



DEPARTMENT OF HUMAN RESOURCES
PERFORMANCE MANAGEMENT SYSTEM
IMPLEMENTATION
TEAM CHARTER & SCOPE OF WORK



DRAFT

REVISED DATE: 7/26/2012 6:20 PM

Big journeys begin with small steps...

Project Title: Performance Management System Implementation (PMSI) Project	
Team Lead Name(s):	1. Omar C. Reid, Executive Sponsor 2. Noel Pinnock, Project Manager 3. Art Haller, Executive Consultant 4. Janet McCown, Subject Matter Expert 5. Robbin Duplessis, Subject Matter Expert 6. Richard Feehan, Subject Matter Expert 7. Pat Smith, Training Expert 8. Carolyn Jackson, Training Lead 9. Linda Porter, Training Advisor 10. Leslie Denton-Roach, Communications Lead 11. Modeane Walker, Ph.D., Technical Expert 12. Scott Ward, Technical Expert 13. Chevelle Wilson, HRIS Liaison 14. Dyanne Marks, Client Relations Expert 15. Valda DeWitt, Client Relations Expert 16. Farshid Amini, IT Expert 17. Diana Poor, HPD Liaison 18. Toya Ramirez, Council Liaison 19. Kelly Shreck, Employee/Labor Relations Expert
Stakeholder(s):	<ul style="list-style-type: none"> • City of Houston Residents • Mayor • City Council • Department Directors • E.B. Cape Center Board of Governors • Labor Management Cooperation Council • Houston Organization of Public Employees (HOPE) • Houston Police Department Union • Houston Fire Department Union • Managers & Supervisors • Front Line Employees
Team Construct:	<p>The Performance Management System Implementation (PMSI) Team is comprised of employees from across the city that has been strategically selected to support the successful implementation of the city's new performance management system. Each member of the team is dedicated to this project and will adjust work schedules and priorities to meet the expectations as outlined in this team charter, scope of work, and supplemental project plan.</p>



DEPARTMENT OF HUMAN RESOURCES
PERFORMANCE MANAGEMENT SYSTEM
IMPLEMENTATION
TEAM CHARTER & SCOPE OF WORK



Background:	The current employee performance evaluation system has been used by the City for nearly two decades to evaluate its workforce job performance (i.e., knowledge, skills, and abilities). The current system has served its purpose; however, significant process enhancements are needed to support the City in achieving a culture that recognizes and motivates its workforce to meet and/or exceed desired expectations.
Mission:	The mission of the Performance Management System Project team is to implement a citywide performance management process and application across all departments in collaboration with city stakeholders and internal customers, addressing its impact on workforce productivity, efficiency, and service delivery.
Guiding Principles:	<p>The guiding principles for this project is to deploy a Performance Management System that will:</p> <ol style="list-style-type: none"> 1. Educate employees on the new process and future application; 2. Establish SMART (i.e., specific, measurable, attainable, relevant/reliable, and timely) performance measures, expectations and developmental opportunities; 3. Align performance plans with departmental strategic goals and objectives; 4. Promote ongoing feedback between the employee and supervisor; and 5. Keep the performance management process simple and positive.
Goals & Objectives:	<p><u>Goal 1. Improve employee performance</u></p> <ul style="list-style-type: none"> • <u>Objective 1.</u> Improve information related to employee performance through maintaining a central repository of all information relative to employee’s productivity. • <u>Objective 2.</u> Improve communication between employee and supervisor through standardize reporting guidelines. • <u>Objective 3.</u> Increase interaction between employee and supervisor by providing role-security access to an online performance management application. <p><u>Goal 2. Improve management efficiency</u></p> <ul style="list-style-type: none"> • <u>Objective 1.</u> Re-engineer business processes associated with collecting and maintaining employee performance information to streamline and refine city policies and procedures. • <u>Objective 2.</u> Ensure effective citywide acceptance and utilization of the new performance management system by providing employees and other stakeholders the opportunity to participate, add value, and assist along the implementation lifecycle. <p><u>Goal 3. Create a positive city culture</u></p> <ul style="list-style-type: none"> • <u>Objective 1.</u> Provide timely communication to city stakeholders in efforts to manage expectations and strategically disseminate information relative to critical updates during the implementation lifecycle to ensure cohesiveness and buy-in. • <u>Objective 2.</u> Deliver training aligned with all functional and program areas, which will equip and prepare employees in effectively executing their roles and responsibilities in the new performance management system.



