

CUCSA Quarterly Meeting Spring 2016

March 2-4, 2016

UC Santa Barbara

Wednesday, 3/2/2016

CUCSA Business

- Change in agenda: Regent Lozano will not be able to attend. Dwaine Duckett will be the speaker in her place on Tuesday, 3/3/16
- Feedback on the retirement task force report was submitted to the President and we have not heard back from her. We will have a meeting next week and we will put this on the agenda.
- Elections will take place at the next meeting for Chair Elect and Secretary.
 - o Please ask current leaders any questions you may have.
 - o We need one person to volunteer to be the elections coordinator by the end of this meeting.
 - Suya Colorado Caldwell has volunteered to be the Elections Coordinator
 - o Nominations due by 4/15
 - o Candidate statements due by 5/15
- In January, several CUCSA delegates attended a meeting at UCOP on the topic of wellness (included Mike, Greta, Rejeana and Erica).
 - o Discussion was about the different initiatives that are happening at the various campuses.
 - o How can we make UC the healthiest university system to work?
 - What more can we do?
- Discussion Topic – Adding CUCSA Alumni officially to at least the first meeting of the year. Create a funding model, etc. Alumni delegate would serve for continuity, sharing past work, etc. Thoughts?
 - o Why can't the host campus Alumni delegate attend the meetings each time to avoid the travel costs?
 - o It seems that the leadership structure and the delegate structure allows for continuity in the organization.
 - o Change is sometimes necessary and what worked several years back may not necessarily work now.
 - o If there is an alumni delegate that wants to see change, then they should work to join CUCSA again.
 - o As a rep at the meeting they wouldn't be able to participate in making change for the organization anyway. They would just be there as an observer.

- Discussion Topic – discussion on the disability program at UCSC. Who else is having these discussions on their campus?
 - o One topic in particular that is discussed is paid family leave.
 - o Another topic brought up is supplemental disability.
- Discussion Topic – mandatory training on line; how do you deal with folks who do not work on a computer regularly?
 - o Some request waivers for those titles where the training does not apply.
 - o Some have special programs that help to consolidate training to meet the needs of the individual campus.
 - o Some campuses reserve conference rooms to allow people who don't have access to computers to do so in these specific rooms.

Engagement Survey Discussion

- Each campus is asked to create an action plan to say how they are planning to address the key drivers from the engagement survey.
- UCSB – since the roll-out, they are having regular meetings with HR and reps from all their campus staff groups. What they hope to work on:
 - o years of service celebration,
 - o release time to volunteer,
 - o mandatory supervisory training,
 - o more staff for HR
- UCB – work regularly with their CHRO; results were on the web via a YouTube video; not a lot of feedback but 1600 views on the video and results; CHRO is working with Learning and Development on changes in training or new training; there will be a staff voice in changes that are being made
- UCI – after their town hall, had smaller group meetings to create their action items; thinking of creating focus groups to solicit feedback
- UCSF – message went out from their chancellor on the results; going to follow the same course of action that they used last time that resulted in the excellent results on this year's survey
- UCLA – presented their results through several methods and to reach various groups of people on their campus; will conduct all staff training needs assessment; will review results with their new Vice Chancellor of Administration; continue their pilot programs such as their supervisory training program where they have supervisors that go through a training and then reach out to other supervisors in specific areas so that they can then do peer training; looking at the supervisory training curriculum; want to focus on staff engagement in their newsletter, etc.
- LBNL – not a lot of support from their leadership; their results are not a surprise; they are asked not to discuss the CUCSA survey any more because they will be conducting their own survey; they will then compare the survey

- results from the two surveys; they believe there will be more traction with their new survey because their leaders are engaged in the process.
- UCD – had a rough start working with the CHRO; chancellor has been very engaged; areas we are focusing on through task forces: supervisory training specifically the accountability of supervisors on their support of staff, communications on campus within the University – created a campus communications council and chancellor has committed to funding an internal communications team, campus will continue to look at career development, task force on pay for performance.
 - UCR – they did not get the turnout both in person and online that they had hoped for; discussion topics, Career Tracks, pay for performance, enhancing staff development programs, information on Staff Assembly; they get the feeling that administration thinks they are addressing everything that was brought up in the survey
 - UCSD – no town hall but are actively talking about the results; they are going to do an idea wave which is basically a crowd sourcing process where you throw out ideas and people can then go in and make comments, they hope to do this in the spring to address awards and recognition and other topics.
 - UCSC – decided not to do a town hall; instead they are having small group discussions; taking feedback and ideas from these discussions to see if there is anything actionable that their local assembly can take on and to forward those items that need to be addressed by the administration; suggesting a “thank you” campaign.
 - UCOP – not a lot of traction since their fall town hall; they selected their four areas of focus but the COO did not send out the information to all staff as was originally discussed so they are stalled at this point in time. In the interim SA is doing what they can such as their “thank you” program which is an on-line opportunity for staff to say thank you to others.
 - UCM – they had 48% turnout at their event; key drivers are communication, change management and performance management, will have webinars to follow-up on these issues; CHRO was at the event and talked about performance management; did not do a live feed because wanted people to actually attend the event; will do innovation awards and will use the key drivers as part of the criteria (Good idea!)

