



2013-14
Internal Operations
Workgroup Report

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I. Executive Summary

The Internal Operations Workgroup (IO) focused on continuing to develop communication among delegates and between delegates and CUCSA leadership. In addition, the group updated key CUCSA documentation and accessed information from other assemblies outside of UC that could be useful for the delegation in the future. The group continued two surveys established by previous IO Workgroups: one was to reveal best practices at local staff assemblies, and the other to provide delegates an opportunity to share critical and anonymous feedback about the CUCSA quarterly meetings. The delegate survey provided information to CUCSA leadership that can be acted upon at the following quarterly meeting. The campus survey provided diverse information from which all of the locations can learn and that they may implement locally.

As a new initiative, the workgroup reached out of the UC system to identify other university staff assemblies to share best practices. Staff assemblies were identified at Colorado University, University of Utah and Butler University. Varying levels of information were gathered. Information appropriate for the Local Operations Workgroup was shared, and opportunity for future workgroups to further the inroads made by this committee in information gathering was identified.

This was the first year that CUCSA had an Electronic Data Officer (EDO). This position was a recommendation from last year's Internal Operations Workgroup, and the EDO was a member of the workgroup this year. The EDO was tasked with analyzing the various electronic systems CUCSA uses on a regular basis and develop a manual for future EDO's. The CUCSA website, Facebook page, internal Facebook group, and CUCSA SharePoint installation were among the systems analyzed during the year.

The CUCSA Strategic Plan was a major focus for the Internal Operations Group this year. The plan had been updated twice in the past, and the latest update was in 2010. The group worked with the delegates to create a new strategic plan during and between CUCSA meetings. Not only was it successful to have dedicated time on the agenda to receive feedback in real time from all of the delegates, it synthesized the strategic plan as a document that captures what matters most to the delegation with feedback from all members.

II. Introduction

For the 2013-14 CUCSA year, the Internal Operations Workgroup (IO) focused on clarifying CUCSA's strategy, sharing best practices, building relationships outside of UC, sharing quarterly meeting information and electronic data capture of CUCSA business. The group continued the CUCSA Meeting Feedback Surveys established last year, updated the Best Practices Campus Survey and the CUCSA Strategic Plan. The group also established relationships with other non-UC educational institutions to benchmark best

practices related to their staff assemblies, and focused on ideas to improve key communication tools like the CUCSA webpage for the delegation. Through research, the group came up with several recommendations for future delegations to consider each year.

III. Research and Findings

1. CUCSA Meeting Feedback Surveys

The CUCSA Post-Meeting Feedback Survey was implemented in 2012-13 by the Internal Operations Workgroup, in consultation with CUCSA Leadership. CUCSA leadership for 2013-14 supported the ongoing use of the survey, which provides delegates with the opportunity to provide anonymous feedback regarding each quarterly meeting. Delegates are encouraged to provide their honest comments and suggestions in a constructive and positive manner. The information obtained from each survey helps to provide CUCSA leadership with ideas to help enhance and improve subsequent meetings.

Surveys were conducted after each quarterly meeting. The September survey yielded 22 responses, with December at 23, March at 22. Overall, the majority of delegates rated all three meetings as either excellent or very good. Most felt that CUCSA communications provided them with sufficient information for meeting preparation, but would appreciate having logistical information further in advance to allow more time to make travel arrangements. The September survey indicated a strong need for senior delegates to share with junior delegates prior year topics/issues that are likely to be revisited in the current year. Delegates appreciated the new format of campus updates, and felt the open dialogue enhanced the feel of CUCSA business. All surveys showed mixed results regarding speakers. Specifically, while delegates enjoyed many of the speakers, they did not see the relevance to them in their role as a campus representative. Suggestions were made to eliminate a speaker to allow more time for CUCSA business, workgroup time, and other opportunities for delegate interaction.

