appraisal Independent Group - 2019 / 2020

Info | Content | Filters | Subjects | Viewers | Access

Content | Options

Report Options

Threshold Minimums

Responses

Invitations

Response Percentage %

Included Responses

Active - Submitted

Active - Saved

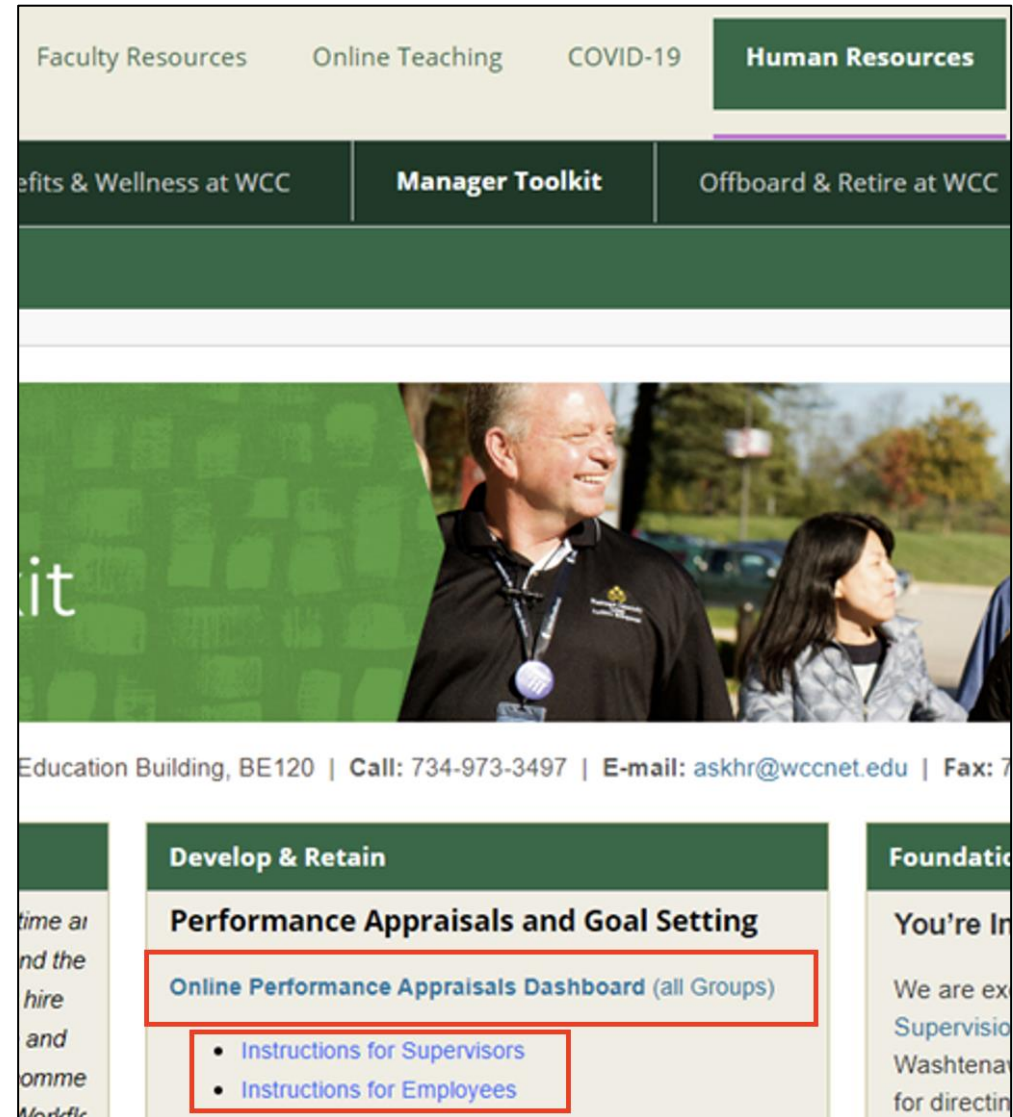
Deleted - Submitted

Deleted - Saved

- Enable for both the Saved and Submitted responses to display a report

Blue Dashboard Access

- All participants access the Blue Dashboard with all Tasks and Reports via a link in Blackboard
- Direct link that we email
- Instructions for Employees and Supervisors are detailed and available on the same Blackboard module