Staff Advisors to the Regents Presentation

- Accomplishments
 - o Reminding the President that staff should be included on systemwide task forces and this has been successful.
 - o Getting a committee on bullying and abusive behavior
 - o Close relationship with the faculty regents
- Challenges
 - o Not getting included in board activities; getting worse and not better.
 - Still not on presidential searches
 - Still not included in closed sessions

- Hot Topics
 - Statement of Intolerance (at March Regents Meeting)
 - Retirement Options (at March Regents Meeting)
 - Faculty is unhappy about the deal made in the Committee of Two and want to give back the money.
 - We want to make sure there is no differential benefit; everyone gets the same thing.
 - Performance Based Merits
 - Some campuses are more ready than others.
 - Disparity in how departments/campuses are managing the merit process; this is causing inequities
 - Inequity between represented and non-represented
 - Not everyone has the technology needed to make this happen.
 - Not everyone does performance appraisals.
 - Prevention of Abusive Conduct
 - Enrollment growth
 - No mention of increasing staff in pace with enrollment growth
 - Investment Portfolio
 - Campus Budgeting
 - Wellness Program

Workgroup Time and Presentations

Internal Operations

- 2015 IO Progress
 - Talent Management and Retention
 - Diversity Initiative
 - CUCSA Outreach and Marketing
 - Bylaws
 - Best Practices
 - EDO Report
- Talent Management and Professional Development
 - Importance on
 - Climate
 - Retention
 - Productivity/Efficiency
 - General well being and happiness
 - Created a graphic representation of staff retention
- CUCSA, Assemblies and Diversity
 - Collecting demographic data on the membership of the staff assembly executive boards
 - 80% responded
 - as it relates to age, SAECs track with campus
 - as it relates to years of service, SAECs track pretty close with campus

- as it relates to gender, we also track
 - As it relates to race/ethnicity, we do not track well.
 - Difficult to determine if the board tracks with the percentage of staff in administrative units.
 - This was difficult to track/determine
- Outreach and Marketing
 - We have ordered CUCSA branded sticky notes
 - We need to keep talking about CUCSA
 - Are we doing all we can to engage local assemblies
 - Talking points simplified
- Best Practice Sharing
 - Should we try something new for the delegate dinner?
 - The dinner by nature has become increasingly expensive.
 - It can be challenging for everyone to interact with each other in a formal tabled atmosphere.
 - Could we be more effective with pizza or sandwiches in a less formal atmosphere with a speed dating type of aspect?
 - We would like to survey the delegation.
- Bylaws
 - The bylaws were reviewed for accuracy
 - Recommendation is that there is nothing to change for this year.
- EDO Updates
 - Regular duties
 - New Projects
 - CUCSA Archiving Process
 - Website Information and folders
 - SharePoint
 - Reports and Misc Information
 - Guidelines for planning a conference
 - CUCSA Marketing Workgroup 2013/2014
 - Working with leadership to incorporate website recommendations
 - CUCSA Editorial Calendar

Health and Wellness

- Presented recommendations
 - Workgroup presented to CUCSA 12/15
 - Leadership submitted proposal to president 1/16
- Prepared information to support recommendation
 - Attended UC wellness planning meeting 1/16
 - Gathered data 2/16
- Recommendation overview
 - Reallocate existing funding to local campuses
 - Hire at least one wellness coordinator (1fte) at each location
 - Identify a wellness champion at UCOP

- Solicit chancellor commitment locally and encourage staff/faculty participation in leadership roles
- Healthy Workplaces Can Make an Impact
 - Healthy work culture
 - worksite health benefits
- Cost of health care can decrease with addition of workplace health and wellness program
- ROI vs VOI
 - Immediately see \$3 spend leads to \$1 reduction in cost
 - Later for every \$1 spend see \$3 reduction in cost
- Positive effect of wellness programs on employee engagement
- Positive effect of wellness programs on employee retention
- Some of the recommendations from the Healthy Campus Network overlap with CUCSA committee recommendations
- Making a collective impact
 - Common agenda and shared measurement system
 - Mutually reinforcing activities and continuous communications
 - Backbone support organizations
 - All these lead to wellness as a collective success

Performance Management (NOTE: not all campuses have submitted their information)

