SDC RIO MODEL

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This paper aims to introduce a system that would allow evaluating SDC in-house atmosphere health.

The criteria for the system are:

- Use as much available system data as possible;
- Consider team member's manager's opinion;
- Consider team member's colleagues' opinions;
- Consider team member's involvement in projects;
- Consider team members' personal characteristics.

While seeking solutions, the SDC management team conducted various research and eventually came up with a custom-built evaluation system called RIO Model.

RIO Model

RIO Model allows evaluation of in-house team members per three parameters:

1. **R**esponsibility
2. **I**nvolvement
3. **O**pinion

Note: All the metrics are being calculated automatically, and require minimal effort from the management.
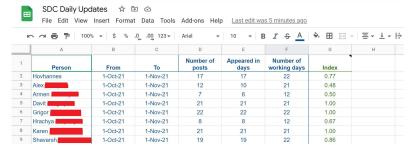
Responsibility evaluation

The system counts daily updates provided by each team member within a month (per the Armenian calendar) in the #daily_updates Slack channel (ID: CU9NTN4F8). The data is being pushed from that channel to the SDC Daily Updates google sheet.
Based on the ratio between the number of working days and the submitted updates, the system calculates the Responsibility Index (decimal number), where the minimum is 0.0 and the maximum is 1.0. The higher the index =, the better.
For example, if Wolf Alexanyan has submitted 11 daily status updates, whereas there are 22 working days in a given month, his Responsibility Index will be 0.5.
The system also considers SDC Vacation Calendar to exclude days when a team member is on vacation or day off. For example, if Wolf Alexanyan has submitted 11 daily status updates, whereas there are 22 working days in a given month, but he has taken 2 day-offs and 8 days was off due to vacation, then his Responsibility index will be 1.0.
The system also excludes the official non-working days per the country's law.

This metric allows SDC management to understand the level of responsibility of a particular team member and help him/her increase it per need. Recommended minimal value for this index is 0.95.

Involvement evaluation

Here we count SDC team members' involvement in the company projects. To do this, the system counts the average number of members' available working capacity and its changes in time (historical data). The source for this data is the SDC Resources document. This document is being updated on a weekly basis by the higher management. The document is being snapshotted and saved on Google Drive each week, which gives us the ability to go through the historical data.
The workload table looks like this:

Suppose Wolf Alexanyan worked at the SDC for three months. This gives us 12 weeks, and thus, 12 workload sheets data. The system sums all 12 values from Wolf Alexanyan's "available capacity" column and divides it into 12. Then the system subtracts the result from 100 and converts it to index, where the minimum is 0.0, and the maximum is 1.0. Higher index = higher workload.

By writing "0%" we indicate that the person at some point worked on that project. On top of it, we leave a comment on that field to know exactly what the person was doing there.
This metric allows SDC management to understand how effectively a particular team member's workload is being managed. The idea is to avoid the situation where the team member will be bored because s/he doesn't have tasks, as well as avoid the opposite situation, where there are too many things assigned to the colleague.
Recommended minimal value for this index is 0.7.

Opinion evaluation

Here the system considers peoples' opinions about each other. In addition to data-driven evaluation of the SDC team members, the system considers two types of opinions about a particular team member: his/her team leads, and the opinion of colleagues with who the person worked. The opinions are being collected via surveys every six months. The survey forms are being sent based on the peoples' overlapping involvement in the project in accordance with the historical data from the SDC Resources document. The logic is as follows:
The system has the date of when a particular SDC team member has joined the company. The system also has the date of their last evaluation. The system counts six months from the last evaluation and notifies the HR team to conduct an Opinion evaluation. Once the HR team member selects the person who should be reviewed, the system checks the selected person's data from the SDC Resources document and finds all the people that simultaneously worked with this person on the same project in the last six months. In addition, the system filters people who worked with the selected person on a given project each week for the last six weeks (0% involvement also counted). Then, the list of recipients is being formed, and the forms are being sent.

There is a survey for team members and another one that is being sent to the team leads of a person who is being reviewed.

