



Rashtriya Sikshana Samithi Trust<sup>®</sup>  
**RV Educational Institutions<sup>®</sup>**

**RV EDUCATIONAL INSTITUTIONS**

**BENGALURU**

**POLICY ON**

**PERFORMANCE MANAGEMENT**

**PRiSM**

**Performance Review & Skills Management**



  
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R.V. DENTAL COLLEGE





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## POLICY ON PRiSM

### 1. Objective:

The RV Educational Institutions (RVEI) recognizes the value of its employees and understands that the quality of RVEI services depends upon the employees. This policy sets forth the guidelines for evaluating the performance of employees in accordance with the RVEI employee performance appraisal process. Performance appraisals shall be scheduled, conducted, and documented according to the provisions of this policy.

Confidentiality of the performance appraisals shall be maintained to the greatest extent possible.

### 2. Purpose of PRiSM

Performance appraisals provide a means of informing employees of the quality of their work and identifying areas of performance that may need improvement. They are to be used as a positive, constructive tool to measure an employee's performance. Performance appraisals help managers provide valuable feedback to employees concerning their job performance and the RVEI's expectations.

Additionally, performance appraisals are a valuable management tool to assist in making personnel decisions including, but not limited to, training needs, merit pay adjustments, transfers, promotions, career development etc. The objectives of the appraisal process are

- To provide clearly defined performance standards based upon the employee's current job description to ensure that employees know what is expected of them.
- To encourage managers and employees to have face-to-face discussions and let employees know how they are doing in terms of their job performance. This should happen periodically all through the year, instead of a single yearend process as the feedback helps employees to do course correction in case of weaknesses, if any.
- To express appreciation for outstanding contributions and performance; conversely, to discuss performance areas where improvement is possible or needed and to outline plans for improving performance.
- To suggest and measure behavioural parameters related to the position and possible improvement areas

### 3. Role in PRiSM

Appraisee: Employee

Appraiser: Immediate Manager

Reviewer: Manager's Manager / Matrix Manager



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#### 4. Responsibility and Monitoring

The Human Resources Department is responsible for the administration of the RVEI's performance appraisal system. Any change in policy, procedures, or forms related to performance appraisals will be communicated immediately by the HR, RVEI.

Respective HOIs / HODs will work with the Human Resources Department in communicating the importance of the PRiSM process in distributing all required performance appraisal materials and in ensuring that performance appraisals are completed in a timely manner.

**The immediate manager is responsible for conducting performance appraisals for all employees under his / her supervision. In the case of multiple managers, the evaluation will be conducted by the manager who oversees the majority of the work. If an employee has two assignments the current reporting manager will conduct the performance evaluation.**

HOIs are responsible for ensuring that all managers who report to them conduct performance appraisals of all employees in their respective departments in a timely manner as specified in this policy.

#### 5. Schedule for PRiSM

An effective performance appraisal process requires ongoing communications between employee and manager to ensure that the employee has a clear understanding of the manager's expectations and continuous feedback on how he or she is doing on the job. There is a need, however, to periodically conduct formal performance appraisals as described below.

**Annual performance appraisals: All employees shall undergo performance appraisals annually. The performance assessment year will be from July to June for all RV Educational Institutes.**

##### Category of Employees & Schedule of PRiSM:

Category	Schedule	Remarks
Regular / FTC	July - June	-
Probation	On completion of Probation	Goals to be set at the start of probation period or start of appraisal period, whichever is earlier
Contract	On completion of contract	Goals to be set at the start of contract period or start of appraisal period, whichever is earlier
Trainee	On Completion of Training	Goals to be set at the start of training period or start of appraisal period, whichever is earlier
Support Group / Group D	July - June	Managers will complete the Assessment (No Self-Assessment)

- Contract Employee Assessment will be done offline by the end of contract.
- Trainee Assessment will be done off-line by end of training period.



