***OCTOBER 2ND MEETING AGENDA***

**From:** Mathis, Rejeana   
**Sent:** Wednesday, October 01, 2014 10:00 PM  
**To:** Janna LeBlanc <jannal@engr.ucr.edu>; Michael Luttrell <mjluttre@ucsc.edu>; Corell, Rachel <rcorell@volunteer.ucla.edu>  
**Subject:** Onboarding Work Group Con-Call Agenda - October 2, 2014, 8:30am - 9:30am

Hi Team,

Here's the agenda for Thursday's con-call and a few items for discussion.  Please let me know if you have any questions.

***Rejeana***

Rejeana R. Mathis

**October 2, 2014, 8:30am – 9:30am**

**Meeting Instructions:**

**1. Dial-In:**

    - United States: **1-866-740-1260**

2. Enter **Access Code: 4593921#**

3. Agenda

        Review, revise and agree upon the project plan

        Review and edit the compiled onboarding components checklist

        Discuss employee survey questions and agree on the format

        Approve delegate solicitation email

        Review presentation format

        Next Steps

4. Attachments: Draft Project Plan, Compiled Onboarding Components, Delegate Solicitation, 2013 Work Group Presentation

5. Participants

*CUCSA Onboarding Work Group Members*

Janna LeBlanc, Assistant Director of Human Resources in the Central Personnel Services Unit, UC Riverside

Michael Lutrell, Conference Coordinator and Student Supervisor for Conference Services, UC Santa Cruz

Rejeana Mathis (Chair), Management Development Coordinator in Campus Human Resources, UCLA

Rochelle Niccolls, Academic Personnel Program Manager, UC Berkeley

***OCTOBER 2ND MEETING MINUTES FOLLOW-UP EMAIL – INCLUDING AGREEMENTS AND ASSIGNMENTS***

**From:** Mathis, Rejeana   
**Sent:** Thursday, October 02, 2014 4:22 PM  
**To:** Mathis, Rejeana <rmathis@chr.ucla.edu>; Janna LeBlanc <jannal@engr.ucr.edu>; Michael Luttrell <mjluttre@ucsc.edu>; Rochelle Niccolls (niccolls@berkeley.edu) (niccolls@berkeley.edu) <niccolls@berkeley.edu>  
**Subject:** CUCSA Onboarding 10.2.14 Meeting Minutes

Hi Folks,

It was nice speaking with you all, this morning.

**Notes from 10/2 CUCSA Onboarding (OB) Work Group Con-Call**

The team revised the project plan to allow more time for surveying staff and agreed to edit the competency list to include a column to identify ownership of a activity.  Since these are working documents, the team will continue to improve upon them in subsequent meetings.

Action Items:     Update the project plan and competency list (Rejeana)

                                Contact CUCSA delegates regarding their local OB contacts and inform of the upcoming survey (Rejeana) 

                                Contact the OB contact for our perspective campuses and use the competencies checklist to assess our campus’ materials (All)

                                Review and amend the draft OB contact interview questions (below)     (All)

                                Compile the employee survey questions into one document (Rochelle)

                                Craft Staff Assembly related questions to include in the employee survey (Michael)

**Next Conference Call**

October 16th, 8:30 – 9:30

1-866-740-1260, Access code: 4593921

During this meeting, we will discuss the results of our campus research, including how well the competency checklist work.  We also agree to craft an interview guide for follow-up with OB contacts.  Finally, we will assign campus contacts and review the updated survey questionnaire.

Please let me know if you have any questions or I’ve left out any critical information.

Be Well,

***Rejeana***

* CHR Training and Development
* Staff Assembly

        University of California, Los Angeles

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***FEBRUARY 24th MEETING AGENDA***

**From:** Mathis, Rejeana   
**Sent:** Monday, February 23, 2015 4:42 PM  
**To:** Janna LeBlanc; Michael Luttrell; Rochelle Niccolls  
**Cc:** Mathis, Rejeana <rmathis@chr.ucla.edu>  
**Subject:** Onboarding Work Group Con-Call Agenda - February 24th, 8:30 - 9:30

Hi Team,

Here’s the agenda for tomorrow’s con-call.  Have a good evening.

 Best,

***Rejeana***

Rejeana R. Mathis 

**February 24, 2015 – 8:30am – 9:30am - Meeting Instructions:**

**1. Dial-In:**

    - United States: **1-866-740-1260**

2. Enter **Access Code: 4593921#**

 3. Agenda

·         Update on campus contacts

·         Discuss preliminary analysis of assigned interview questions

                                                 Q1 – 6 (Rochelle)

                                                Q7 – 9 (Jana)

                                                Q10 – 12 (Rejeana)

                                                Q13 – 14 (Michael)

·         Review survey responses – (Attached and uploaded onto SharePoint)

·         Update on contact with benchmark organizations

·         Discuss March CUCSA presentation

·         Review progress against project plan and confirm next steps

4. Attachments: N/A

5. Participants

*CUCSA Onboarding Work Group Members*

Janna LeBlanc, Assistant Director of Human Resources in the Central Personnel Services Unit, UCRiverside

Michael Lutrell, Conference Coordinator and Student Supervisor for Conference Services, UC Santa Cruz

Rejeana Mathis (Chair), Management Development Coordinator in Campus Human Resources, UCLA

Rochelle Niccolls, Academic Personnel Program Manager, UC Berkeley

***FEBRUARY 24th MEETING MINUTES FOLLOW-UP EMAIL – INCL. AGREEMENTS AND ASSIGNMENTS***

**Notes from 2/24 CUCSA Onboarding (OB) Work Group Con-Call**

* Update on campus contacts

   No response or additional info from UCSF or UCI.  Will mention during March presentation and enlist additional assistance from delegates.

* Discuss preliminary analysis of assigned interview questions

As expected, there are a lot of inconsistencies across the campuses.  Health Systems process are typically robust.  Many campuses are doing well with regards to compliance and are less attentive to helping establish the campus connection.  The summaries for questions Q7 – Q12 will be revised to follow Rochelle’s format (brief summary and sorted list of campus responses).

* Review survey responses – (Attached and uploaded onto SharePoint)

Received 119 responses.  A few campuses had very low response rates. Therefore, the survey will be reopened with a March 6th deadline.  We will look at overall themes and sort the data by campus. Early analysis indicates Staff Assembly has an opportunity to increase its’ visibility during the onboarding process.

* Update on contact with benchmark organizations

Contacts have responded and preliminary dialogue has begun.

* Discuss March CUCSA presentation

Open with a quick recap of project background, review interview themes (summary, then bullets), and review preliminary survey responses.

* Review progress against project plan and confirm next steps

Action Items:     Revise questions summary format to mimic Rochelle and save to shared drive (Jana and Rejeana)

                                Draft PowerPoint slides for designated questions and send to Michael (All)

                                Complete campus summary paragraph and save to shared drive (Rejeana)

                                Reopen onboarding survey, with March 6th deadline (Lina)

**Next Meeting: UC Merced, Whoo-hoo!**

**Next Conference Call: March 19th, 8:30am – 9:30am**

1-866-740-1260, Access code: 4593921

During this meeting, we will debrief any CUCSA feedback and plan next steps.

Please let me know if you have any questions or I’ve left out any critical information. See you in December!

Be Well,

***Rejeana***