Getting started with the SelfStir assessment site

How the 360 Evaluation & Development Program works

1. Register with SelfStir after attending today’s class
2. Create multi-rater survey (includes self-assessment)
3. Invite raters
4. Edit invitation email (optional)
5. Send invitations to raters
6. Wait for raters to complete survey (a reminder will be sent weekly)
7. Attend final session to receive results

Step 1: Register with SelfStir after attending today’s class
Once you attend the orientation session, you will receive an email from Cindy Anderson containing a link to register with SelfStir, the program we’ll be using to complete the 360 evaluation. When you get to the “sign up as a user” page, complete all fields. Note that your username cannot include any spaces.

Once you click on the Submit button, you will see the below page.
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You will receive an automated email to confirm your registration:

Click on the Confirm email command. You will be taken to the user login screen, shown below:

Once you’ve logged in, your personal dashboard page appears. It won’t have much on it yet!

A few helpful tools on the dashboard:

- On the far right-hand side, you can click on a Start Tour command that will give you a quick tour of the various features.
- Near the top of the page, there is a link to a User Guide (PDF) that you can download, as well as a General Help online site.

A few configuration things you may want to do (but all are optional):

- **Edit My Profile:** If you click on this link, you can add additional personal information about yourself, including social media and other contact information, and more career details.
- **Privacy Settings:** by default, everyone taking part in the Albemarle County 360 Evaluation and Development Program has their SelfStir profile marked as Private. This means you are completely invisible to other SelfStir users. If you post on discussion boards or the Knowledge Forum, your username is withheld.
- **Email Notifications:** by default, your account is configured to send you emails when any of the following happens:
  - Someone sends you a message
  - Comments are added to your journal
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- Raters take action on your survey (start, complete, haven’t responded within a week)
- You may or may not want to tinker with these settings, depending on how actively you use SelfStir’s features.

Step 2: Create multi-rater survey (includes self-assessment)

Once you’ve familiarized yourself with the dashboard, you can start your assessment process. The way SelfStir works, you will create a multi-rater assessment, and do your own self-assessment as part of that step.

1. In the Surveys area, click on the **Start a new survey** link at the bottom of the list:

2. On the Select Survey Type page, look for the dropdown box that reads “Select Survey Type” and select **Multi-Rater Survey** from the list.

3. In the “Please describe your current situation” textbox, enter some basic information about your work situation here—size of department/work group, type of work, teams you belong to, etc. A couple of examples:
   - I’m the assistant director of a department with 30 people in it. I have five direct reports and work primarily with staff inside our department.
   - I work in a division of 10 people. I don’t supervise anyone else, but I work closely with peers in two other departments.
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- I’m a supervisor of seven front-line employees in a department of 75 people that is divided into three separate groups.

4. Once you’ve entered your description, click on the Next command.

5. On the Select Competencies page, you’ll see that it is already pre-populated with the County’s five classified employee competencies. All you need to do here is click on the Next button!

On the Survey Start Page, you’ll see a brief description of how the survey is set up.
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Click on the **Start Self-Assessment** command to fill out your personal assessment. The first page of the survey appears with the relevant statements for the Community competency on it. Your work consists of two steps for each competency:

1. You will evaluate yourself on each statement by dragging the orange balloon to the appropriate spot on the scale.
2. At the bottom of the page, add any comments that you would like to make, such as notes on other ways in which you think you’ve worked on improving in this area, or goals you have already set. It’s a good idea to spend some time filling this out completely, so that you document your state of mind, the type of work/projects you’re involved in now, etc. This level of detail will be helpful for you at the end of the process when reviewing rater’s feedback as well as your own self-assessment. (Hint: if you completed a self-assessment as part of your performance appraisal, you might be able to use some of that information here!)

At the bottom of the page, click on the **Save and Continue** command to move to the next competency. Repeat the process of rating yourself and adding comments for each competency. When you’ve completed your self-evaluation for all five competencies, click on the **Complete Survey** command at the bottom of the page.

![Take the Survey](image)

**Step 3: Invite raters**

Once you’ve completed your self-assessment, you are ready to ask others to assess you. On the **Invite Raters** page, you will enter names, emails, and relationship to you into the blank textboxes, then click on the **Add to rater list** link.

