SAMPLE PROJECT SCOPE PLAN

**Onboarding Workgroup Project Scope Plan**

**Project Scope:**

Research onboarding practices at University of California, Study benchmark comparable organizations (public universities and state institutions) and identify best practices.  For purposes of this project, onboarding consists of pre-hire practices, compliance issues, logistics and resources required, and establishing the community connection.

**Project Deliverables:**

Recommend general onboarding best practices and clarify local Staff Assembly's role in the process.

**High-Level Project Plan:**

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| Clarify scope and deliverables of the CUCSA Onboarding Work Group   * Team defines project and scope * Obtain CUCSA leadership approval * Meet with UCOP HR reps to understand focus and timeline of their project * Agree on project plan | October |
| Research onboarding best practices and procedures   * Identify components of an onboarding process (September) | November |
| Compile and assess current onboarding practices at UC campuses   * Contact CUCSA reps for campus onboarding contacts (October) * Create a checklist to assess current practices (October) * Create an interview guide (October) * Draft presentation for December CUCSA meeting (November) * Review UCOP and UCR NEO programs (December) * Conduct follow-up interviews with contacts (January) | January |
| Survey UC staff regarding their onboarding experiences at UC campuses   * Ask local Staff Assemblies for use of their listservs (October) * Draft a survey questionnaire (November) * Obtain input from delegates on survey content (December) * Work with EDO to create online survey (January) * Administer survey via SA listservs (February) | February |
| Research practices of other Universities and public institutions   * Explore HR resources (CLC & Interchange Group) (December) * Identify 2 – 3 comparable universities and institutions (January) * Review online resources that are provided (January) * Reach out to external HR contacts (February) * Draft presentation for March CUCSA meeting (February) | February |
| Craft an optimal UC onboarding process, based on research and survey results | April |
| Identify ways that Staff Assembly can assist with onboarding new employees | May |
| Determine how best to distribute and market the recommended process | May |
| Draft final report and presentation for June CUCSA meeting | May |