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**Transfer or promotion to new positions during the PRiSM Calendar:** Two-way communication between new manager and employee should take place regarding the employee's new job duties and responsibilities, performance level, and future action plans. The new manager will have access to the previous manager's evaluation(s) and upon request should always be made available.

## 6. PRiSM - Performance Appraisal Process:

The PRiSM Process is designed to align individual performance objectives with the strategy and objectives and to direct individual efforts to the achievement of institution performance. Performance Management helps to strengthen the communication between employees and managers and provides employees with a clear understanding of what is expected of them and how their performance contributions are being assessed and recognized.

**Based on the performance scores, employees will be graded as detailed below**

Band	Band Values	Definition
Band 5+	4.51 to 5.0	Excellent
Band 5	4.0 to 4.50	Substantially Exceeded Expectations
Band 4+	3.5 to 3.99	Exceeded Expectations
Band 4	3.0 to 3.49	Met Expectations
Band 3	2.5 to 2.99	Partly Met Expectations
Band 2	2.0 to 2.49	Did not Meet some of the Expectations (*)
Band 1	<1.99	Did not Meet any of the Expectations (*)

(\*) - Employee is advised to improve his/her performance over the coming twelve months, which would be monitored by the Head of the Institution (HoI) over this period and performance will be reviewed and advised by HoI accordingly. HoI would also arrange for training/counselling in employee's areas of weakness. Employee is not eligible for Annual Increment.

### Step 1: Setting and Alignment of Performance Objectives / Goals

During the Annual Performance Planning meeting the manager has the opportunity to discuss with the employee goals for the year ahead and to set objectives to be cascaded down through the organization. The appraisee's objectives are derived from the objectives of the Department/Institution/RVEI.

The agreement on the objectives is done at the beginning of the PRiSM cycle or at the time of joining the organization in the case of new hires. The same document will be taken up again at the end of the year for the performance review.



Objectives must be **SMART** -

- S - Specific**
- M - Measurable**
- A - Achievable**
- R - Realistic**
- T - Timed**

### **Step 2: CPM – Continuous Performance Management**

CPM provides the employee to record / update their significant contributions against the set Goal/s. CPM can be done throughout the year.

### **Step 3: Evaluation of Performance & CPM**

This process comprises an interaction between the appraiser and appraisee where performance is measured against the objectives set and counselling / feedback is given to the appraisee.


#### **Stages of Evaluation of Individual assessment:**

1. First Stage - All managers will assess the performance rating & competencies of their employees in the department. In case of the HOD's, the assessment will be carried out by the respective HOI's.
2. Second Stage - The first review of the performance rating & competencies assessment of employees will be carried out by the respective HOIs. The HOI's may carry out any moderations to the scores of the employees, if required. This will be based only on overall and not individual goal ratings.
3. Third Stage - The final review of the performance rating of employees of all the institutions will be done by the RVEI Management Committee.
4. The final results of the appraisal will be communicated to each individual employee by Team HR.

## **7. Factors available for Assessment of Competencies:**

- Business
- General
- Management
- People
- SuccessFactors Premium Library
- Technical

Competency section is available for the Managers to rate the employee's competencies. Final Rating will include Competency Rating.

  
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## 8. Guidelines for Managers:

The immediate reporting manager of the employee is the Manager / Appraiser.


- Discuss and approve the Goals of the employee during the start of the PRiSM calendar.
- Review the Performance Goals; and the comments, status and ratings provided by the Employee (make any notations in support or disagreement).
- Provide comments on performance on each Goal that may describe quality and timeliness of work using the evidence accumulated.
- Review each definition of the rating scale thoroughly.
- Rate the performance objective by determining if the Goal was met as set out in the performance agreement considering the performance standards and delivery timeframe
- Rate the Behavioural Competency Section as applicable to identify the competencies of the Employee
- Provide ratings and comments on how the relevant competencies were met
- Review the calculated overall rating derived and key in the comments for the employee's achievements and performance improvement.