2. CUCSA Best Practices Campus Survey

The CUCSA best practices campus survey was developed by a CUCSA workgroup in 2008 as a tool for delegates to be able to document and share the structure and practices of their home institution staff assemblies with each other. The survey was previously conducted twice in 2008 and 2010, and needed to be updated to reflect current best practices.

One concern in performing the survey this year, was avoiding survey fatigue by the delegation. It was critical to get as many responses to the post-meeting surveys as

possible without confusing the group with the best practices campus survey. In October 2013 the IO workgroup engaged the Local Operations workgroup for feedback about information they wanted to include in the campus survey. Once the topics were established in November 2013, IO sent the proposed criteria to CUCSA Leadership for feedback and approval.

The topics for the campus survey was as follows:

Annual budget, primary funding source, membership (inclusive or exclusive), how members join, dues, delegate selection, regular meetings with campus leadership, annual programming and staff support activities, additional funding sources, junior delegate education, mission statement, committees that assembly members sit on, types of outreach assemblies perform, common ways of communicating with staff at large.

The survey was handed out to the CUCSA delegates at the beginning of the December 2013 meeting with feedback requested by the end of the meeting. It took a couple of months for the IO workgroup to gather the information from all campuses, and the survey was complete by February 2014. The CUCSA best practices survey results were sent to CUCSA Leadership by the IO workgroup in April 2014 (see Appendix L).

3. Access Other University Staff Assemblies

CUCSA allows UC entities access to a collective pool of knowledge from across the UC system. While the campuses all share a common mission, each entity within the system contributes unique ideas and a distinct culture to the whole. The external campus review was undertaken by the IO workgroup to further expand the diversity of our collective knowledge base by developing collaborative partnerships with external organizations. Specifically, the group looked to foster idea exchange to identify new ways to better serve the staff that the delegates represent and construct new benchmarks, as a result of this effort, to enhance our operations.

As a first step, the IO workgroup formulated a call sheet of prospective staff assembly organizations from other prominent colleges and university systems. Dialogue was solicited from organizations that exhibited parity with CUCSA (see Appendix A). An initial communication was sent to 10 entities in an attempt to measure interest of engaging in a discussion about University Staff Assembly/Association best practices (see Appendix B).

Subsequent to the introductory communication the IO workgroup made efforts to schedule preliminary meetings with Staff Assembly Representatives

at four higher educational institutions: Paul Larson, University Staff Council, the University of Utah; Deserae Frisk, Staff Council Chair, University of Colorado; Josh Downing, Staff Assembly Chair, Butler University; and Jeff Geldien, Staff Assembly President, Gonzaga University. Of the four leads, the University of Colorado System and Butler University were the two organizations that committed to a preliminary meeting with the IO workgroup. The initial meeting was a high level discussion of our respective staff organizations and their role within the higher education institution they originate from (see Appendices C and D). Following the conclusion of the preliminary meeting, a communication was sent to both Deserae Frisk and Josh Downing requesting an exchange of strategic documentation (see Appendix E).

After the strategic documentation exchange (see Appendices F, G, and H), the IO workgroup proposed a deep-dive session with both Butler University and Colorado University System representatives to discuss current events taking place within each council. A 1-page document was provided prior to this discussion, containing CUCSA events and relevant issues (see Appendix I). In January, CUCSA executive board and work group leadership conferred a clearer outline of project scopes. The Local Operations workgroup was charged with examining how to overcome common campus staff assembly challenges. To do so, they would work with UC staff assemblies and external university staff assemblies. The Internal Operations workgroup would focus on best practice exchange with other university system-wide assemblies. As a result of the workgroup realignment efforts, Butler University was transitioned over to the local operations work group examine best practices at the campus level.

During the IO's deep dive discussion with the University of Colorado System Staff Council Chair best practices as well as the following topics were discussed: Issue elevation protocol from campus to system, the University of Colorado System Staff Council Partnerships, The council's role as a governance group, meeting procedures and system-wide employee composition (see Appendix J). These discussions led to the formation of three formal recommendations proposed by the IO workgroup.

