

Staff Workforce Planning Template

*This form should be used in conjunction with the **Staff Workforce Planning Guidelines**.*

Step 1a: Determine if and how work done onsite, remote or a blend of both aligns with your unit’s mission, objectives, services, and service hours.

Determining the strategic direction for your workforce model involves understanding your unit’s mission, objectives, services and service hours, and how the workforce should be aligned to achieve them.

<p>What are your unit’s mission, objectives, services and service hours? Are there any student experience, client or key stakeholder considerations? Could a workforce that is onsite, remote, or blend of both support those needs?</p>	
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Step 1b: Forecast your workforce needs to meet the unit’s mission, objectives, services and service hours.

Based on the above, assess if and how a Hybrid Workforce Model might address those needs.

Projected Workforce				
Based on key unit objectives and services, what is the appropriate workforce composition?	# and % of Staff Fully Onsite <i>(regular work is onsite)</i>	# and % of Staff Both Onsite and Remote <i>(regular work is both onsite and remote)</i>	# and % of Staff Fully Remote <i>(regular work is remote)</i>	
List working titles of jobs that can effectively work in each designated workplace. <i>Large units may attach a spreadsheet breaking out titles and % of time onsite, remote, or both.</i>	Fully Onsite	3+ days Onsite	1-2 days Onsite	Fully Remote
What are the benefits and challenges of this Hybrid Workforce Model?	Benefits		Challenges	

How will you address any challenges of a Hybrid Workforce Model?	
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Step 2: Rethink staff's work schedules and use of onsite space.

If your future state Workforce Model includes staff working both onsite and remote:

- 1) Complete a Staff Remote Work Criteria Checklist for each staff member eligible for partially or fully remote work.
- 2) Identify how to stagger staff work schedules in order to leverage the use of office space, and
- 3) Note that staff and leaders must sign a UCI Remote Work Agreement for all partial and fully remote employees. Refer to [UCI Remote Work Guidelines](#) for the agreement and remote work information.

Blended Workforce	For staff not 100% onsite, indicate names and schedules. Schedules may need to be rotated and updated to maintain equity. <i>Large units can attach spreadsheet.</i>						
	Monday	Tuesday	Wednesday	Thursday	Friday	Sat	Sun
	Flexible Schedule (Describe below)						
Co-working Spaces Onsite	Based upon staff work schedule:						
	• How many offices/workstations do you currently have?						
	• How many offices/workstations can now be shared?						
	• How many hoteling workspaces are needed that are not assigned to specific employees?						
Technologies and Conference Rooms to support Hybrid Model	<ul style="list-style-type: none"> What new or different technologies are needed to effectively support a hybrid workforce? <i>Refer to: Tech Guidelines/Suggestions for Hybrid Work Ready Conference and Huddle Rooms - Google Docs</i> Do you have access to Smart Conference Rooms to ensure strong collaboration and communications? 						

Step 3: For those leaders planning a hybrid workforce model, reimagine the employee experience and how to adapt as a leader.

Leaders need to be intentional about how to build and maintain a collaborative and inclusive work environment regardless of where staff are working.

Team Collaboration and Communication	What specific practices will you use to ensure the entire team collaborates and communicates?
Inclusion and Connectivity	What specific practices will you use to ensure all staff feel welcomed, engaged, valued and are treated equitably?
Team Resource Optimization	Are there processes, systems, tools, equipment or training that could further enhance team performance in a Hybrid Workforce Model?
Leadership	What specific steps will you intentionally take to ensure you are effectively managing and leading in a Hybrid Workforce Model?
	How will you address performance issues if you identify concerns with a remote worker?

Step 4: Plan your logistics and communications approach to bringing staff onsite.

Plan detailed and coordinated communications to staff and others to ensure that messaging is consistent and clear.

Briefly describe the approach you will take to bringing staff onsite (timing, phases, etc.)	
What key messages need to be communicated about the Hybrid Workforce Model?	
What stakeholders need to hear the message(s)? <i>(i.e., Staff, Faculty, Students, others in Schools/Units who interact with your School/Unit)</i>	
Who will deliver the message(s)?	
How will the message(s) be delivered? <i>Tip: Important messages are best delivered in-person (or via Zoom)</i>	
When will the message(s) be delivered?	

Review and Approvals	Electronic Signature & Date
Document submitted by:	
Staff Workforce Project Manager Review by:	
Departmental or Local HR Review by:	
Plan approved by (Dean, VC or Chief):	

Approved with following modifications:

Approved Plans should be kept with Staff Workforce Planning Project Manager and departmental HR. Coordinate communications and timeline with Project Manager and departmental HR.