## 9. Guidelines for Reviewers:


- Review the Performance Appraisal Form and ensure that the process is managed and prepare for the next level of action in accordance with the requirements of the Performance Management Programme. If there are any discrepancies, provide comments and return to the manager for review and clarification.
- Review the Performance Appraisal Form and ensure that the process is managed and provide the Overall Rating for the employee.
- Provide Comments on the achievements & Performance improvements.
- Submit the form to Human Resources for processing.

Any clarifications on PRiSM feedback can be routed as follows:

- Meet the Reviewer
- Email only to [prism@rvei.edu.in](mailto:prism@rvei.edu.in)

  
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## Goal Management User Manual



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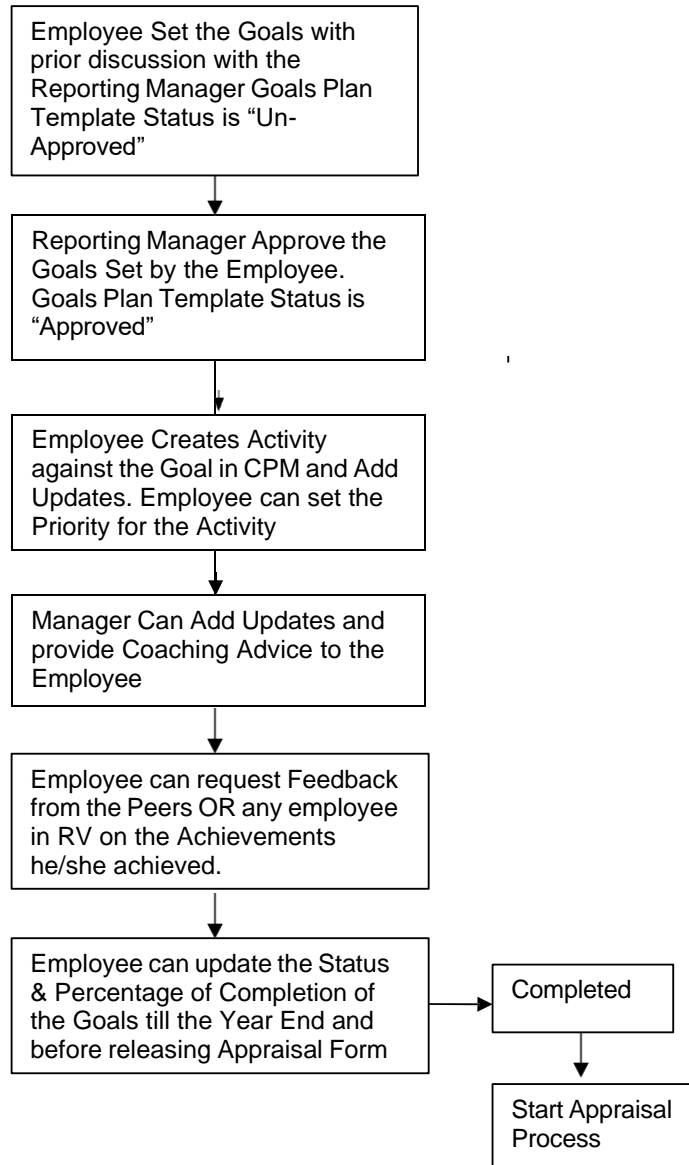
  
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## Goal Management Process Flow

### Goal Management Flow Chart:

Below is a flow diagram that shows the Goal Setting Process in general.



  
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# Goal Management Employee Hand Book