4. CUCSA Webpage and Electronic Communications

In response to the recommendations set out in the 2012-13 Internal Operations report, the position of Electronic Data Officer (EDO) was adopted at the December 2013 meeting. A mandate of this position was to establish and maintain an EDO manual to help describe the primary responsibilities of the position and set out procedures for carrying out these duties. The EDO manual was created and saved in the CUCSA SharePoint location. As a part of defining and implementing the desires

of CUCSA leadership, as it related to electronic data, the EDO was tasked with focusing on the CUCSA website and the CUCSA SharePoint implementation.

5. CUCSA Strategic Plan

The CUCSA strategic plan was first created in March 2008 and updated in October 2008. No other action has been taken to review or update it. The plan consists of concrete information such as the CUCSA mission statement, but also has fluid information such as delegate names, workgroup titles, etc. The Plan is obsolete, has been updated by the IO group, and will be submitted to CUCSA leadership.

Upon reviewing the dated information contained in the strategic plan, the group identified an opportunity to engage the CUCSA delegates in a facilitated strategic planning discussion process. The goal of that discussion was to help clarify how CUCSA could optimally serve the UC system and its key constituents. In December 2013, CUCSA members were asked to imagine how CUCSA could help the UC system become identified as a *“Best University to Work.”* This was loosely defined as UC performing well financially and ranking high in all key measures, with all staff feeling heard, responded to and appreciated. That discussion resulted in the identification of 47 potential initiatives or actions items, falling into the following categories: CUCSA structure, CUCSA meetings, staff involvement and input, communication tools, branding/marketing, UC career development, staff perks, connecting staff and leadership, and partnerships.

In March 2014, participants revisited the initial list of potential initiatives and were asked to select the items they thought were most critical to CUCSA successfully advancing its mission. At the conclusion of a structured consensus building process, the delegates identified the following top five priorities, in rank order:

- CUCSA has a seat on President’s Executive Committee to provide input on all decisions that impact staff
- Create an awareness campaign so every staff member knows what CUCSA is and Marketing plan with a dedicated CUCSA member responsible (something like the EDO)
- Unrestricted access to UC education (CUCSA was instrumental in enhancing removal of education restrictions)
- Staff Advisors are engaged with CUCSA structurally
- CUCSA serves as a storehouse for best practices to support Staff Assemblies

CUCSA began preliminary discussions regarding these priorities, including: purpose, key features, key milestones and accountability. The top five priorities and results of the preliminary discussions are being used to draft recommendations for 2014-15 work group and ad hoc groups.

There was a consensus amongst CUCSA members that the organization's brand needs to be clearly defined before any concerted marketing and communication efforts take place to ensure consistent and accurate messaging.

IV. Workgroup Recommendations

1. CUCSA Meeting Feedback Surveys

CUCSA should continue the CUCSA Post-Meeting Feedback Survey in 2014-15. Currently, the delegation is using SurveyMonkey to capture this information. The account is owned by UCRiverside, Graduate School of Education (Robert.wolfer@ucr.edu). SurveyMonkey offers a free account with 10 questions per survey and 100 responses per survey. CUCSA currently has a free account at <http://www.surveymonkey.com/> using the following credentials:

- Username: CUCSAEDO

The IO workgroup recommends sharing feedback/comments with all delegates to assist them with planning when they are they host campus.

2. CUCSA Best Practices Campus Survey

There are two recommendations for the CUCSA best practices campus survey going forward. The survey can be a helpful tool for all delegates, and it is recommended that *time be allocated in one of the meetings during the year to discuss the contents and solicit feedback from delegates.* Sending the survey information in advance of the meeting with the rest of the meeting materials in which it will be discussed is suggested.

Secondly, it came to light through the survey and during CUCSA discussion at meetings, that the topic of training of junior delegates prior to the first meeting in September was a concern across the delegation. The IO workgroup recommends that *developing a formal training for junior delegates in addition to the conference call held by leadership prior to the September meeting should be a focus for one of the workgroups next year.* It is recommended that the training include information about historical projects, leadership's focus for the coming year, and relevant UCOP led topics that will likely be discussed during the current year. This will help the juniors to be better informed about CUCSA, its influence and its history prior to the first meeting.

