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 |