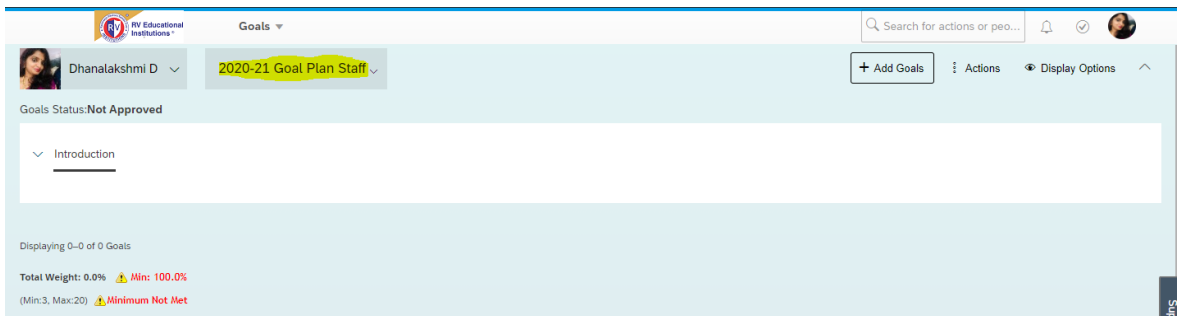
## 1 Goal Setting

### 1.1 Employee Set Goals

#### 1.1.1 Employee Login with his/her User ID & Password and clicks on Goals Tab



URL Link <https://performancemanager10.successfactors.com>  
Company Id [rashtreeya](#)  
User Name [XXXX](#)  
Password [XXXXXXXXX](#)



**Note:** User ID is your four digit employee number in SuccessFactors.

#### 1.1.2 Create New Goals

Click on Add Goal to create a New Goal



You can also choose Goal Wizard to create the Goal



Copy from Other Goal Plan functionality will work if the employee already has previous year's Goal Plans and the same Goals for the current year also.



## Goal Management Employee Hand Book

Once employee copied from the previous Years Goal Plans the Statuses, weightages and other fields will be modified as per the current requirement.

Create a New Goal

Choose what type of goal to add.

+ Personal Goal

Personal Goals allow you to make up your own goal and assign any metrics you want.

+ Library Goal

Library Goals are selected from an organized library with suggested metrics.

Expand "Library Goal" to select the Goal from Goal Library

Select Goal from the Library

Select goal to add from the library. Click the icon to expand categories. You will be able to modify the goal in the next step.

> RVCP Goals

∨ RVDC Goals

<input type="checkbox"/>	Annual plan for chosen domain (academic/research) (timeliness and adherence)	Plan vs actual time of submission and quality of submission
<input checked="" type="checkbox"/>	Classroom time saving due to blended learning outputs (hours)	Number of hours saved
<input type="checkbox"/>	Contribution to faculty development programs	number of initiatives
<input type="checkbox"/>	Coverage of UG - PG students & Doctoral scholars	Number of students and scholars
<input type="checkbox"/>	Coverage of faculty (percentage) in research projects & Collective Royalties received	Amount
<input type="checkbox"/>	Coverage of identified thrust areas for research (Target Vs.. Actual)	Coverage of identified thrust areas for research (Target Vs.. Actual)

Cancel Back Add Selected

Select the Goal from the list of Goals mapped to your Institution and click on "Add Selected".

  
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Add Goals

Edit your goals below.

Fields marked with \* are required.

Visibility:

Category:

\* Goal Name:

\* Metric:

\* Weight:  %

\* Start Date:

\* Due Date:

% Complete:  %

\* Status:

Select Visibility, Category and enter weightage for the Goal  
Enter % of Complete and Status if the Goal is already started and save the changes.  
Enter Weightage for the Goal

Dhanalakshmi D | 2019 Goal Plan Staff | + Add Goal | Actions | Display Options

Goal Status: **Not Approved**

Introduction

Displaying 1-3 of 3 Goals

Total Weight: 100.0% (Min: 3, Max: 20)

Academic										
Visibility	#	Goal Name*	Metric	Weight	Start Date	Due Date	% Complete	Status	CPM Achievements	Action
<input type="checkbox"/>	Public	1.1 My Team (Teachers from my department) <a href="#">Edit</a>	My Team (Teachers from my department)	<div style="width: 40%;">40.0%</div>	01/01/2019	12/31/2019	<div style="width: 0%;">0.0%</div>	Not Started	0	



Always Visibility must be "Public"



Total weightage of all the Goals cannot exceed 100% Minimum weightage of each Goal is 5% and Maximum weightage of each Goal is 40%



Minimum Number Of Goals are 3 and Maximum Number of Goals are 20



Select "Personal Goal" if you want to define your own Goal.

