Project Charter

2012-F-03-Taylor: Performance Appraisal Software Evaluation

Executive Summary
Per the Personnel Issues Implementation plan approved by the Executive Management Team on 1/11/12, UT Libraries will implement “16.11.1: The centerpiece of the new annual review process will be a web-based electronic evaluation form that enables supervisor and employee to meet as needed to ensure progress toward organizational and individual goals.”

This project is to look into purchasing a third-party software package to manage the annual review/performance appraisal process for UT Libraries. Purchasing a third-party software package will save UT Libraries from having to build and maintain the software required for 1) the creation of electronic evaluations and 2) the workflow management associated with the routing and approving of the evaluations.

Business Need and Background
Implementation of an electronic evaluation form was a recommendation of the Personnel Issues Working Group and is required per the implementation plan. It is anticipated that implementing an electronic evaluation system should make completing evaluations easier for staff and the routing and approving of evaluations much easier and faster for supervisors and UT Libraries Human Resources.

Project Description
Although we plan on purchasing a third-party software package, we request assistance from DPOC with the evaluation of the systems requirements/specs of these third-party software products. We anticipate that the software packages we will consider for purchase will be hosted on vendor servers, and as such we will primarily need assistance with the evaluation of vendor server security from Library Systems and software accessibility from TIS. If a software package we evaluate requires hosting on UT Libraries servers then we would need assistance with the evaluation of the systems requirements for the software and the staff issues associated with locally-hosted software.

Project Goals
A web-based electronic evaluation form that enables supervisor and employee to meet as needed to ensure progress toward organizational and individual goals.

Schedule and Milestones

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<thead>
<tr>
<th>Milestone/Deliverable</th>
<th>Target Date</th>
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<tr>
<td>Determine if other schools, departments, or UT Austin HR has a solution</td>
<td>1 month</td>
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Evaluate potential applications
Procure a suitable solution or explore in-house development

**Scope**
HR employee evaluation application.

**In Scope**
Applications which cost less than $20,000.

**Out of Scope**
Probably in-house development will not be undertaken, and if it is required then a separate software development project needs to be started to evaluate the costs.

**Project Management and Governance**

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<tr>
<th>Role</th>
<th>Name(s)/Title(s)</th>
<th>Responsibilities</th>
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<tr>
<td>AD Sponsor(s)</td>
<td>Fred Heath</td>
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<tr>
<td>Project Manager</td>
<td>Meredith Taylor</td>
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<td>Project Team</td>
<td>Meredith Taylor</td>
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<td>Jennifer Heath</td>
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<td>Stakeholder(s)</td>
<td>UT Libraries Staff</td>
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**Project Facilities and Resources**
HR expertise.

**Impact Analysis**
The following units and personnel will be impacted by this project: HR, Supervisors, and all UT Staff.

**Assumptions**
A cloud based solution is ideal.

**Constraints**

**Risks**
Changes to UT Austin or UT System requirements will invalidate the choice.