3. Access Other University Staff Assemblies

Moving forward the IO workgroup recommends that *CUCSA should support sustained efforts to cultivate*

an external staff assembly consultation network. Partnerships with organizations like the University of Colorado System Staff Council (UCSSC) allow CUCSA an avenue to exchange views and identify new methods to address development areas. At a minimum, if CUCSA were to maintain an informal network with external staff assemblies it could formulate ad hoc work groups to deal with matters that benefit from diverse perspectives. Conversely, CUCSA can take a lead role in the formalization of professional network of staff assemblies with the goal of sharing expertise, leveraging resources, and collaborating on innovative programs that further benefit the staff populations at member schools.

The University of Colorado System Staff Council is a governance group and as such works directly with other governance groups and executive leadership on decisions that impact the entire University of Colorado System. By virtue of their status as a governance group, the UCSSC has a dual reporting relationship to both the regents and the president of the Colorado University System. Equally noteworthy is that staff has a seat at the regents meetings, held by the Chair of UCSSC. At present CUCSA does not have the same level of input at Regents meetings, and yet the CUCSA delegation is comprised of staff subject matter experts from the entire UC system. To address the lack of involvement in critical dialogue, the IO workgroup recommends that *we should amend the CUCSA organizational structure to include the Staff Advisors to the Regents.* The IO workgroup believes that modifying the CUCSA structure will improve information exchange across all levels, and initiate a significant step in inclusionary practices between non-exempt staff and the Regents.

One stand out programmatic activity hosted by the University of Colorado System Staff Council is the spring conference and award ceremony. The June delegate's reception can be modified into a small ceremony complete with a presentation of the executive leadership award. Also for consideration, the soon-to-be past chair can provide a state of the delegation address complete with anecdotes and milestones of his/her 2-year tenure as chair elect and chair. Elements like the State of the Delegation address incite a sense of significance and tradition among all participants that will enrich our organization's culture.

4. CUCSA Webpage and Electronic Communications

Based on the analysis of the electronic systems used by the CUCSA organization and the future viability of the EDO position, the following recommendations are proposed:

1. The current CUCSA website is hosted by the University of California Office of the President (UCOP). The current procedure for updating the CUCSA website is by sending a request to Information Technology Services at UCOP and waiting for

- the updates to be completed. CUCSA is charged each time the site is updated. To reduce cost, CUCSA updates are held until multiple updates can be done together. At the beginning of the year, the EDO and CUCSA leadership examined the possibility of moving to a content management system (CMS) hosted by UCOP and it was determined that the move would be cost prohibitive. It is recommended that *the CUCSA website should be moved to either a campus CMS or an external hosting company*. An example of a campus CMS hosting the site has been established at <http://cucsa.ucr.edu/>. Alternatively, the CUCSA website could be hosted by an external company such as Yahoo (~68.02 annually) or GoDaddy (~\$41.88 annually). Possible domain names for external hosts include cucsa.net and cucsa.us.
2. The current CUCSA SharePoint site is hosted by UCOP and is currently set to be managed by the EDO. Although SharePoint has many features that allow for data collaboration, it is often more complicated to use than other systems like google docs or drop box. To address this issue, the contents of the CUCSA SharePoint site have been streamlined to include a document library, a calendar and important links. To encourage both use and accessibility, it is recommended that *the EDO should provide a SharePoint walkthrough during the junior delegate orientation*. This would ensure all delegates have access to the SharePoint site and can use it to share workgroup documents, as well as, access pertinent information posted by CUCSA leadership.
 3. A topic of discussion during several of this year's quarterly CUCSA meetings was the use of social media as one method for helping to spread the word about what CUCSA is and what it does. CUCSA currently has a Facebook page located at <https://www.facebook.com/CUCSA>. It is recommended that *the EDO and CUCSA leadership should commit to posting at a MINIMUM one update or informational post per month*. It is also recommended that CUCSA leadership and the EDO look at other social media forums like twitter, LinkedIn and Instagram.
 4. The Electronic Data Officer position was adopted at the December 2013 meeting and reported to both the CUCSA secretary and the Internal Operations Chair. Both the late adoption and dual reporting lines added some initial confusion. The CUCSA leadership is the focal point of everything the CUCSA delegation does and is unified regarding their expectations for any given delegation year. It is recommended that *the EDO should report to one member of the CUCSA leadership and preferably the CUCSA Secretary or the CUCSA Chair-Elect*. The EDO is appointed by the CUCSA leadership for a one year term. To ensure a smooth and successful hand-off between EDOs, it is further recommended that the EDO for the upcoming year be appointed BEFORE the fourth quarterly meeting and that the incoming and outgoing EDOs have a scheduled opportunity to meet and discuss the hand-off.
 5. CUCSA Strategic Plan