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## 1.2 Manager Approve Goals

### 1.2.1. Manager Login with his/her User ID & Password and clicks on Goals Tab




URL Link <https://performancemanager10.successfactors.com>  
Company Id rashtreeya  
User Name XXXX  
Password XXXXXXXX

The screenshot shows a dashboard with a dark header. The 'To-Do' section contains three tiles: 'Finish Your Profile' (0% Complete, Due Anytime), 'Review Performance' (1 Review, Due Anytime), and 'Approve Requests' (33 Requests). The 'My Team' section contains four tiles: 'Team Absences', 'Team Summary', 'Manage My Team' (highlighted with a red box, showing 82 Reports (82 Direct)), and 'Org Chart' (82 Direct Reports (82 total)). The user profile 'Sarah Abraham (2238)' is visible in the top right.

### 1.2.2. Manage My Team

Manager clicks on “Manage My Team” to select the respective employee and click on “Take Action” tab  
Select “Goal Plan”

  
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# Goal Management Employee Hand Book

The screenshot shows a user interface for goal management. On the left, under 'My Team (82)', a list of team members is shown, with 'Dhanalakshmi D' (Primary Teacher) highlighted in a red box. On the right, the profile for 'Dhanalakshmi D' is displayed, including her role as 'Primary Teacher' and vacation status. A 'Take Action' menu is open, listing various options such as 'Manage Recurring Deductions', 'Add Note', 'Jump To', 'Personal Information', 'Employment Information', 'Compensation Information', 'Talent Profile', 'Provident Fund Details', 'Deputation Details', 'Leave Encashment', 'Pending Requests', and 'Goal Plan', which is highlighted in a green box.

### 1.2.3. Manager Approve the Goals

Manager Clicks on “Approve” to confirm the Goals Set by the Employee

The screenshot displays the 'Goals' management page. At the top, it shows the user 'Dhanalakshmi D' and the '2020-21 Goal Plan Staff'. The 'Goals Status' is 'Not Approved', and an 'Approve' button is highlighted in yellow. Below this, there is an 'Introduction' section. A summary shows 'Displaying 1-3 of 3 Goals' and 'Total Weight: 100.0%' (Min:3, Max:20). Three categories are listed: 'Academic', 'Administration & Management', and 'External Connect', each with the message 'You have no goals in this category.'

  
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## Goal Management Employee Hand Book

Manager can Comment in the Comment Box , if the employee set goals are not satisfied.  
The employee will receive a mail to correct / update the same:

The screenshot shows the 'Goals' section of the system. A goal titled '7.1 Classroom time saving due to blended learning outputs (hours)' is displayed. The goal has a weight of 40.0%, a start date of 07/01/2020, and a due date of 06/30/2021. The status is 'Not Started' with 0% completion. Below the goal details, there is a 'Comments' section with a text input field and 'Cancel' and 'Post' buttons.

After Manager's Approval

The screenshot shows the 'Goals' section after approval. The user is logged in as 'Dhanalakshmi D' and is viewing the '2020-21 Goal Plan Staff'. The 'Goals Status' is 'Approved'. The goal plan template is locked, and the 'Introduction' section is visible. The system displays 'Total Weight: 100.0%' and 'Min:3, Max:20'. The 'Academic' and 'Administration & Management' categories are shown with 'You have no goals in this category'.




Managers can also Add, Delete and Edit Goals



Once Manager Approves the Goals of an employee the Goal Plan Template will be locked.



Two fields “% of Complete” and “Status” will be open even in the locked status so that employee can update till PMGM Admin launches Appraisal Form at the Year End.