> ℹ️ **Team members' survey form example:**
>
> This survey aims to give an objective assessment of your cooperation with% team_member% over the last %num% months. Your responses will enable us to assemble more effective, consistent teams and enhance your experience at SDC.
> The results will be seen only to the company's higher management, and with nobody else.
>
> **How easy-going is %team_member% in work?** [1 - (Not easy-going at all) 2 - (Sometimes it is hard to communicate.) 3 - (Communication could be better.) 4 - (Satisfactory. Not much to improve.) 5 - (Very easy-going.)]
>
> **How responsive is %team_member% in work?** [1 - (Not responsive at all. Unable to work with.) 2 - (Very poor response rate. Must be improved asap.) 3 - (Poor response rate. Often leads to problems.) 4 - (Good response rate. Enough to work efficiently) 5 - (Very responsive)]
>
> **How supportive is %team_member% in work?** [1 - (Not supportive at all) 2 - (Does not support enough.) 3 - (Could be more supportive.) 4 - (Satisfactory. Not much to improve.) 5 - (Very supportive)]
>
> **What do you think about your overall experience of working with %team_member%?** [1 - (Don't want to work again) 2 - (Will work with him/her only if there is no choice.) 3 - (It was okay. A person has a lot to improve.) 4 - (Satisfactory. Will work again.) 5 - (Will be happy to work together again)]
>
> Each of the above four points should be converted to an index with the lowest value of 0.0 and the highest of 1.0. On top of it, the system should count team members' opinion index based on those 4 indexes given that each one of those has the same weight. Team members' opinion index should have the lowest value of 0.0 and the highest of 1.0.
>
> At the bottom of the survey, the system should show a multiline text input field with the label "Additional notes". This entity should not affect the index score.

> ℹ️ **Manager's survey example:**
>
> This survey aims to give an objective assessment of your cooperation with% team_member% over the last %num% months. Your responses will enable us to assemble more effective, consistent teams and enhance your experience at SDC.
>
> **How easy-going is %team_member% in work?** [1 - (Not easy-going at all) 2 - (Sometimes it is hard to communicate.) 3 - (Communication could be better.) 4 - (Satisfactory. Not much to improve.) 5 - (Very easy-going.)]
>
> **How responsive is %team_member% in work?** [1 - (Not responsive at all. Unable to work with.) 2 - (Very poor response rate. Must be improved asap.) 3 - (Poor response rate. Often leads to problems.) 4 - (Good response rate. Enough to work efficiently) 5 - (Very responsive)]
>
> **How supportive is %team_member% in work?** [1 - (Not supportive at all) 2 - (Does not support enough.) 3 - (Could be more supportive.) 4 - (Satisfactory. Not much to improve.) 5 - (Very supportive)]
>
> **What do you think about your overall experience of working with %team_member%?** [1 - (Don't want to work again) 2 - (Will work with him/her only if there is no choice.) 3 - (It was okay. A person has a lot to improve.) 4 - (Satisfactory. Will work again.) 5 - (Will be happy to work together again)]

How well %team_member% works with deadlines (any)? [1 - (Does not meet deadlines at all.) 2 - (Very poor work with deadlines. Has to be significantly improved.) 3 - (Poor work with deadlines. Has to be improved.) 4 - (Satisfactory. Not much to improve.) 5 (Always meets deadlines.)]

What's your overall opinion about %team_member%'s professional skills? [(Not skilled at all) 1 - 2 - 3 - 4 - (Have barely sufficient skills.) 5 - 6 - 7 - 8 - 9 - 10 (Highly skilled, top marks.)]

Each of the above five points should be converted to an index with the lowest value of 0.0 and the highest of 1.0. On top of it, the system should count the manager's opinion index based on those 4 indexes given that each one of those has the same weight. Manager's opinion index should have the lowest value of 0.0 and the highest of 1.0.