To make sure the strategic plan remains current and the strategic priorities the delegates identified are acted upon, the group recommends the following best practices and actions be taken in 2014-15 and informed by the preliminary discussions held in 2013-14:

- Review and update the CUCSA strategic plan on annual basis, ensuring the contacts, workgroups, etc. are up-to-date. Continue to use the facilitated discussion process to periodically gain input from delegates. Conduct the full strategic planning discussion, comparable to 2013-14, on a bi-annual discussion.
- Assign Advancing the Agenda work group the responsibility of drafting a process and proposal for getting CUCSA invited to sit on the UC President's Executive Committee.
- Assign Marketing work group current marketing-related work group with the responsibility of creating a marketing plan and drafting the description of a position responsible for ultimately managing the effort.
- Establish an Ad Hoc work group to conduct research on Staff Tuition Assistance including benchmarks, options and benefits. Draft a final proposal that can be presented to CUCSA leadership, then UCOP leadership.
- Develop a full description of how Staff Advisors could partner with CUCSA. Guidelines and bylaws drafted by Internal Operations, with CUCSA leadership driving communication with the Staff Advisors.
- Establish an Ad Hoc work group to address Best Practices. The group would be responsible for identifying systems and processes for capturing and sharing information from local staff assemblies.

V. Conclusion

CUCSA is a very important aspect of the University of California system. Our mission as delegates is to advocate for staff so that their voices are heard at the highest levels of the organization. CUCSA members need to reach out to staff so they know that we are here to advocate for them. By using clear, concise, targeted communication it will allow us to engage with as many of our constituents as possible. Our recommendations for the 2013-14 year will allow the future Internal Operations Workgroups to become more effective in ensuring that the business of CUCSA continues to result in positive outcomes.

**Appendix A
Institutional Call Sheet**

Type	Institution Name	Staff Organization	Website	Contact	Comments
Inter-Institution System	The Association of Professional Staff	Committee of Institutional Cooperation	http://www.cic-apsc.wisc.edu/	Barbara McFadden Allen Executive Director bmallen@staff.cic.net 217-244-9240	-First Email Communication Sent 10/31/13 -Responded on 11/01/13 - there is no official CIC group for staff issues. The CIC is the nation's premier higher education consortium of top-tier research institutions. Through collaboration, CIC members save money, share assets, and increase teaching, learning, and research opportunities. -Follow up email to request strategic plan for inter-organizational body.
System	The University of Utah	University Staff Council	http://www.staffcouncil.utah.edu/	Paul Larsen President 2013-14 paul.larsen@hsc.utah.edu 801-587-6143	-Indicated that he will send out 3 dates for the teleconference to all the campus contacts he reached out to. He really would like to have a discussion with other staff assemblies to determine best practices. -Did not send out confirmation for meeting -11/06/13 is actively looking to secure a meeting date for the week of 11/11/13
System	The University of North Carolina	Staff Assembly	http://www.northcarolina.edu/staffassembly/index.htm	Charles "Chuck" T. Brink Chair Charles.Brink@facilities.unc.edu 919-695-2061	First Email Communication Sent 10/31/13
System	The University System of Maryland	Council of University System Staff	http://www.usmd.edu/usm/workgroups/SystemStaff/	William (Bill) Crockett Chair bcrockett@umaryland.edu 410-706-5743	First Email Communication Sent 10/31/13
System	The University System of Georgia	University System of Georgia Staff Council	http://www.usg.edu/staff_council/	Kim D. Douglas Chair Kim.Douglas@asurams.edu 229-430-1380	First Email Communication Sent 10/31/13