  
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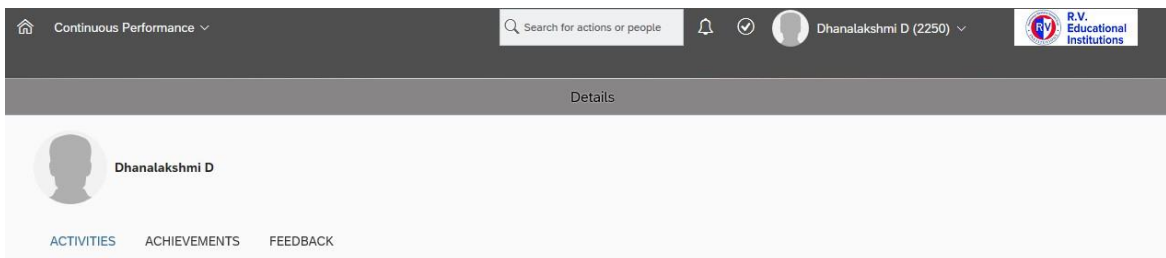
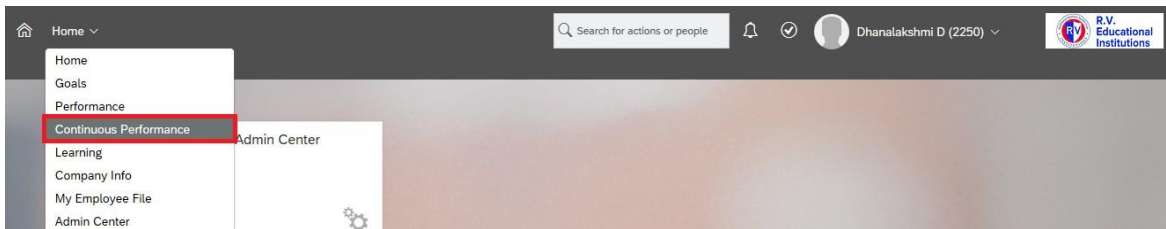


## Goal Management Employee Hand Book

## 2 Continuous Performance Management

### 2.1 Continuous Performance

#### 2.1.1. Employee selects Continuous Performance Tab under Home Page




< July 23, 2019 >

ACTIVITIES  
Please review your activities

Capture Meeting

+ Add Activity

Please click "+ Add Activity" to add Activities.

  
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## Goal Management Employee Hand Book

### 2.1.2. Add Activity

Employee clicks on “Add Activity” Tab to add Activity.

New Activity

**\*Activity Name**  
New Learning Methods

**\*Status**  
High Priority

**Goals**  
Performance Goal  
Teaching strategy (Innovation methods)

[Save](#) [Cancel](#)

Enter Activity Name, Status and Linked to the Goals the Activity it belongs. Click on “Save” Tab.

Dhanalakshmi D

ACTIVITIES   ACHIEVEMENTS   FEEDBACK

< July 23, 2019 > [Capture Meeting](#)

ACTIVITIES  
Please review your activities [+ Add Activity](#)

New Learning Methods [High Priority](#)

Employee can convey the Manager the importance of Activity by setting the Priorities under Status Tab.

### 2.1.3. Add an Update

Employee can Add an Update to the Activity

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# Goal Management Employee Hand Book

**Dhanalakshmi D**

ACTIVITIES   ACHIEVEMENTS   FEEDBACK

< July 23, 2019 > Capture Meeting

ACTIVITIES  
Please review your activities + Add Activity

New Learning Methods High Priority

**Dhanalakshmi D**  
Conducting Online Classes today

## 2.1.4. Manager Add an Update

My Team (82)   Dhanalakshmi D

**Dhanalakshmi D**  
Primary Teacher Take Action

**G Hemalatha Venkatesh**  
Primary Teacher Go to Profile

**GURUSIDDESH U M**  
Vice Principal

Working on **1** activities in total Go to Activities

**New Learning Methods**

Manager selects appropriate employee and clicks on "Go to Activities" Tab

People   Details

**Dhanalakshmi D**  
Primary Teacher

**G Hemalatha Venkatesh**  
Primary Teacher

**Geetha P V**  
Primary Teacher

**Girija R**  
Helper

**Girijamma .**  
Helper

**Gowri Gopinath**  
Librarian

**Dhanalakshmi D**  
Primary Teacher

ACTIVITIES   ACHIEVEMENTS   FEEDBACK

< July 23, 2019 > Capture Meeting

ACTIVITIES  
Please review Dhanalakshmi's activities + Add Activity

New Learning Methods High Priority

**Dhanalakshmi D**  
Conducting Online Classes today

*D. Pandu*  
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## Goal Management Employee Hand Book

