Directions to Administer the Feedback Survey Tool

To access your Qualtrics account:

- Click the link below, then click on the "log in" button on the left of the screen http://www.it.cornell.edu/services/surveys/
- If you have not created a Qualtrics account, please do so by following the steps at the website.
- In your shared "shared with me" folder you should have a survey titled "People Leader and Stakeholder Feedback"
- **This is a shared template and cannot be edited/or distributed to others in your organization.** To distribute or edit the survey you must make a copy of the survey for your organization.

How to set-up a Performance Dialogue Evaluation survey for your direct reports

1. Once you have logged into Qualtrics, click on the **Shared-with-Me** icon on the top left side of your screen.

2. Locate the document titled "People Leader and Stakeholder feedback" **You must make a copy of this document.** On the right side of the screen, under **Project options (the three dots),** click the drop-down icon **(…)** and make a copy of the document and then rename it (e.g. "People Leader Feedback for XYZ Dept" or "Stakeholder Feedback for XYZ Dept").

   NOTE: some users receive an error message when they make a copy. If this occurs, refresh your browser screen and the error goes away and the copied survey appears.

   You have now created a new survey tool that is confidential, and only you have access to view the results. You will **not be able** to edit the original survey, only the copy.

3. Open the survey you just created and go to the question, "Name: Please select the name of the employee you are providing feedback for from the drop-down list below," and enter the names of your direct reports.

4. No other edits should be made to the survey!

5. Once all of the names of your direct reports have been added, go to the top right of the page and click the blue **Preview Survey** button to preview the survey which will open in a new browser tab. When your review is complete, close the preview web browser tab. You will be returned to the survey.

6. Once you've completed your review process, click the blue publish button on the top right of the page, you will then see a pop up screen and you must click publish in the bottom right of the pop up screen to make your survey active

7. To send your survey, click the **Distributions** tab at the top of the page. To distribute the survey via the Qualtrics email feature select email on the right side of the page and then ("Compose Email") OR if you prefer to send through your Outlook email ("Anonymous link"). If you use your Outlook email, an anonymous survey link is provided that you will want to make a copy of to enter into the email that you will send to survey respondents.

8. Click on the XM symbol in the top left of your screen which will bring you back to the main page where you can confirm the status of your survey. Your survey's status should indicate it is **Active**. You will be able to view the number of responses at any time, until the survey is closed.

9. Below is a suggested email you may send to the survey respondents. If you are sending the email directly through Qualtrics, you will not include a link to the survey in your email. The highlighted items will need to be changed prior to sending out the email.

   In the Subject line of the email, write: Feedback for "First and Last Name"

   Sample Email Invitation

   Good day,
   I am beginning the process of performance reviews for my team and am contacting you regarding "first and last name's" work and interactions with you over the past year. My goal is to gain confidential and constructive feedback from several clients, colleagues and direct reports to give them a well-rounded assessment of their performance so that they can be as successful as possible. To this end, I would very much appreciate it if you would take 10-15 minutes to fill out a brief assessment (**INCLUDE THE FOLLOWING ONLY IF SENDING THE SURVEY THROUGH YOUR OUTLOOK EMAIL**: that can be accessed at the following web address: "paste in survey link".) When you enter the assessment you will see a drop down list of names, please select the name of the individual who you are providing feedback for so that we may appropriately correlate the assessment.

   The feedback you provide will be kept anonymous and will be reported to them aggregated with other feedback. The assessment will close on **DATE.**

   Thank you in advance for your input, it is greatly appreciated.
   Sincerely,
   xxx

10. To close the survey, from the drop down to the right of the survey click **Close**. If you're ready to view the final survey report, please close the survey before running the report.

Report Generation Instructions

<u>Reports can be run at any time as needed to check on responses</u>

This report has feedback from the People Leader's direct reports and peers, clients, customers, etc.

1. Log in to Qualtrics
2. Find your Survey and click the “Results” icon at the top of your survey.
3. Add the appropriate filter for searching for feedback on your People Leader
    - Click “add filter” (next to the blue default report button)
    - Select the “Name: Please select the name of the employee you are providing feedback” question.
    - Select Operator “is”
    - Select Operand “ name of the appropriate employee”
4. Click the “Share Report” icon on the right, and select “Word Document” from the drop-down.
5. Click “Word document” and then hit the blue “Export Pages” at the bottom of that pop-up.
6. From the next pop-up, click “download”.
7. Edit as needed (Add title or name, delete tables you don’t need, adjust formatting and save).