System	The Texas A&M University System	System Offices Staff Council	http://www.tamus.edu/home/staff/staffcouncil/	Nicole Bellows Chair NBellows@tamus.edu 979-845-0538	First Email Communication Sent 10/31/13
System	The University of Colorado	System Staff Council	https://www.cu.edu/staff/ssc	Nancy Sicalides-Tucker Chair (Past) nancy.sicalides-tucker@cu.edu 303-860-4226	-First Email Communication Sent 10/31/13 -Meeting Scheduled for 11/07/13 at 10AM PST (11AM GMT)
System	The University of Colorado	System Staff Council	https://www.cu.edu/staff/ssc	Deserae Frisk Chair Deserae.Frisk@ucdenver.edu 303-315-4989 303-697-1302 303-724-4984	-First Email Communication Sent 11/01/13 -Meeting Scheduled for 11/07/13 at 10AM PST (11AM GMT)
Campus	Gonzaga University	Staff Assembly	http://www.gonzaga.edu/faculty-and-staff/Staff-Assembly/default.asp	Jeff Geldien Staff Assembly President jgeldien@lawschool.gonzaga.edu 509-313-6121	-First Email Communication Sent 10/31/13 -In process of scheduling meeting for the week of the 11/11/13.
Campus	Butler University	Staff Assembly	http://blogs.butler.edu/staffassembly/	Josh Downing Chair jdowning@butler.edu 317-940-6144	-First Email Communication Sent 10/31/13 -Meeting Scheduled for 11/11/13 at 8AM PST (11AM EST)

Appendix B
Initial Reach-Out Communication

Dear «GreetingLine»

My name is Gerson Gomez, and I am a delegate of the Council of University of California Staff Assemblies (CUCSA). I am reaching out to you to see if you would be interested in engaging in a discussion about University Staff Assembly/Association best practices. We believe that our organizations can benefit mutually from an open dialogue. Our hope is to collaborate with «Institution_Name» to construct new benchmarks that will enhance our operations.

The purpose of CUCSA's existence is to improve communications amongst University of California (UC) administrators and staff, and between staff at different UC locations. The UC system has campus specific staff assembly's each run by a locally elected executive board. CUCSA is comprised of elected officials from the various assembly's. Since its inception, CUCSA has benefited from the collective pool of knowledge from across the UC system. However, we would like to engage with comparable organizations outside of our system to formulate partnerships that foster idea exchange and help us learn new ways to better serve the staff that we represent.

Would you be available for a phone call to discuss this further next week? If so please let me know what days and times work best for you and I'll be more than happy to accommodate. We appreciate your time and your consideration. We are excited about the opportunity to partner with you and the «Staff_Organization» of «Institution_Name»!

Kind regards,

Appendix C
Meeting with Deserae Frisk – Colorado University System Staff Council
November 8, 2013