### Manager Add an Update

Manager Add an Update interface showing a list of staff members on the left and a detailed view of an activity on the right.

**Staff List:**

- Dhanalakshmi D (Primary Teacher)
- G Hemalatha Venkatesh (Primary Teacher)
- Geetha P V (Primary Teacher)
- Girija R (Helper)
- Girijamma (Helper)
- Gowri Gopinath (Librarian)

**Activity View:**

**Dhanalakshmi D**  
Primary Teacher

ACTIVITIES    ACHIEVEMENTS    FEEDBACK

< July 23, 2019 >    [Capture Meeting](#)

ACTIVITIES  
Please review Dhanalakshmi's activities    + Add Activity

**New Learning Methods**    High Priority

- Dhanalakshmi D  
Conducting Online Classes today
- Sarah Abraham**  
Schedule in the Morning Hours today

### 2.1.5. Manager Add Coaching

Manager Add Coaching interface showing a list of staff members on the left and a detailed coaching form on the right.

**Staff List:**

- Dhanalakshmi D (Primary Teacher)
- G Hemalatha Venkatesh (Primary Teacher)
- Geetha P V (Primary Teacher)
- Girija R (Helper)
- Girijamma (Helper)
- Gowri Gopinath (Librarian)

**Coaching Form:**

**Sarah Abraham**  
Schedule in the Morning Hours today

Other Topics  
Add other topics to discuss during your next 1:1    + Add Topic


Please click "+ Add Topic" to add topics.

**Coaching**  
Provide Feedback for Dhanalakshmi

One thing Dhanalakshmi did well:

One thing Dhanalakshmi needs to improve upon:

Manager can Advise Employee on the Update provided by the Employee against the Activity.

  
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## Goal Management Employee Hand Book

**Dhanalakshmi D**  
Primary Teacher

**G Hemalatha Venkatesh**  
Primary Teacher

**Geetha P V**  
Primary Teacher

**Girija R**  
Helper

**Girijamma .**  
Helper

**Gowri Gopinath**  
Librarian

**Sarah Abraham**  
Schedule in the Morning Hours today

Add an update

Other Topics  
Add other topics to discuss during your next 1:1

+ Add Topic

Please click "+ Add Topic" to add topics.

**Coaching**  
Provide Feedback for Dhanalakshmi

Edit Coaching

One thing Dhanalakshmi did well:  
Online Classes will Helps Weaker Students

One thing Dhanalakshmi needs to improve upon:  
Provide Good Material

### 2.1.6. Employee Creates Achievement

Continuous Performance

Search for actions or people

Dhanalakshmi D (2250)

R.V. Educational Institutions

Details

July 23, 2019

ACTIVITIES  
Please review your activities

New Learning Methods

**Dhanalakshmi D**  
Conducting Online Classes today

**Sarah Abraham**  
Schedule in the Morning Hours today

Capture Meeting

+ Add Activity

Complete

**Create an Achievement**

Congratulations! Turn your completed activity into an achievement to record it as part of your accomplishments for the year

New Learning Methods

Create Achievement Skip

Once the Employee Sets the Activity Status as "Complete" System Prompts to Create "Achievement"

**Dhanalakshmi D**

ACTIVITIES **ACHIEVEMENTS** FEEDBACK

By Time By Goal

+ Add Achievement

July 2019

New Learning Methods

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### 2.1.7. Employee Request Feedback On Achievement

Employee can Request Feedback from Peers, Subordinates and Superiors OR anyone who works along with him/her from the Organization on the Achievement he/she created against to the Activity.