Process

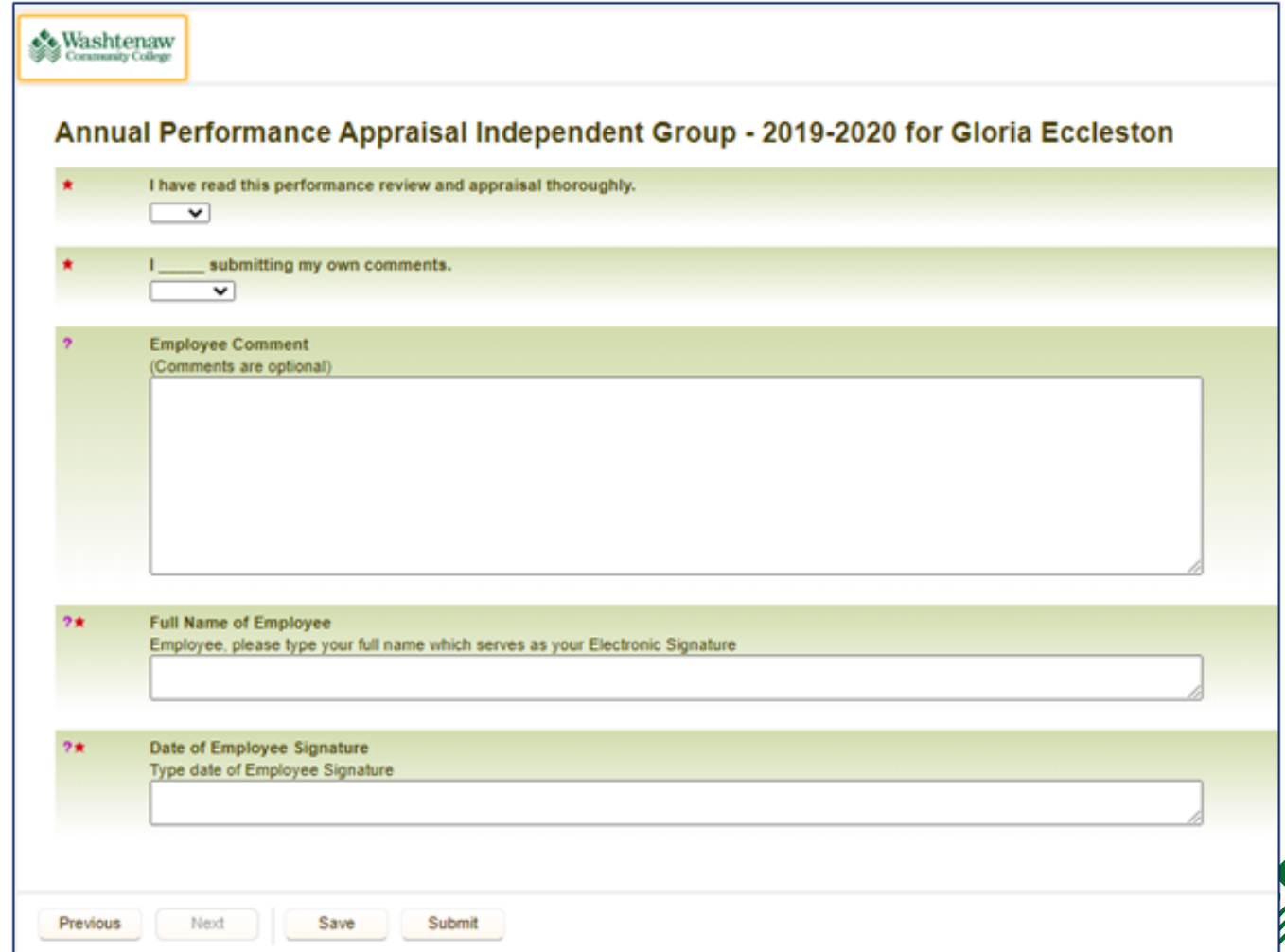
Direct Supervisor
Employee
Executive Officer

Direct Supervisor



Employee

- Review Acknowledgement
- Optional Comments
- Signature and Date



The screenshot shows a web-based form for an annual performance appraisal. At the top left is the Washtenaw Community College logo. The title of the form is "Annual Performance Appraisal Independent Group - 2019-2020 for Gloria Eccleston". The form contains several sections:

- A required field (marked with a red star) for "I have read this performance review and appraisal thoroughly." with a dropdown menu.
- A required field (marked with a red star) for "I ___ submitting my own comments." with a dropdown menu.
- An optional field (marked with a purple question mark) for "Employee Comment (Comments are optional)" with a large text area.
- A required field (marked with a purple question mark and red star) for "Full Name of Employee" with the instruction "Employee, please type your full name which serves as your Electronic Signature" and a text input field.
- A required field (marked with a purple question mark and red star) for "Date of Employee Signature" with the instruction "Type date of Employee Signature" and a text input field.

At the bottom of the form are four buttons: "Previous", "Next", "Save", and "Submit".



Executive Officer



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Annual Performance Appraisal Independent Group - 2019-2020 for Gloria Eccleston

EXECUTIVE OFFICER'S SIGNATURE AND DATE:
After reviewing each evaluation, please sign and date as your acknowledgement.

?* **Full Name of Executive Officer**
Executive Officer, please type your full name which serves as your Electronic Signature

?* **Date of Executive Officer Signature**
Type date of Executive Officer signature

Executive Officer, please fill in all fields and then click the Submit button.