- Charge was to look at how UC as a whole can improve on a low scoring area of the 2015 staff engagement survey that fell under the performance management category: “I feel my personal contributions are recognized”
- Key areas investigated
 - Annual performance review process
 - Training for staff around performance management
 - Pay for performance
 - Staff recognition
 - Service awards
- Key Highlights from Campuses on Annual Performance Review Process
 - UCB – performance review focus evolving from core competencies (systemwide practice) to goal oriented
 - LBNL – Performance review: annual 100% completion rate (tied to lab funding from DOE), if manager/supervisor is not in compliance they (and their manager) do not receive merit increase.
 - UCI – adjustments made to 2015 performance reviews to reflect variances in roles revised clarifying employee accountability for their performance
 - UCIMC – adjustments made to performance reviews – specifically added section on peer evaluations as a way for staff to change things that are not working. Also, less focus on rating scores and more on performance dialogue.
- Key Highlights from Campuses on Training for Staff

- UCI – Launched robust performance review departmental trainings and web site info; promote performance management LMS training and courses
- LBNL – offer performance review samples for employees and supervisors to review and videos that demonstrate difference between good performer and a poor one.
- UCOP – non- mandatory supervisory training program
- UCSD – big push to urge staff to participate in performance management certificate e-learning; training on disability accommodations
- Key Highlights from Campuses on Pay for Performance
 - This is an area where most campuses are not seeing a lot of movement.
- Key Highlights from Campuses on Staff Recognition
 - UCB
 - Staff Appreciation Week
 - Performance Bonus Programs (star program and achievement awards)
 - LBNL
 - Spot awards
 - UCSD
 - Employee of the year award
- Key Highlights from Campuses on Service Awards
 - UCB
 - New service award program
 - UCI
 - Recognizes service starting with 5th year
- Obstacles and Areas of Improvement
 - Common threads
 - Adjusting for inflation of performance evaluations where most should be at meets expectations but are rated higher
 - Helping managers and supervisors to be more clear about what success on the job means, and on employee expectations – up front.
 - At UC medical centers and departments with large staff volume
 - Working environments: manager to staff ratio's are high
 - Healthcare environment: challenging for staff to get away to attend training when your job tied to patient care and/or service environment 24/7
 - Making supervisory training mandatory

Change Management

- lowest approval rating in the 2015 staff engagement survey

- Do not feel planned well
- Do not feel communicated well
- Do not feel executed well
- Charge
 - Assess existing resources
 - Compile library of resources
 - Make recommendations
- Assessment phase 1
 - Conducted campus assessments
 - Met with UCOP leaders in this area
- Assessment phase 2
 - Take the learning modules
 - Polled people that work in this area or work in areas where there is very significant change being implemented (SME)
- Why not done?
 - No budget to bring in extra help to manage change and then it is shifted to people already involved in the project
 - Lack of general understanding about what change management is and the impact it has.
 - Lack of experience in managing a project.
- Is CM handled well?
 - Assumption is that there is little to no impact in most projects
 - CM is handled better at UC than private sector because we are more inclusive
 - It depends.
- Why is CM viewed so unfavorably?
 - No consistency in how it is managed and communicated
- What else they will recommend:
 - Resources for line staff that do not currently exist to get them out there and available and then include them in a library

Staff Veterans

- To date
 - Gathered data on what staff veterans want and need
 - Looked for best practices
 - Looked for research on the topic
 - Analyzing the data
 - Top areas
 - Training on veteran needs is difficult
 - Self identifying is difficult
 - Placement needs to better
 - Place veterans according to their skill set
 - Don't know how to internally translate the skills and experience
 - Recruitment and retention is problematic

- Determine best practices
 - Pair problem with solution

Thursday, 3/3/2016

CUCSA Business

- Discussion on volunteer centers on various campuses and programs that encourage volunteerism on the campuses.
- Systemwide Staff Veterans Work Group Update
 - Identifying the issues that UC wants to address
 - Divided the group into smaller workgroups to research each of the issues identified.
 - Don't want to force each campus to do the same thing but would like to share best practices that the local campus can use should their population need that
 - Looking to have recommendations to the President by the end of the year
 - There is academic involvement in the group.
 - Really wanted to impress upon the group that the needs of student veterans is completely different for the needs of staff/faculty veterans.
- Service Recognition
 - UCSC, UCB do not give pins.
 - Thought that maybe we start at 1 year with a t-shirt and they get progressively more valuable.
 - UCSD is doing an idea wave to try to get ideas to see what staff want to see.
 - Not all campuses do monetary gifts in addition to the token gift for service recognition.

Marc Fisher

- REF: campus profile handout provided; Power Point presentation shared
- Campus Profile Highlights
 - Campus continues to move up in the rankings
 - Campus is in the middle of a marketing campaign called "the story"
 - Admissions and New Enrollment
 - Hispanic serving institution
 - 23k students this year and continue to increase
 - LRDP has a 25k model
 - Fall Enrollment by Class Level