Request Feedback

**i** Once this request is responded to, only you will have access to the feedback message until you decide to make it visible to others

\*From

\*Message

Since we have worked together on New Learning Methods, I'd like to get your feedback. Could you please let me know what you think I did well and provide one constructive suggestion on what I could do better in the future?

Best regards,  
Dhanalakshmi D

Send Cancel

Enter Employee Numbers in the From Column and Enter

  
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## Goal Management Employee Hand Book

**i** Once this request is responded to, only you will have access to the feedback message until you decide to make it visible to others

\*From

Search by name

Sujatha C Veena Aparanji

\*Message

Since we have worked together on New Learning Methods, I'd like to get your feedback. Could you please let me know what you think I did well and provide one constructive suggestion on what I could do better in the future?

Best regards,  
Dhanalakshmi D

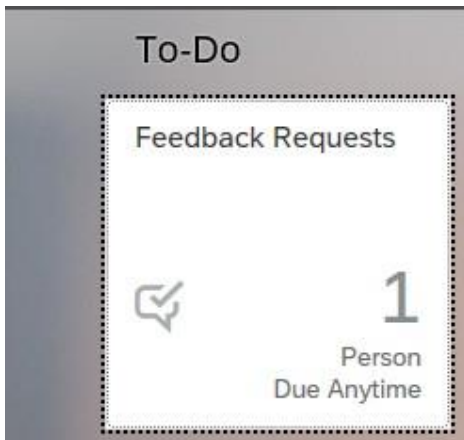
Send

Cancel


Click on Send

### 2.1.8. Provide Feedback

Feedback Request receives to the Requested Employee under To-Do List



Click on "Feedback Request"

  
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## Goal Management Employee Hand Book

### Feedback Requests



**Dhanalakshmi D:** Since we have worked together on New Learning Methods, I'd like to get your feedback. Could you please let me know what ... MORE  
July 23, 2019

Provide Feedback

Decline

Click on Provide Feedback



### Provide Feedback



**Dhanalakshmi D**

Since we have worked together on New Learning Methods, I'd like to get your feedback. Could you please let me know what you think I did well and provide one constructive suggestion on what I could do better in the future?

Best regards,  
Dhanalakshmi D

The feedback you provide will be visible to Dhanalakshmi D

\*Feedback

Nice Classes Helps Weaker Students

Cancel

Send

Enter Feedback and click on "Send" to send the Feedback to the Requestor



Employee can also Decline the Feedback from the Original Requestor

Employee Screen



Dhanalakshmi D

ACTIVITIES   ACHIEVEMENTS   **FEEDBACK**

Request Feedback   View Feedback Requests   Give Feedback

July 2019



**Sujatha C**  
Nice Classes Helps Weaker Students  
July 23, 2019  
 Linked Visible to my manager

Delete



Employee has option to delete the Feedback



Employee has option to make Feedback visible to his/her Manager

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## 2.1.9. Update Goal Status

Dhanalakshmi D | 2019 Goal Plan Staff | Actions | Display Options

Goal Status: **Approved**

Introduction

Displaying 1-3 of 3 Goals

Total Weight: 100.0% (Min:3, Max:20)

Academic

Visibility	#	Goal Name*	Metric	Weight	Start Date	Due Date	% Complete	Status	CPM Achievements	Action
Public		1.1 My Team (Teachers from my department)	My Team (Teachers from my department)	40.0%	01/01/2019	12/31/2019	0.0%	Not Started	0	<a href="#">Edit</a>

Click on Edit

Edit Goal

Edit your goal below.

Fields marked with \* are required.

Visibility: Public

Category: Academic

\* Goal Name\*: My Team (Teachers from my department)

\* Metric: My Team (Teachers from my department)


\* Weight: 40.0%

\* Start Date: 01/01/2019

\* Due Date: 12/31/2019

% Complete: 100.0 %

\* Status: Completed

  
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Update the % Complete and Status Fields.