At the bottom of the survey, the system should show a multiline text input field with the label "Additional notes". This entity should not affect the index score.
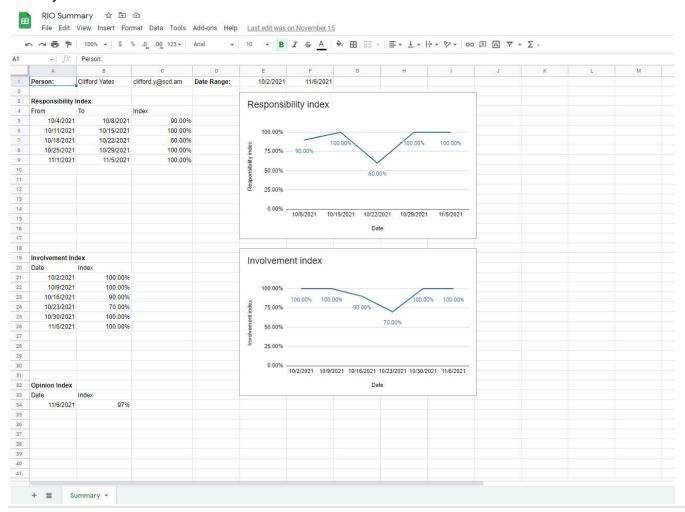
Opinion Index

To count the opinion final index the system should take the team member's opinion index and the manager's opinion index, and count the final opinion index given that the team members' opinion has 25% weight whereas the manager's opinion has 75%.

O (opinion) setup

The colleague who is being reviewed: Clifford Yates

Team Members' Review

	1. How easy-going is the person in work?	2. How responsive is the person in work?	3. How supportive is the person in work?	4.-What do you think about your overall experience of working with the person?	Additional notes	Overall Index
Jack Daniels	5	4	5	5		
Misty Patton	5	5	5	5		
Todd Willis	5	5	5	5		
Total Score	1.00	0.93	1.00	1.00		0.98

Managers' Review

	1. How easy-going is the person in work?	2. How responsive is the person in work?	3. How supportive is the person in work?	4.-What do you think about your overall experience of working with the person?	5. How well the person works with deadlines (any)?	6. What's your overall opinion about the person's professional skills?	Additional notes	Overall Index
Preston Carpenter	5	5	5	5	4	9	He has some important things to work on, but overall the progress is good so far. He is very responsible person and don't ever complains about any task :)	
Total Score	1.00	1.00	1.00	1.00	0.80	0.90		0.95

Opinion Index	0.96

The final opinion index should have the lowest value of 0.0 and the highest of 1.0.

Recommended minimal value for this index is 0.8.

Summary board:

RIO Summary

	A	B	C	D	E	F
1	Person:	Clifford Yates	clifford.y@scd.am	Date Range:	10/2/2021	11/6/2021
3	Responsibility Index					
4	From	To	Index			
5	10/4/2021	10/8/2021	90.00%			
6	10/11/2021	10/15/2021	100.00%			
7	10/18/2021	10/22/2021	60.00%			
8	10/25/2021	10/29/2021	100.00%			
9	11/1/2021	11/5/2021	100.00%			

Responsibility index (chart)

19	Involvement Index		
20	Date	Index	
21	10/2/2021	100.00%	
22	10/9/2021	100.00%	
23	10/16/2021	90.00%	
24	10/23/2021	70.00%	
25	10/30/2021	100.00%	
26	11/6/2021	100.00%	

Involvement index (chart)

32	Opinion Index	
33	Date	Index
34	11/6/2021	97%

Summary

Expected outcome (random examples)

Name: Jack Daniels

Date range: January 1st - April 1st

Responsibility: 0.72

Involvement: 0.92

Opinion: 0.89

Assumption: Given that the overall opinion about the team member is positive, and his involvement in the company projects is high, maybe his lack of time management skills results in low responsibility index.

Actions: We may talk to him about daily status updates, and suggest ways how to add those into his working routine with the lowest context-switch risks.

Name: Kurt Cobain

Date range: February 1st - June 1st

Responsibility: 1.0

Involvement: 1.0

Opinion: 0.67

Assumption: Even though Kurt didn't miss any daily status updates and he was always assigned to some projects, still his colleagues' opinion about him is pretty bad.

Actions: We should dig into opinion surveys, and see what's the biggest complaint about him. We should understand if it's about his professional skills or personality-specific something.

Name: Mac Miller

Date range: August 1st - October 1st

Responsibility: 1.0

Involvement: 0.38

Assumption: Mac has high responsibility index, but he wasn't involved in projects too much. He had a lot of free time, and maybe he worked only on a single project. As for the low opinion index, we can't make decisions based on it due to the low involvement of Mac in the projects.

Actions: Correct our mismanagement, and find a way to increase the load on Mac for the next quarter. Also, we could make one on ones with people who worked with him to understand the roots of the low opinion index.