

**Performance Management Process  
Team**

**Project Charter Summary**

**Situation Analysis**

The University has recently implemented a new Total Compensation System that includes pay, benefits, and rewards. The current performance management approach used by the University varies from department to department. To support internal equity across compensation decisions, the University needs a comprehensive and consistent approach for various work areas to evaluate employee contributions, appropriately rewarding and recognizing effective performance through a standardized, objective process. Compensation under this new system will be more clearly linked to employee performance.

**Purpose Statement**

Review and redesign the University of Richmond's Performance Management System to increase employee engagement, proficiency, and productivity, to better align with University goals, and to integrate with the compensation system and reward and recognition programs. See the following website for information on the University's goals:

[http://president.richmond.edu/board/Mission\\_Statement.htm](http://president.richmond.edu/board/Mission_Statement.htm) and at  
<http://oncampus.richmond.edu/planning/executive%20summary.pdf>

**Objectives**

- Design a performance management process that will foster employees' professional health and well-being, strengthen proficiencies in the workplace, and encourage increasing productivity at all levels.
- Align the recommended performance management process with the mission, goals and philosophy of University
- Review and identify the relevant best practices in performance management
- Include best use of technology
- Provide regular progress reports to sponsor, President, and his cabinet
- Team presents project recommendations for process to Human Resources
- Team members use sound project management skills and team effectiveness skills to achieve project objectives and final outcomes

**Deliverables**

- Design and recommend a performance management process that improves consistency, continuity, equity and alignment across the University
- Incorporate relevant best practices in performance management into the recommended process
- Design a tool to support the process that can be flexible enough to adapt to different work areas and positions
- Use team's knowledge developed from the project to inform the development and implementation of both communication and training plans

- Serve as advocates for redesigned Performance Management Process during the pilot project and final implementation

### **Scope**

Work on the Performance Management Process will link with other significant human resource systems, including compensation, recognition, and other related processes. The project team will report progress to the project sponsor and the sponsor will update President and his cabinet during each phase of the project. Final recommendations will be developed and submitted to the project sponsor. No fiscal budget is anticipated for the team's project but may be recommended if applicable; however, the team will receive support from Human Resource Services for meeting locations and times required to achieve the project goals within the targeted time frames. The team will consult with Human Resource Services staff, including but not limited to, the HR staff member included on the team. The team will consult with other performance management experts and research best practices, all while appropriately representing the scope of the assigned project and the mission of the University to anyone who may be contacted to provide information for the team's work.

### **Cross-functional Project Team Members**

- Sponsor: Carl Sorensen
- Facilitator: Valerie Wallen (charter & team training)
- HR consultant: Laura Dietrick
- Team members (manager and employee from each work area listed below):
  - 3 Directors (direct report to VPs) – Troy Boroughs, Louis Love, Juliette Landphair
  - Facilities – Susie Reid, Ann Taylor
  - Dining – Michelle Taylor
  - Advancement – Shawn Morrison
  - Provost & Schools – Susan Taylor, Libbie Geiger, Denise Jones
  - Student Dev. – Charm Bullard, Patrick Benner
  - Athletics – Andy Platt

### **Success Criteria**

Redesigned performance management process will:

- Identify and support professional development opportunities to enhance performance
- Focus on results and behaviors, rather than activities
- Ensure alignment with overall goals of the University
- Follow a systems-based approach while looking at specific performance outcomes
- Ensure equitable and fair treatment to employees based on performance. "Fair and equitable" is defined as clearly and accurately measuring performance for all employees, aligning employee performance expectations with goals by setting clear performance goals and providing consistent feedback on performance.