| **STEP** | **ESTIMATED DATE** | **COMMENTS** |
| --- | --- | --- |
| **1: Project planning, kickoff, and data gathering** |  |  |
| * Pre-planning meetings with Project Managers, Chief Organizational Development Officer & Director of HR (3 calls so far) | 🗸 |  |
| * Call with Performance Management Committee (PMC) to discuss research findings | 🗸 | Completed 1/24 |
| * Document request and review; receive information from Metro | 🗸 |  |
| * Prepare agendas and other materials for on-site meetings and send to Metro | 🗸 |  |
| * Site visit #1 (Paula and Lorraine) * Kickoff meeting with PMC; develop initial list of core competencies * Kickoff meeting with Executive Director, Project Managers, Leadership Team * Leadership team and Sr. Library Managers interviews * Employee communication meetings + focus groups (4) | 🗸 | Completed 2/27 – 2/28 |
| **2: Communications** |  |  |
| * Employee letter | 🗸 | Initial project update emailed/ posted week of 3/6; biweekly updates to follow |
| * Study hotline: [Metrosingerstudy@singergrp.com](mailto:Metrosingerstudy@singergrp.com) | 🗸 |  |
| **3: Survey development, launch, and analysis** |  |  |
| * Develop survey for all employees; coordinate with Lorraine and the compensation survey * Initial draft of PM survey * Review by HR/OD * Pilot and test survey * Launch survey to all staff * Survey closes 3/24/17 | 🗸 | Target = 3/15 launch; 3/24 close |
| **4: Survey results analysis** |  |  |
| * Compile and analyze survey results | 🗸 |  |
| * Share findings with staff – post Survey Monkey PPT on project site | 🗸 |  |
| **5: Develop and define core and management competencies and preliminary design** |  |  |
| * Develop and define competencies based on survey findings; draft preliminary PM design | 🗸 | Behavioral indicators to be developed after competencies and definitions are finalized with the PMC and Library leadership |
| * Conference call with HR/OD to discuss competencies and PM design | 🗸 |  |
| * Revise based on HR/OD input | 🗸 |  |
| * Conference calls with PMC and Library Leadership to discuss competencies and preliminary design | May 15/22 |  |
| * Revise based on PMC/Leadership input | May 15/22 |  |
| * Build behavioral indicators | May 22 |  |
| * Share behavioral indicators with HR/OD via email | June 12 |  |
| * Revise based on input | June 19 |  |
| * Share competencies with PMC via email | June 26 |  |
| * HR/OD to collect PMC feedback and share | July 3 |  |
| * Call with Library Leadership (if needed) to discuss PMC recommendations | July 10 |  |
| * Revise competencies based on PMC input | July 10 |  |
| * Finalize | July 10 |  |
| **6: Performance management system design validation and development** |  |  |
| * Finalize design based on PMC and Leadership input | May 22 | * HR/OD * Leadership * PMC * Leadership, if substantial revisions |
| * Identify focus group participants | May 22 | Two groups of 8 – 10 non-managerial employees; one group of managers |
| * Determine meeting time and send communication/invitations | May 22/29 |  |
| * Plan focus group sessions; prepare agendas and other materials and send to Metro; revise | May 29 |  |
| * Share PM program design documents with focus group participants | June 12 |  |
| * Conduct focus group | June 12 | Three virtual sessions |
| * Share focus group findings and program revision recommendations to PMC | June 19 |  |
| * Finalize design | June 19 |  |
| * Schedule meetings for final program review and approval, including focus group | June 19 |  |
| **8: Performance management program development** |  |  |
| * Develop draft program and supporting documents:   + Forms     - 1:1     - Annual review     - Self-evaluation     - Process guide     - FAQ     - 1:1 guide/prep guide     - Quick reference card (if needed)     - Goal worksheet for development of SMART goals | May/June | Finalize drafts by July 1 |
| * Consult with Lorraine/CPC re link of PM to pay | May/June |  |
| **9: PM Program final review and approval** |  |  |
| * Conference call to share drafts with HR/OD | July 3 |  |
| * Conference calls to share drafts with Leadership and PMC | July 10 | Share via email? |
| * Revise documents based on feedback | July 17 |  |
| * Prepare agendas and other materials for focus groups and send to Metro; revise | July 17 |  |
| * Conduct virtual session with focus groups (session #2), to review and test program | July 24 | Same focus groups |
| * Revise program materials based on focus group input | July 31 |  |
| * On-site visit #2: Share revised program with PMC and Leadership | TBD | Coordinate with delivery of compensation program |
| * Complete final revisions | TBD |  |
| * Develop and submit final program and supporting documents | TBD |  |
| **10: PM Program follow up** |  |  |
| * Communication/implementation | TBD |  |
| * Training | TBD |  |
| * Plan follow up as needed for phased program, training, or other support | TBD |  |
| **Project Status Reports** | Bi-weekly or as needed |  |