<table>
<thead>
<tr>
<th>First name</th>
<th>Last name</th>
<th>Email</th>
<th>Relationship</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lorna</td>
<td>Gerome</td>
<td><a href="mailto:lgerome@albemarl.org">lgerome@albemarl.org</a></td>
<td>Manager</td>
<td>Not yet invited</td>
<td>Delete</td>
</tr>
<tr>
<td>Davra</td>
<td>Miller</td>
<td><a href="mailto:dmiller@albemarl.org">dmiller@albemarl.org</a></td>
<td>Peer</td>
<td>Not yet invited</td>
<td>Delete</td>
</tr>
<tr>
<td>Kim</td>
<td>Schick</td>
<td><a href="mailto:kschick@albemarl.org">kschick@albemarl.org</a></td>
<td>Peer</td>
<td>Not yet invited</td>
<td>Delete</td>
</tr>
<tr>
<td>Louise</td>
<td>Wyatt</td>
<td><a href="mailto:lywatt@albemarl.org">lywatt@albemarl.org</a></td>
<td>Peer</td>
<td>Not yet invited</td>
<td>Delete</td>
</tr>
</tbody>
</table>

![Rater List](image)
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Be sure that you have entered the correct email for each rater. Unlike our internal mail system, SelfStir has no way of autocorrecting if you mistype the address.

If you aren’t certain what a person’s email address is, follow these steps:
1. Open the Outlook Address Book.
2. Enter the person’s name to find him/her on the list.
3. Double-click on the name to open the Properties window.
4. Click on the E-mail Addresses tab and look for the SMTP line (highlighted in yellow below):

![Image of E-mail Addresses tab]

Types of raters you can select:
- **Peer**: employees with whom you work but don’t supervise. You must enter at least three names, and you are strongly encouraged to enter four or more, so that you are ensured enough responses.
- **Manager**: your supervisor(s). You can enter one or more names.
- **Direct report**: employees whom you supervise. You must enter at least three names, and you are strongly encouraged to enter four or more, so that you are ensured enough responses.
- **Other**: other employees who don’t fit into any of the above categories, such as staff in other departments whom you’ve worked with on projects. You must enter at least three names, and you are strongly encouraged to enter four or more, so that you are ensured enough responses.

Notes about rater selection:
- SelfStir has specific criteria about the number of people required to participate in each category, so that rater confidentiality is assured. You can review those requirements in the “Rater Selection Criteria” area.
- We found during the first round of this program that it was better to over-invite raters, so that you are ensured of meeting the minimum criteria for each type of rater. And, of course, the more feedback the better!
- You will increase the likelihood of getting your raters to complete the assessment by having a conversation with them beforehand, to make sure they have the time to complete the assessment and that they understand the importance of writing comments for each competency.
- Raters will be reminded every week to complete their assessment of you.
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If you don’t follow the SelfStir criteria for minimum number of raters for each type, you’ll get an error message similar to the one shown below:

![Error Message]

You cannot proceed with the process until you have invited the correct minimum number of raters.

**Step 4: Edit invitation email (optional)**

Once you have entered all of your raters, you can draft a personalized message to be included in the email that SelfStir sends to each rater. Click into the blank textbox below the complete list of raters, and enter whatever text you want to include in the email invitation. You have the option to see what your invitation will look like by clicking on the **Preview Invitation** link below the textbox.

**Note:** be sure that you have ALL of your raters in there before writing your email message, because the message gets deleted if you go back and add more raters.

This step is not required; a screenshot of the generic text is included below to help you decide if you want to write something more personal. Here’s what an edited email looks like:

![Edited Email]

Here’s what the generic email looks like:

![Generic Email]

**Step 5: Send invitations to raters**

After entering raters and your email message, click on the **Send Invitations** command.
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Depending on the browser you’re using, you may see a pop-up window asking if you’re sure you want to send the invitation (the wording may vary!). Click on the OK or Yes command to complete the invitation process.

Your work is done for now; you just have to wait for your raters to complete their surveys!

Once the invitations have been sent, the Status column for each rater will update to show if the rater has started, completed, or rejected a survey.

A few more things to know about your raters:

- Raters will be reminded every week to complete their assessments.
- If you change your mind about one of the raters, you can delete that person as long as she or he hasn’t started the survey. If you click on the Delete command in the Action column on the far right-hand side, the rater receives an email letting her or him know that the request to take the survey has been withdrawn.
- Once a rater starts, completes, or rejects the survey, you will not be able to delete that rater.