DEPARTMENT OF HUMAN RESOURCES
PERFORMANCE MANAGEMENT SYSTEM
IMPLEMENTATION
TEAM CHARTER & SCOPE OF WORK



	<ul style="list-style-type: none"> • Objective 3. Facilitate and analyze surveys to address employees' needs post implementation to celebrate successes and evaluate lessons learned.
<p>Communication/ Change Management:</p>	<p>The key element to successfully implement a project of this magnitude is proactive communication. Communication will be disseminated top-down with executive leadership and support that will ultimately inform the audiences to accept and embrace the new process and technology. In addition, Change Management is essential to maintain employee and stakeholder expectations in order to mitigate any negative impact of change on employees and other stakeholders.</p>
<p>Phased Implementation:</p>	<p>Phase 1: (Planning) Policy Re-engineering & Training Development</p> <ul style="list-style-type: none"> • Phase 1 establishes the direction and focus of the entire project. Project leaders will develop detail work plans, task assignments, schedules and expected deliverables for the project's implementation lifecycle. <ol style="list-style-type: none"> 1. Project Plan. To develop a living project plan that will incorporate all elements of the Performance Management (PM) System implementation lifecycle. 2. Charters. To develop a team charter outlining team expectations. <p>Phase 2: (Preparation) Training Deployment (Managers & Supervisors)</p> <ul style="list-style-type: none"> • Phase 2 is purposed to identify current business processes, procedures, and practices. <ol style="list-style-type: none"> 1. Business Process Re-engineering (BPR). Document the "As-Is" (current) business processes, which will then be analyzed to determine how they could be improved or eliminated. The end product will be to document the "To-Be" (future) business processes. 2. Project Leadership. Update senior executives on the PM System implementation progress as well as receive input and direction on a regular basis. 3. Executive Summaries. Apprise the Mayor of the progress of the PM System implementation. 4. Webpage. Develop and maintain the project webpage to provide accurate information regarding the implementation lifecycle. 5. Training Strategy. To provide training in functional areas. Training endeavors will continue through the go-live phase. <p>Phase 3: Go-live & Completion</p> <ul style="list-style-type: none"> • Phase 3 is purposed to deploy the new PM system and provide just-in-time training to basic end-users and refresher training for managers and supervisors. <ol style="list-style-type: none"> 1. Requirements Gathering. Develop technical requirements that address functional needs. 2. Application Selection. Select the PM System application platform. 3. Configure & Test. Configure and test application for functionality flaws.



DEPARTMENT OF HUMAN RESOURCES
PERFORMANCE MANAGEMENT SYSTEM
IMPLEMENTATION
TEAM CHARTER & SCOPE OF WORK



	<ol style="list-style-type: none"> 4. Train. Provide just-in-time training. 5. Deploy. Deploy functionality, monitor system performance, troubleshoot, and optimize (tuning and tweaking).
Constraints:	<ol style="list-style-type: none"> 1. Time Conflicts 2. Resource Commitment 3. Unattended Consequences 4. Technology Uncertainties
Required Resources	<ol style="list-style-type: none"> 1. Wo/Manpower 2. Methods 3. Materials 4. Machines 5. Money
Deliverable(s)	<ol style="list-style-type: none"> 1. Project Plan 2. New Performance Management System Brand & Logo 3. Training Material 4. Communications (Memos, Videos, Webpage, Emails, Posters, etc.) 5. Executive Summary 6. Project Webpage 7. Roadmap 8. PowerPoint Presentations (For Roadshow Purposes) 9. Application Deployment
Due Date:	<ul style="list-style-type: none"> • Implementation (Part I) – Functional & Training Deployment (November 31, 2012) • Implementation (Part II) – Technical Deployment (TBD)