- Approx 10% out of state and hope to increase to 12% for diversity and funding issues
 - 42% first generation students
 - GPA continues to increase
 - Where Students Live
 - Most students live on campus and would like to see that number up to 50% by 2025
 - Students also live in Goleta and Isla Vista
 - They have two bus services to help get students, staff and faculty around for shopping, entertainment, etc.
 - There is a shift in what students are studying; undergraduate population decreasing; not many masters degrees; heavy doctorate degrees – Princeton is similar in structure
 - Expensive campus especially for undergraduates
 - UCSB Personnel
 - Heavily dependent on student labor
- Administrative Services Division
 - Audit (Direct Report)
 - Human Resources (Direct Report)
 - Police (Direct Report)
 - Housing, Dining and Auxiliary Enterprises (AVC)
 - Design, Facilities and Safety Services (AVC)
- Staff Engagement
 - More than 400 people attended the event
 - Areas of improvement
 - Communication
 - Partially a problem because of the decentralization of their IT
 - Performance Management
 - Change in rankings will require a culture shift for the organization
 - Used a phone survey system
 - Moving to two town halls a year
- Campus Projects
 - Library
 - Faculty Club
 - Staff/Faculty Apartments
 - Undergraduate Student Housing
 - Faculty Housing
 - Restoration of their north campus open space to create a series of wetlands (former golf course)
 - Visiting Scholar Apartments (built at a rate of \$1million per bed!)
 - Faculty and Staff Housing on Ocean Road
 - Would bring adults to the Isla Vista area.
 - Bioengineering Building

- Q&A with speaker

Norah Dunbar

- REF: Power Point presentation on Serious Video Games in Cognitive Bias Training
- Why Video games?
 - o They encourage the following;
 - Persistence
 - Problem solving
 - Critical thinking
 - Intrinsic motivation
 - Attentional skills
 - Cooperation
 - Hand-eye coordination
- Video games in society
 - o Fastest growing form of entertainment
 - o Made twice as much money in 2013 than did the film industry
 - o Should be considered a mainstream media
 - o Played by
 - 97% of adolescents and 53% of adults
 - 69% of all heads of households
 - o Some surprising demographics
 - One in 4 gamers is over 50
 - 81 percent of young adults play
 - 45 percent are female
- Capitalizing on video games' best features for learning
 - o Allow for repetition of lessons
 - o Learners will play games voluntarily
 - o Consider this:
 - World of warcraft players have spent a combined 5.93 billion years solving the problems of their world.
 - By the time an average young person today turns 21, they will have spent 10k hours playing video games. That's more hours than they have spent in school and the amount of hours Malcolm Gladwell says it takes to be a virtuoso.
 - o Imagine if we could put that energy toward something that would benefit them in their real lives.
- A real world problem
 - o Cognitive biases (mental shortcuts)
 - Natural tendency to use mental shortcuts called heuristics
 - Cause us to avoid systematic thinking
 - Enabled my memory, preferences, statistical flaws.
 - o Identified as one of the major threats to the work of intelligence analysts.

- Sirius program designed to develop video game to mitigate cognitive bias.
- Created a training video for us to beat.
- 3 Cognitive Biases
 - Confirmation bias
 - Tendency to search for and interpret information so as to confirm one's preconceived assumptions, expectations or hypothesis
 - Game mitigation strategies
 - Suggest keeping an open mind
 - Seek disconfirming information
 - Use deferred judgement
 - Fundamental attribution error
 - Tendency to over-emphasize personality-based explanations for behaviors in others, while under emphasizing the role of situational influences
 - Game mitigation
 - Differences between dispositional and situational cues salient
 - (missed two)
 - Bias Blindspot
 - Designed the game MACBETH
 - Intel collection
 - Players collect two pieces of intelligence per round from up to six different places
 - Archive
 - Determine threats in old case files. Threat determinations are informed by collecting clues based on either dispositional or situational information.
 - Case Files
 - Browse information related to suspects, weapons, and potential attack locations.
 - Intel Review
 - Make a hypothesis, or assist other players in making hypotheses.
 - Justify using the intel collected
 - Notebook
 - Tracking and organizing information gathered for evaluating locations, suspects and weapons.
 - Went through over 110 prototypes
 - Priming vs Non-Priming
 - Give info up front or let them learn as they go for more intrinsic learning
 - Just in time feedback vs delayed feedback

- Pop ups to give feedback (which may interrupt game flow) or give it at the end all at once like an operation analysis
 - Multi player vs single player
 - Multi player would play against real people and would that help increase bias reduction
 - Play against the computer and could not increase bias reduction because no one is watching
 - They tested all these options in 4 experiments
 - Found that priming, JIT feedback and single player worked the best
- What did they learn?
 - Capitalize on games' biggest assets
 - Repeat play, self direction, immediate feedback on mistakes
 - And they can be much more effective than traditional teaching methods
 - Even something as resistant to training as bias can be affected by effective game based training
 - Rigorous scientific testing is necessary to control for other factors. Gamers differ from non-gamers in important ways and so random assignment is essential.
- New Project: The problem with deception
 - Deception detection is very difficult – about chance accuracy (54% average)
 - Biases can interfere with accuracy
 - Training only improves accuracy by 5%
 - People have misplaced confidence, don't think they need training.
 - People lack motivation to be trained effectively.
 - Telling people they are poor at something causes reactance.
 - A new training game: VERITAS
 - Two scenarios: job interview and a workplace theft
 - Players ask questions, video of the answers
 - Try to detect deception, get feedback on errors
- Q&A with speaker