- 3 groups reports to regents and president
 - Each group provides information to regents and president for changes
- The University of Colorado System Staff Council represents all staff
- Each campus can have one or two groups to make sure all staff are represented
- Appointed governing body
 - Student governance group
 - Faculty governance group
 - The University of Colorado System Staff Council
 - Bring issues and solutions to regents system wide leadership
 - Subcommittee with specific charges
 - Policies
 - Outreach and communication to staff
 - Career progression
- The Entire System Staff Council is comprised of 12 members
 - Representatives are elected or selected at each campus (each has its own process)
 - There are 3 elected officials per campus
 - Officials serve 3 year terms → elections are staggered every year so you're looking at 1 or at most 2 newly elected officials per year at each campus
 - Each campus determines how they align organization
 - Colorado University System Office is equivalent to the Office of the President
 - Human resources for the system group they represent (?)
- Denver is a complex campus
 - Medical campus and downtown center campus
 - Two other institutions share the campus space, a state college just became a university (Metro state university), and community college
 - A governing space body exists to help allocate up the space to all entities
 - Colorado University is getting in the process of acquiring a new building for Colorado University only use
 - Colorado University at Boulder is the flag ship school in the CU system
 - Denver Campus Staff Council is having difficulty getting staff at other sites (Medical Campus) to participate.
 - Campus does provide shuttle service remote sites
- Deserae Frisk represents the executive board

- She is the Chair of the System Staff Council and as such is a non-voting member
- The Previous Chair is also a non-voting member
- Executive board consists of the Previous Chair, Current Chair, Vice-Chair, Treasurer, and Secretary (5 positions)
- The organization tries to maintain representation on the executive board of all 4 campuses, however it may not always work out that way
- Chair of Colorado University System Staff Council attends regents meeting and report to them
- Fall ANNUAL retreat → looking at the past, what were the issues that keep recurring within the group
 - Day and half business meeting of the year
 - All of the councils have to have their representatives decided (all voting is complete by August)
 - Good time to get everyone to just spend about each other
 - History of the organization and outlines of the year
 - Participant of the retreat are subject to a large number of presentation
 - This year's retreat focused on future planning
- Campuses rotate the responsibilities for large meetings (one for spring another for retreat)
- Spring conference and award ceremony - open invite to all the staff councils. This facilitates discussion and networking between staff council members. Increased collaboration and best practice sharing.
 - This practice helps reduce campus perception of governing body members as talking heads
 - Makes things more real to local council members
 - Facilitates more inter-campus collaboration
 - Help maintain the communication pipeline
 - This is a larger scale event because system leadership shows up
- Monthly meetings rotate across campuses (Build into rotation redacted online web meeting within those. Travel to each campus once a year; get a feel for the campus, what looks different, and business meeting twice a year. (10 true business meeting a year)
- Executive board meets as needed
- State wide liaison committee for the classified staff group (Colorado University Staff Council does not advocate on behalf of this group)
 - Member meet quarterly
 - CU, CSU, Durango and Alamosa,
 - Statewide liaison group to talk about classified issues across the state
 - Interesting model
 - Institutions that are normally competitors to come together for staff issues
 - Group is represented by a state-wide liaison committee

- Follow-up meeting
 - Deserae will notify The University of Colorado System Staff Council of our communication and look to obtain their approval to proceed with an information exchange with CUCSA.

Appendix D
Meeting with Josh Downing – Butler University Staff Assembly
November 14, 2013

Point of Contact: Josh Downing, Chair of Butler Staff Assembly

- Fairly new group in 2001
- The organization is trying to find its place
 - New president at Butler, only in place for the last 10 months
- Staff Assembly has just recently gotten to the table, with respect to having a voice on the president's executive council.
- Executive council is comprised of the VP's and Deans
 - Faculty senate (2 seats)
 - Staff assembly – Chair serves as an ex-officio role
 - Not a lot to say in the governance in the university
 - Wants to see what they can offer
 - The body helps develop the universities overall strategy
- What are the functions of the Staff Assembly:
 - Professional development
 - Brownbag lunches with sponsors (how to prep house for sale, how to use google.docs, finance tips)
 - Advocate for Staff
 - Considered "the voice of staff" → no longer use the term because it has a union connotation
- Josh recently stepped into the chair role
 - Josh meets quarterly with the president and VP
 - Josh has a monthly with executive director of HR
 - Making progress in a few different areas
 - Trying to establish a sense among HR that Staff Assembly is there to help their efforts
 - Previously had a bad relationship with HR/ trying to mend relationships
 - The general consensus on the campus was that HR Didn't do anything
 - Staff thought that Staff assembly was formed to pick up the pieces that HR left behind
- 13 member executive council → non represent staff
 - Represented staff a very small campus
 - Stage Hands are the only represented
 - Butler Staff
 - Social committee
 - Having a happy hour
 - Organize a Big Relay for life event → 15K