- Similar electronic acknowledgement and sign off
- No meeting with Direct Supervisor
- Must reference the Report for specifics



Challenges

Challenges

New client (HR Dept) and audience to service

Not familiar with this team and their working style

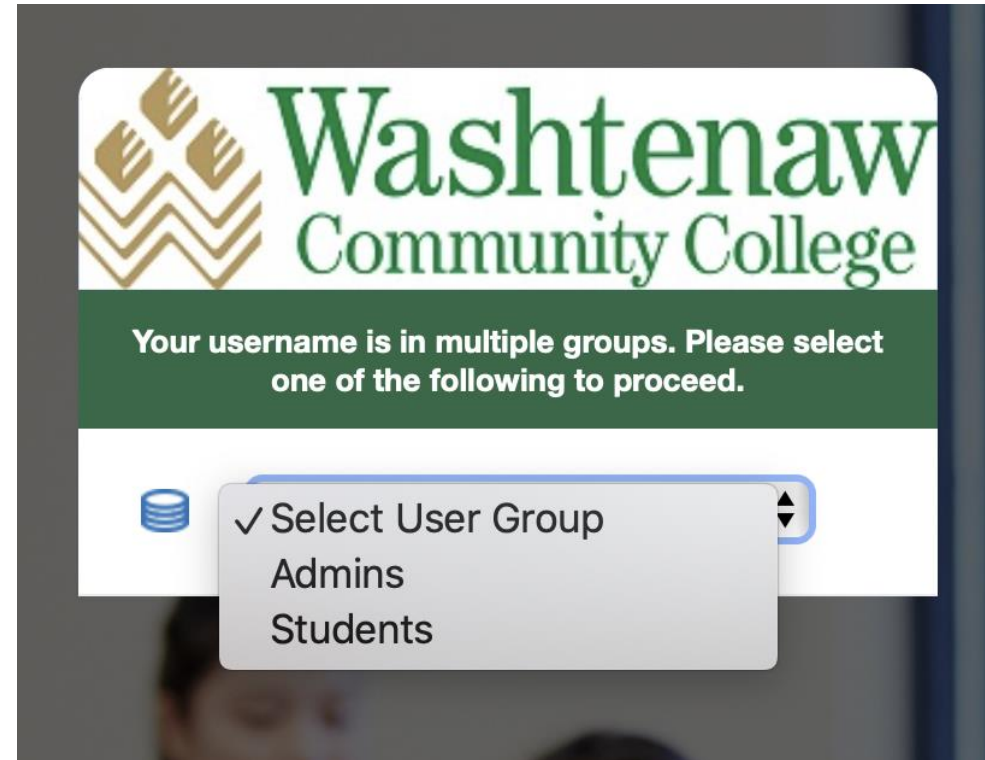
No one was familiar with 360s

Client was not aware of capabilities, nor were we totally versed in all of the options

They were not familiar with the tool

Challenges - Datasources

- Created datasources specific to project
- Problem: anyone involved with more than one group had to select a datasource at login
- Those involved in the Student surveys and the new Performance appraisals must also select a database
- We built datasources and did not use them but we were unable to totally delete these datasources and definitions



Challenges – Presentation

- We wanted it be as close to perfect as possible for good campus buy-in
- Font size was reported as too small after the project was published
- Text wrap for the open comment boxes was controlled by the width of the comment box (as percentage) as opposed to number of characters
- Had to increase font size and include text wrap in each comment box

Challenges – Testing and Sharing the Reports

- Testing was difficult
 - Process was not clear
 - Changes and suggestions were coming from too many directions
- Reports process and update overnight
 - Reports cannot be shared immediately with their employee
 - Direct Supervisors must wait for overnight process to occur
 - Manual Update from the Publish tab, and then Save the Report
 - Saving the report alone does not update it

What we Discovered

Discoveries



Simple is best



Single definition, with single datasource streamlines the users workflow



You have to remember to add the members to the Global group in each project – they are independent groups



Working with HR they suggested things before the employees and supervisors were exposed



Multiple answer question type prompts



Font size and text wrap improvements were added to our SOQs to make them more user friendly

Discoveries



Report processes overnight



If you have more than one similar projects to create, or multiple yet similar reports to build, get one done before tackling the second project. Many of the components can be recycled by copying the project or report and thus saving a lot of time



For the future – work with Explorance team as the Other field the associated comment didn't show on the reports

Discoveries: SVM and Fixed Date

- SVM is not linked with your report distribution if you have a fix distribution date
- The fixed date means that all reports will be distributed on that date
- If new appraisals are added to the report after the distribution date, the reports for those employees will be immediately be available, since the distribution date is in the past

The screenshot shows the 'My Reports' interface for an 'Annual Performance Appraisal Independent Group - 2019 / 2020 Individual'. The 'Distribution' tab is selected. The 'Start Date' is currently 'Not Set' (00:00). The 'Subject end date' dropdown is highlighted in yellow, and the 'Apply' button next to it is also highlighted. The 'Fixed Start Date' option is selected. The 'Hour / Minute Setting' is currently empty. A 'Clear Date' button is visible at the bottom.

Summary

- Challenges – a lot
- Discoveries – a lot
- Opportunities – a lot
- Support – a lot

Questions?



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