Rachael Nava

- REF: Power Point presentation
- COO Division Update
 - Program Management Office
 - Human Resources
 - UCOP Operations
 - Energy and Sustainability
 - IT Services

- UC Path Center
- Work in progress
 - COO and CFO strategic planning process
 - Continued focus on aggressive savings and increased and diverse sources of revenues
 - Active engagement in major projects and initiatives, including:
 - Presidential initiative portfolio
 - Cyber security
 - Retirement options
 - UC Path
 - Benefits portfolio
 - Working groups and task forces
 - Abusive conduct working group forming now
- Retirement Options
 - Reviewed the process to date.
 - Regent's item will be made public on 3/14 which will have details on the President's recommendations on this topic.
 - (discussion on this topic)
- Presidential Initiatives
 - Teach for California, research for the world
 - Academic Pipeline
 - UC-HBCU Initiative
 - President's Postdoctoral Fellowship Program
 - Transfer Students Action Team
 - UC-Oakland Partnership
 - Undocumented Students Initiative
 - Student Housing Initiative
 - Global Impact
 - Global Food Initiative
 - Identify best practices and share widely within UC, California, the nation and the world
 - Use the power of UC research and extension to help individuals and communities access safe, affordable and nutritious food while sustaining our natural resources
 - Deploy UC's research to shape, impact and drive policy discussions around food issues at the local, state, national and international levels.
 - Innovation and Entrepreneurship Initiative
 - Goal 1: structure the UC to actively support innovation and entrepreneurship
 - Established office of research innovation and entrepreneurship at UCOP with SVP reporting directly to the president

- Streamlining process hurdles (ex. UC Quick Start program for startups)
 - Goal 2: stimulate and environment of research innovation and creativity
 - Building and expanding award and grant programs to promote and support research and entrepreneurship efforts by faculty and students.
 - Prime UC
 - Presidential Research Catalyst Awards
 - GradSlam
 - Outstanding Faculty Leadership in Presidential Initiatives
 - Goal 3: invest in UC entrepreneurs and technologies
 - Established UC Ventures, comprised of 3 investment vehicles from OCIO
 - Co-invest alongside local fund; return portion of realized gains to campus
 - Anchor investor in a UC Venture Capital Fund
 - Partner and Co-invest with Existing VC portfolio within OCIO
 - UC-Mexico Initiative
 - Research Catalyst Awards
 - Carbon Neutrality Initiative
- Q&A with speaker

Mark Cianca

- REF: Power Point presentation on UC Path Update
- Agenda
 - UCPath program overview
 - UCOP deployment
 - UCPath Center status
 - Pilot deployment progress
 - Remaining deployments
- UCPath is critical to future of UC and is part of an effort to create business efficiencies that ensure the University maximizes the resources available to teaching, research, and public service.
- Benefits to the UC

- Provides a platform for transforming the way UC provides administrative services
 - Through UC Path, the University of California will gain:
 - A foundation for future business efficiency
 - A shared services center that handles transactional processing and provides consistent service to all UC locations.
 - An opportunity for campuses to re-envision and optimize the delivery of local services, starting with HR, academic personnel, and payroll
 - The ability to better meet our complex operational and workforce needs
- Deployment
 - Successful UCOP Go-Live on Dec 1
 - Initial pay cycles with less than 1% rework rate vs 3% with historical PPS system
 - Users are successfully accessing the UCPath portal with minimal issues
- UCOP Deployment 0 the Core of UC Path
 - A significant portion of UCPath work is complete with the UCOP deployment, including:
 - 100% of system benefits configured
 - 100% of systemwide vendor interfaces complete
 - 70% of customizations designed, built, tested and deployed. Remaining build includes academic pay, talent acquisition and performance management
 - 60% of corporate systems integration complete
 - 50% of labor contracts configured in UCPath
 - UCPath Portal, including 100% of self service capabilities for employees
 - Solutions in place for verification of employment, unemployment claims, etc.
- UCOP Post Production
 - W-2s delivered
 - Transition support finalized Feb 29
 - Knowledge transfer to UCOP continues
 - Very positive feedback from employee interactions with UCPath center
- (note: provided three slides of trends at the UCPath center)
 - Note: number of cases in benefits in November high (approx 1100) because of open enrollment.
 - After the first payroll, they had less than 200 cases per area except benefits which had a little less than 300 cases.
 - Benefits
 - Payroll – payroll a few pennies off which created cases

