# Project Description/Issue Statement (may include project triggers):

Redesign the performance management process and system for OSU IT and the Controller’s Office within the broader context of the OSU Talent Management Initiative (TMI). This pilot will inform a University wide Talent Management implementation in the coming future.

# Goals & Objectives:

## Strategic Goal(s) Supported

A systematized and cohesive approach to talent management at OSU has been identified as a priority in OSU’s Strategic Initiative 4.0 (SP 4.0)

## Business Objectives

The goals of OSU’s talent management initiative (TMI) is to build a systematic approach to talent management that addresses the full employment life cycle to advance the mission of OSU by better attracting, developing and retaining talented faculty, staff and graduate assistants.

## IT Objectives

Obtain and implement a performance management system to be used for the duration of the pilot.

# Project Governance

|  |  |
| --- | --- |
| Role | Name/Org |
| Project Sponsor | Cathy Hasenpflug, Andrea Ballinger, & Heidi Sann |
| Project Manager | Dan Hough |

# Project Scope:

|  |  |  |
| --- | --- | --- |
| Scope | In | Out |
| Functional | Create and implement an equitable and balanced performance management system and process. Will include other areas of the TMI only if tied to performance management. | Will not include the other areas of the Talent Management Initiative.  |
| Organizational | Professional Faculty and Classified employees in OSU IT and Controller’s Units | All other units outside of OSU IT and Controller’s Unit’s. Will not include academic faculty |
| System |  |  |
| *All other Scope* |  |  |

# Flexibility Matrix:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Least Flexible | Moderately Flexible | Most Flexible |
| Scope | X |  |  |
| Schedule |  |  | X |
| Resources |  | X |  |

# Key Project Deliverables

Acquire system to be used for performance management

Develop accurate and fair employee performance ratings

Create a standardized evaluation process and support tools for managers and employees

Create a process that supports employee performance improvement and links performance to development goals

Capability to tie employee performance goals to employee development goals, creating a holistic approach to development and career planning

Easily accessible training resources

Tracking of ongoing coaching and performance conversations between employees and managers

Capability to provide peer feedback, both formally (through tools such as 360 Feedback) and informally (through social and collaborative networking tools

# *Preliminary* Schedule and Milestones:

|  |  |
| --- | --- |
| Milestone | Date (mm/yy) |
| Project organization | 10/20 |
| Campus requirements gathering | 12/20 |
| Business process design | 01/21 |
| System/vendor selection | 02/21 |
| Configuration | 04/21 |
| Integrations, design, build, test | 05/21 |
| Training & Pilot development | 06/21 |
| Pilot Deployment | 07/21 |
| Review & Evaluation | 07/22 |

# Staffing Estimates

|  |  |  |
| --- | --- | --- |
| Role | Effort | Name/Org |
| Sponsors | 5% | HR, OSU IT, Controller’s Units |
| DFA PPMO | 5% | Heather Riney, DFA PPMO |
| Project Manager | 40% | Dan Hough, DFA PPMP |
| UIT Representative | 15% | Scott Emery, UIT |
| OSU IT Representative | 10% | Terralyn Vandetta, Forestry Computing Resources |
| UIT Representative | 10% | Alex Crimin, UIT |
| HR Strategic Partner | 15% | Jared Haddock, HR |
| HR Information Systems Representative | 10% | Michelle Harrell-Oechies, HR |
| HR Training Development | 10% | Kristen Magis, HR |
| HR Employee & Labor Relations | 10% | Trina Young, HR |
| HR Class & Compensation | 10% | Lisa Lindner, HR |
| Controller’s Representative | 10% | Aracely Arrendondo, Controller’s Units |
| Controller’s Representative | 10% | Renee Lyon, Controller’s, Units |

# Service

|  |  |
| --- | --- |
| Item | Name/Org |
| Owner (when project completes) | HRIS |

# Financial Estimate (opt.)

|  |  |
| --- | --- |
| Total Costs | Dollars |
| Initial Cost of Project |  |
| Ongoing Annual Cost |  |
| Total Benefits | Dollars |
| One-time Savings |  |
| Annual Savings |  |

## Funding Source

Initial Costs:

Ongoing Costs:

## Benefit Description (e.g. revenue increase)

# Dependencies, Assumptions and Constraints

Cloud based software can be implemented for pilot duration and population

# Project Performance Measures (opt)

# Known Issues and Risks (of proposal)

Standalone performance management solutions may be difficult to obtain as many are part of a larger integrated talent management suite.

New process is met with resistance or change fatigue.

Initial timeline and resources may be too limited for implementing a new IT solution.

General note…doesn’t have to be just one page.

1. Project Description/Issue Statement
Summarize the project and business problems to be solved.
2. Goals & Objectives
Describe the major goals and objectives of the project from both a business perspective and an IT perspective, if relevant. [Note: clarify language that business objectives should be in terms of capabilities needed – not assets/IT language, etc]
3. Project Governance

List the individuals assigned in directing the project

1. Project Scope
Describe what is in and out of scope from a functional (boundaries around what the solution does), organizational (who is affected) and systems (which systems or infrastructure is involved) perspective.
2. Flexibility Matrix
Assess where the flexibility will reside for the project to react to uncertainty as the portfolio is created. The assessment is relative between the three factors.
3. Key Project Deliverables
List deliverables for the project in terms of business and process capabilities rather than *in terms of changes to particular applications/assets*.
4. Preliminary Schedule and Milestones
List the anticipated start and end dates of the project. Include dates of required interim milestones as appropriate.
5. Staffing estimates
List the estimated roles and % FTE required to complete the project (e.g 50% DBA, 10% web programmer).
6. Service
Enter the proposed long-term owner of the delivered solution when the project completes.
7. Financial Estimate (summary of cost-benefit analysis)

Under Total Costs, list the expected cost to deploy the project (include software, hardware, vendor costs, training, travel, marketing, etc.). List the expected annual cost to maintain the delivered solution (include maintenance fees, service costs, renewals, additional staffing, etc.)

Under Total Benefits, list the expected income or recovery costs (people, hardware, software renewals, additional fees, etc.)

Under Funding source, list the index/account, grant name or organization to provide funding

1. Dependencies, Assumptions, and Constraints
List related project deliverables, important assumptions made, and imposed constraints. Note if the project's benefits are dependent on other project delivery dates, business projects/events or seasonal trends (e.g., in time for back-to-school).
2. Issues and Risks
Document any anticipated issues and risks with the project that should be considered during portfolio planning.