

PERSONAL GOAL MANAGEMENT

ActiveStrategy Enterprise™ Fact Sheet

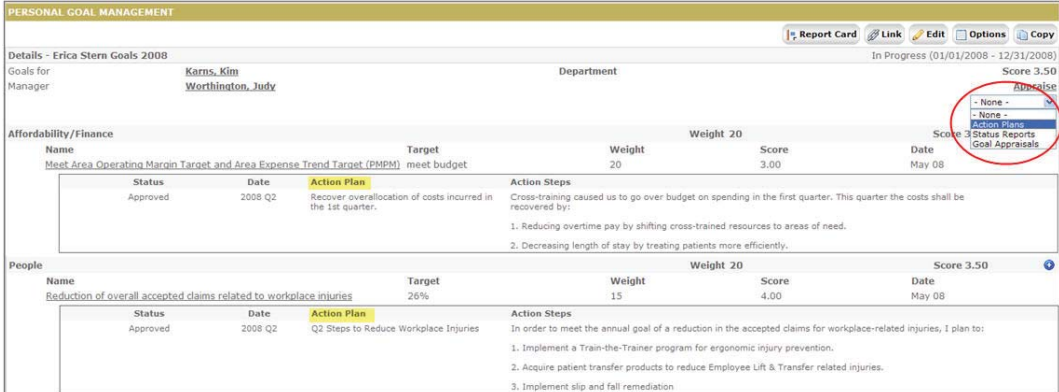
The Personal Goal Management (PGM) module in ActiveStrategy Enterprise (ASE) lets administrators, human resource staff, managers, and users establish personal goal management scorecards (PGM Scorecards) and set personal goals that are commonly factored into year-end employee appraisals.

The best application of the PGM module is as an extension of the organizational Balanced Scorecard functionality. By deriving an individual's personal goals from relevant corporate, division, or department scorecards, the individual-level goal setting and bonus compensation processes become more tightly aligned to the overall corporate strategy. Goals may contain links to Scorecards, Objectives, Measures, Processes, Program Groups, and Initiatives within ASE.

ASE Supports Your Employee Performance Management Style

ActiveStrategy Enterprise supports multiple methods of personal performance management, and is easily customized to meet your organization's management philosophy. Classic performance management allows for an annual appraisal of an individual, based upon the Goals linked to their PGM Scorecard. Employees are responsible for completing Goal Status Reports on a frequency determined by their manager. Employees can self-appraise each individual Goal on their PGM Scorecard, as well as their overall performance.

Another method of managing individual performance supported by ASE aligns individual goals into Themes, which are similar to Perspectives on a Balanced Scorecard. Goals are assigned an annual target, and employees are responsible for developing short-term Action Plans. Action Plans, typically developed for quarterly periods, contain short-term steps designed to reach the annual target for each Goal.



PERSONAL GOAL MANAGEMENT						
Details - Erica Stern Goals 2008						Report Card Link Edit Options Copy
Goals for Manager	Karns, Kim Worthington, Judy	Department			In Progress (01/01/2008 - 12/31/2008)	Score 3.50
Affordability/Finance						
Name	Target	Weight	Weight 20	Score	Date	Score 3.50
Meet Area Operating Margin Target and Area Expense Trend Target (PMPM)	meet budget	20		3.00	May 08	
Status	Date	Action Plan	Action Steps			
Approved	2008 Q2	Recover overallocation of costs incurred in the 1st quarter.	Cross-training caused us to go over budget on spending in the first quarter. This quarter the costs shall be recovered by: <ol style="list-style-type: none"> 1. Reducing overtime pay by shifting cross-trained resources to areas of need. 2. Decreasing length of stay by treating patients more efficiently. 			
People						
Name	Target	Weight	Weight 20	Score	Date	Score 3.50
Reduction of overall accepted claims related to workplace injuries	26%	15		4.00	May 08	
Status	Date	Action Plan	Action Steps			
Approved	2008 Q2	Q2 Steps to Reduce Workplace Injuries	In order to meet the annual goal of a reduction in the accepted claims for workplace-related injuries, I plan to: <ol style="list-style-type: none"> 1. Implement a Train-the-Trainer program for ergonomic injury prevention. 2. Acquire patient transfer products to reduce Employee Lift & Transfer related injuries. 3. Implement slip and fall remediation 			

A drop-down menu allows users to view Status Reports and Action Plans for each goal.

Employees and managers are encouraged to meet on a regular (quarterly) basis to discuss progress, status, and the score for the review (appraisal) period. During the quarterly meeting, employees and managers should not only rate the previous period, but develop the next period's Action Plan. This management philosophy enhances individual performance in many ways: it opens the lines of communication between managers and employees, ensures constant focus on the annual Goal by encouraging regular, short-term plans for how the Goal is going to be met, and provides the ability to not only reassess a Goal's annual target, but also to reevaluate its alignment to the overall organizational strategy.

Developing and setting an annual target without periodic assessments may lead to inaccurate appraisals due to organizational changes, adjustments to overall strategy, or realignment of priorities. By meeting regularly, assessing the Action Plan, and evaluating progress towards the target, managers and employees are more likely to perform the tasks that truly make individual, as well as collective, performance align to the organizational strategy.

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Easy Deployment of PGM Scorecards / Goals

Administrators can easily create a PGM Scorecard or Goal template – or select an existing PGM Scorecard or Goal – and deploy it to the entire company, select departments, or individuals for further refining and deploying.

For instance, a human resources administrator (PGM Admin) can mandate that all employees follow certain corporate guidelines (each established as a Goal with specific measurable targets). Another admin (or PGM Admin) can create a PGM Scorecard and attach those goals under a specified Theme. The PGM Scorecard can then be deployed to division or department leaders, who can add Goals specific to their area, and easily deploy them to their managers. Managers can add personal goals and deploy them to their direct reports or specific individuals within their team.

Effective Management Reporting

Management Reports like the Report Card (new to ASE v7.1) allow managers to view their direct reports' active PGM Scorecard scores, Theme scores, and Goal Appraisal scores on a single page. Administrators may also view any individual's PGM Scorecard appraisals and Report Cards.

PGM REPORT CARD						
Karns, Kim						
	Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08
Karns, Kim Goals 2008	2.13	4.19	3.17	3.85	3.50	3.20
Affordability/Finance	3.00	3.75	3.50	3.75	3.00	4.00
<input checked="" type="checkbox"/> Meet Area Operating Margin Target and Area Expense Trend Target (PMPM)	3.00	3.75	3.50	3.75	3.00	4.00
People	3.63	4.00	2.00	3.75	3.50	3.00
<input checked="" type="checkbox"/> Reduction of overall accepted claims related to workplace injuries	4.00	4.00	2.00	4.00	4.00	3.00
Reduce unprotected sick day usage; continue rollout of UBTs in key departments and increase scope of UBTs	3.25	4.00	0.00	3.50	3.00	3.00
Quality	0.00	4.00	0.00	3.25	3.75	2.00
<input checked="" type="checkbox"/> Implement and maintain medication safety infrastructure	2.75	4.00	0.00	3.25	3.75	2.00
Community	0.00	4.50	0.00	4.25	3.75	3.00
<input checked="" type="checkbox"/> Foster understanding and commitment to Charity Care/Community Benefit program with both internal and external audiences.	4.00	4.50	0.00	4.25	3.75	3.00

Employees and managers can easily change the view of a PGM Scorecard to quickly view the Action Plan, Status Report, or Appraisal for each Goal on the Scorecard.

Next Steps

Email us at info@activestrategy.com for more information or to set up a demo of ActiveStrategy Enterprise's Personal Goal Management module.