- Vacation/sick/PTO – no longer on stub; available online
 - Employment
 - Job/Position Information
 - Portal
 - In January saw a decrease in cases in all areas
- Remaining Work
 - Pilot (deployment of the first three academic campuses)
 - Academic pay
 - Health sciences and student employment
 - Additional academic and health sciences functionality
 - Later Deployments (tools are available systemwide but will they be required?)
 - Online recruiting
 - Electronic performance management
 - Deployment Sequence
 - UCOP
 - UCOP
 - Pilot
 - UCLA
 - Riverside
 - Merced
 - ASUCLA
 - Deployment 1
 - Davis
 - Irvine
 - Santa Barbara
 - Santa Cruz
 - ANR
 - Deployment 2
 - San Diego
 - UCSF
 - Berkeley
 - Hastings
- Pilot Deployment
 - Functional design continues with 38 of 53 designs completed to date
 - Timeline due by April 6
 - APS design completion extends to the end of March
 - Other work in progress
 - Development of end to end Pilot Deployment project plan
 - Close out of outstanding business process design issues
 - Location review of conversion design and mapping deliverables
- Remaining Deployments
 - Post Pilot Planning

- Talent acquisition and ePerformance management functional requirements/process design work is underway
 - Local future state process design reviews are occurring through Q2 of 2016
 - Road map design to address increased functionality of future deployments currently in progress with governance
- (showed the group the online portal to access UCPATH – ucpath.ucop.edu)
 - Everything for you and your benefits (left column)
 - Manager can now access payroll information for everyone that is under your supervisory line. You had to ask someone that had access to PPS to do this before.
 - Forms you may need (center column)
 - Resources (right column)
 - Payroll deadline calendar
- Q&A with speaker

Dwaine Duckett

- Educational Benefits
 - Presented at the Council of Chancellors on the topic of educational benefits programs on the different campuses and how they are being used and received by staff.
 - Agree that we need to do more to help market them so that people know what is available and how they can access them.
 - Also need to do more to promote development programs and to provide the opportunity for staff to actually take advantage of these programs (ex. Release time)
- What do we do that may be changed or eliminated?
 - Ex. Designations without a lot of meaning (ex. PSS, MSP)
 - There is a workgroup in HR that will work toward eliminating these kinds of distinctions/false barriers. Looking for recommendations by the end of summer 2016.
 - This may help to show that there is a career path and that you don't need to break out of one group (ex. PSS) to get into another (ex. MSP)
- People Management Series
 - Set up a certification for people managers within UC.
 - Suggestion that curriculum set-up that can be used on job descriptions that this certification is preferred.
- Anti Bullying Task Force
 - Two unions to participate so that they are invested in the result.
- Q&A with the speaker

Outstanding Senior Leader Award and Outstanding Staff Award Nominations: Presentations and Voting

- Outstanding Senior Leader Nominees
 - o Gary Matthews (UCSD)
 - o Ashish Sahni (UCSC) – Selected by CUCSA Delegation
- Outstanding Staff Nominees
 - o Lady Idos (LBNL) – CUCSA Delegation votes to award.
 - o Rosemary Chavaya (UCLA) – CUCSA Delegation votes to award.
 - o Ricki Carr (UCSC) – CUCSA Delegation votes to award.
 - o Leeann Dolbeck (UCSD) – CUCSA Delegation votes to award.

Friday, March 4, 16

CUCSA Business

- UCR Campus Update
 - o Society 54 – payroll deduction from staff to go to their assembly to use for staff needs; tax deductible
 - They did some special promotions to try to get people to donate. One example was a special invite for a special cookie with the logo.
 - Created new levels within the program to encourage people to give more.
 - Approximately \$700 monthly in donations.
 - They have a brochure that they can share.
- UCSF Campus Update
 - o Their assembly is getting more organized and more staff are getting involved. As a result, senior leaders are excited about what is being done.
 - Senior leaders want to learn more; offering money for projects.
 - Seems to be an investment
 - o Examples of things moving forward:
 - Staff internship program
 - Staff scholarship program
 - Asking for 4-5 scholarships a quarter @ \$500 each.
- UCDHS Campus Update
 - o Planning employee excellence awards as well as their TGFS event.
 - Monetary awards for the excellence awards.
 - o Will hold their first breakfast with the chancellor on their campus.
 - o Started breakfast with their Dean and VC.
 - Will do 6 annually.
- UCD Campus Update

- Reimagine Our Work Day
 - Started as an idea from staff
 - SA worked to put the program together and implement it.
- UCSC Campus Update
 - Staff recognition program which is only an SA thing and there is no monetary reward. Only recognition and peer nominated.
 - Lunch with the chancellor at the end of the fiscal year.
- UCLA Campus Update
 - Created a board position for development.
 - They have fundraising events.
 - Small resource fair that they do in conjunction with Purchasing
 - Interested in doing a “staff tradeshow” which showcases staff that do things outside of their regular work place.
 - 5K race which they could grow to include vendors
- UCI Campus Update
 - 75 staff showed up to meet their provost; opportunity for them to have one on one with the provost.
 - Gave a short presentation of their strategic plan
- LBNL Campus Update
 - Working to start an assembly on their campus.
 - Just launched another engagement survey that was lab specific.
- UCSD Campus Update
 - CHRO met with them to learn more about what they do and staff issues
- UCB Campus Update
 - Chancellor’s chat was changed to include other high level administrators and change the date.
 - Goal for the event is to solicit staff feedback about the strategic planning process
- UCOP Campus Update
 - Mardi Gras celebration in February – after work get together.
 - Gearing up for annual take your sons and daughters to work day.
- UCSB Campus Update
 - Annual staff celebration week is coming up.
 - Ice cream social where administrators serve
 - Cookie contest
 - Tours
 - Luncheon with citations of excellence awards
- UCM Campus Update
 - This year will separate out the citations of excellence awards from the picnic and have a special event for those that won an award.

Chancellor Henry Yang

- Thoughts on the 2016 Retirement Options

- Their EVC is on a committee to help voice concerns from their university
- Voiced a concern about potential difficulties in recruitment.
- Thoughts on giving staff time to volunteer
 - He thinks it is a good idea to help and would thank staff for any help they could give to campus efforts (specifically speaking about Isla Vista)
- Thoughts on partnering with Staff Assembly to achieve University goals
 - He wants to thank SA for what they are already doing to achieve campus goals.
- Question about whether or not they have backlash from the local community on building new projects.
 - Since they are not building in the city, he doesn't have issues with them.
 - They are trying to build on potentially environmentally sensitive areas so they instead have to work with the Coastal Commission to build projects.
- Thoughts on restoring state funding
 - Important to also raise other sources of income

Nathan Brostrom

- REF: Power Point presentation on Charting a Sustainable Financial Model
- UC is committed to its three pillars of excellence
 - Quality – top quality institution
 - Access– committed to enrolling a diverse student body and supporting access for students from low-income families
 - Affordability– support access by providing a generous, progressive financial aid program
- New York Times article “Colleges Doing the Most for Low-Income Students” 9/17/15
 - UC had 6 in the top 10
 - We provide access to over 80,000 students
 - The concern is that our endowment per students is very low compared to the other 4 schools in the top 10
- Strategy is to develop a long term budget model based on four priority areas: leveraging the balance sheet
 - Predictable state funding
 - Moderate tuition plan
 - Alternative revenues
 - Administrative efficiencies
- Over the past 25 years, UC's share of the state budget has declined dramatically
 - State budget has grown but funding to UC has stayed flat while enrollment grew by 83,000 students

- Why?
 - Volatile budget model
 - Voter mandates on how to spend the money
 - Health and human services
 - Corrections
 - K-12 education
 - Other higher education
- The volatility of our tuition policy mirrors the volatility in state funding
 - Unfair to students and unfair to campus who cannot plan adequately.
- UC spending on education per student has declined over time. State funding has plunged even more steeply.
 - State funding decreases
 - UC general funds stay roughly the same
 - Fees and tuition paid by students increases
- Recent state budget negotiations
 - 4 percent base budget increase for the next four years 500m total
 - 436m over three years in one time funding for retirement.
 - No instate tuition adjustments for the next two years, then generally pegged to inflation
 - Tuition increases for nonresident undergraduates and most professional degree programs
 - One time funds for deferred maintenance and cap and trade
 - contingent enrollment funding.
- Alternative revenues – UC’s financial strengths supported by its diverse revenue streams
 - UC Medical Centers
 - Grants and Contracts
 - State appropriations
- Undergraduate nonresident enrollment has grown as state funding was cut
 - Almost tripled during the recession
 - 4.7% to approx 15% (average; some campuses are at 20+%)
 - they do not displace resident students because that number has been maintained; the non resident has increased
- UC still enrolls a far smaller percentage of nonresident students than its peers
 - Examples
 - Michigan
 - Virginia
 - Illinois
 - SUNY Buffalo
 - AAU Public Average
- UC campuses are developing other areas of enrollment management
 - Alternative approaches to supporting the academic mission and addressing funding concerns include:
 - Profile of graduate education

- Masters vs PhD students
 - Certificate programs
 - Expansion of extension programs
 - Self-supporting programs
- UC medical centers annual revenues increased almost 1.7x over the past 6 years
- UC has sustained the scale of its research enterprise, increasing research expenditures 10% over last year
 - UC's research expenditure exceeds \$5 billion including indirect cost recovery and benefits
 - Total awards remained almost constant year over year, having recovered from sequestration drops.
 - Federal awards have remained almost constant year over year, and are at about the same level they were a decade ago, taking inflation into account.
- Private support has grown steadily over time
 - While this is a positive, it is largely restricted and doesn't really help with the financial model.
- Our philanthropy strategy counts on incentivizing overall giving and incorporating new models which promote fungibility
 - Effective models exist which maximize and honor donor interests while meeting the core needs of campuses
 - Endowed Chairs
 - Hewlett matching grants (Berkeley Campus)
 - Presidential match for endowed chairs
 - Student financial support
 - Capital financing
- The university has \$16.7 billion debt outstanding
- Our financial assets have grown steadily and are focused on optimizing campus returns
 - Looking to see how we can lower STIP but still meet the U's liquidity needs
 - Instead use TRIP which has higher rate of return
- We have developed strategies to optimize returns and manage liquidity at every campus
- As a result of strong investment performance and actions UC has taken, UCRP is currently 80% funded.
- The university will utilize one-time funding from the state to continue to strengthen our retirement plan
- UC's CIO has the size, scale and patience to invest directly to support UC operations
 - Innovation and sustainability
 - UC Ventures
 - Supports commercialization
 - Biological Dynamics: molecular diagnostics UCSD innovation

- Fostering competition and new ideas
 - Sustainability and carbon neutrality
 - Real Estate
 - Student housing (UCSB)
 - CIO Office (1111 Broadway)
 - Hotel (UC Davis)
 - Development
- The UC procurement initiative seeks to redirect \$200 m to teaching, research and public service
- In energy efficiency, UC has already achieved significant cost avoidance through partnerships with the IOU's
- Fiat Lux leverages greater insurance and risk financing opportunities than traditional insurance arrangements
 - Fiat Lux, UC's captive insurance company
 - Reduces insurance/reinsurance spend
 - Generates millions in savings and cost avoidance annually by assuming risk on existing insurance programs
 - Allows more resources and money to be reinvested into UC campuses
 - Provides insurance coverage to UC when it is not commercially available or too expensive to purchase
 - Creates new revenue streams to UC via UC Health and other institutions
- UC-wide administrative enterprise systems offer opportunities for more effective services and lower costs over time. UC Path provides a platform for transforming the way UC provides administrative services and will help UC gain:
 - Shared services center providing consistent service and transaction handling to all UC locations.
 - Better compliance and reduced risk via standard definitions and processes for our complex operational and workforce needs
 - Campus efficiencies in the delivery of local human resources, academic personnel, and payroll services.
 - A foundation for additional business efficiency.
- Challenges to the UC Financial Model
 - The University still faces significant capital needs and a constrained fiscal environment, creating a debt capacity gap.
 - UC has an unfunded liability for retiree health of \$17 billion as of July 2015

David Marshall

- Spoke about bureaucracy and how it exists within the academic enterprise. Also talked about working through the bureaucracy is necessary to re-invigorate academic planning – planning can take place within a bureaucracy.

- Creation of UC was a combination of agricultural institution (Agricultural, Mining and Mechanical Arts College) and a liberal arts and classical institution (College of California)
- What will the UC look like 10-25 years from now? Do we have a sustainable academic model?
 - o Our established assumptions are being challenged.
 - Do we need a physical place?
 - Tenure
 - Four years or less?
- We are good at looking at data from the past and projecting the future. Is this really planning?
- How do we engage in a new strategic planning model?
- Planning is about trying to re-imagine the future and figuring out what you need to get there.
- Q&A with the speaker

Steve Juarez

- What is the systemwide state and government relations office and what do they do?
 - o Face of UC in Sacramento; primarily responsible for being the voice of UC at the capitol.
 - o Serves as primary outreach to the legislature, regulatory agencies, and other state agencies on matters of policy and questions from constituents.
 - o Lobbying and testifying on bills in the legislature.
 - o Managing and coordinating the UC advocacy program
 - o Maintain and build relations with state policy makers – make sure these individuals see them as a resource.
- What do the local campus groups do?
 - o They do what the systemwide office does but specifically for the campus they represent and also for the UC.
- Importance of Advocacy
 - o As an institution, we cannot make contributions so can't influence decisions based on giving
 - o Use advocacy to reach out to policy and decision makers
- Planning a UC Innovation Day at the capitol to advocate on behalf of two pieces of legislation that would benefit UC
- Priorities for 2016-2017
 - o \$6m for 600 graduate students to support new faculty and serve as teaching assistants to support increased undergraduate enrollment
 - o Enhance the multi-campus Institute for Transportation Studies to advance research in 5 areas that the State has identified as critical, including climate change and infrastructure (\$9m over 3 years)
 - o A second installment of one-time cap and trade funds that will be dedicated for "shovel ready" projects that aggressively reduce

greenhouse gases and help UC achieve carbon neutrality by 2025
(\$69m)

- Q&A with the speaker

Nathan Brostrom was appointed Executive Vice President – Chief Financial Officer for the University of California in September 2014. As CFO, he oversees all aspects of financial management for the University of California system.

His areas of responsibility include asset management, debt management, the systemwide operating budget, capital finance and planning, procurement and financial accounting.

Prior to his CFO appointment and since September 2009, Nathan served as Executive Vice President – Business Operations for the UC System. He also served as Vice Chancellor for Administration at Berkeley when he started at UC in 2006.

Nathan has his undergraduate degree from Stanford University and his master's degree in public and international affairs from the Woodrow Wilson School at Princeton University.

Please join me in welcoming Nathan Brostrom.