- Day of serve in the spring time
- Organize a community service event at a local public school
- New staff mentor/mentee programs
 - 6 month program
 - Orient people expose them to entire university
 - Set them up with mentor (ambassador)
 - Mentor takes mentee to lunch at the union
 - Vice president of student affairs or dean of students takes part in the causal lunch
 - Mentor takes mentee on tour of campus
 - Stay in contact with mentee (feel an instant connection)
 - Promote the Universities Family feel → pull them into the family right away
 - Six-person committee is responsible for formulating the matches. No set process to determine matches. Council simply asks people or knows people who would be interested in participating. The program is extended out to new faculty as well.
 - Butler also provides a care package to the mentee
 - Staff assembly is working closely with new HR director; the mentor program acts as a supplement for the onboarding process.
 - Looking to further integrate efforts with HR.
- Employment affairs
 - Process improvement project
 - 12 items that are looking to be addresses
 - IT department has actually been working on resolving some of the identified issues, but there is a lack of transparency at IT department, no one outside of the IT department was aware of their efforts.
 - A lot of animosity
- Josh indicated at the close of the meeting that he is interested in moving forward with an idea exchange.

Appendix E

Follow-up Communication

Good afternoon _____,

I am enthusiastic that we were able to connect and that you have attained the appropriate approved needed to move forward with this collaboration!

I also have some encouraging news to report. We recently had our Council of University Staff Council (CUCSA) meeting. The meeting took place last week at the UC Riverside campus, from Wednesday December 4th through Friday December 6th. The feedback from the meeting was overwhelmingly positive with regards to our progress collaborating with _____. My colleagues are in agreement that there is much to learn from interactions with organizations that share parity.

I have to say that after our initial conversation I have a good general understanding of _____. I felt that our discussion demonstrated that we had a great deal of parallelism, from academic culture to challenges in employee engagement at different levels. I would like to initiate an exchange of our strategic documentation. Review of the aforementioned information will help each of us better comprehend our organizational structures. I am providing links to CUCSA's strategic document below.

Subsequent to the strategic documentation exchange, I propose that we set up a meeting to discuss current events taking place within our system-wide councils. I would like to suggest that we exchange a one page document prior to this discussion, containing our council's events and relevant issues. The exchange should take place a few days before our discussion, if possible. As part of the discussion let's dig into one or two aspects that are going particularly well and one or two areas of improvement. We can then share the information discussed to our respective councils.

What would like for us to take away from that meeting is twofold:

- First- I am optimistic that our collaboration will facilitate the identification of organizational best practices.
- Second – I would like to see our council's work as a consultation network. I don't expect that we will solve all our issues, but there is a good chance that we can provide each other insight on how addresses development areas.

I want to utilize a flexible framework that encourages a natural dialogue. Please let me know what you think of the proposed structure, more than happy to tweak it to suit our needs.

With regards to setting a date for our follow up meeting, how does the second week of January work for you? I will be traveling out of the country this weekend and returning on January 2nd. This will give us enough time, post holidays, to write our updates document as well as give us sufficient time to familiarize ourselves with the strategic documentation exchanged. While I will be checking my email on a limited base during the next few weeks, I will keep an eye out for your response.

Looking forward to working with you!

Best,

Gerson Gomez

Links to our strategic documentation

[By-Laws: Last amended December 5, 2008 \(pdf\)](#)

[Organizational Overview \(pdf\)](#)

[Junior Delegate Information Sheet \(pdf\)](#)

[Strategy Plan](#)

[Work Group Procedures](#)

Appendix F
Butler University Information

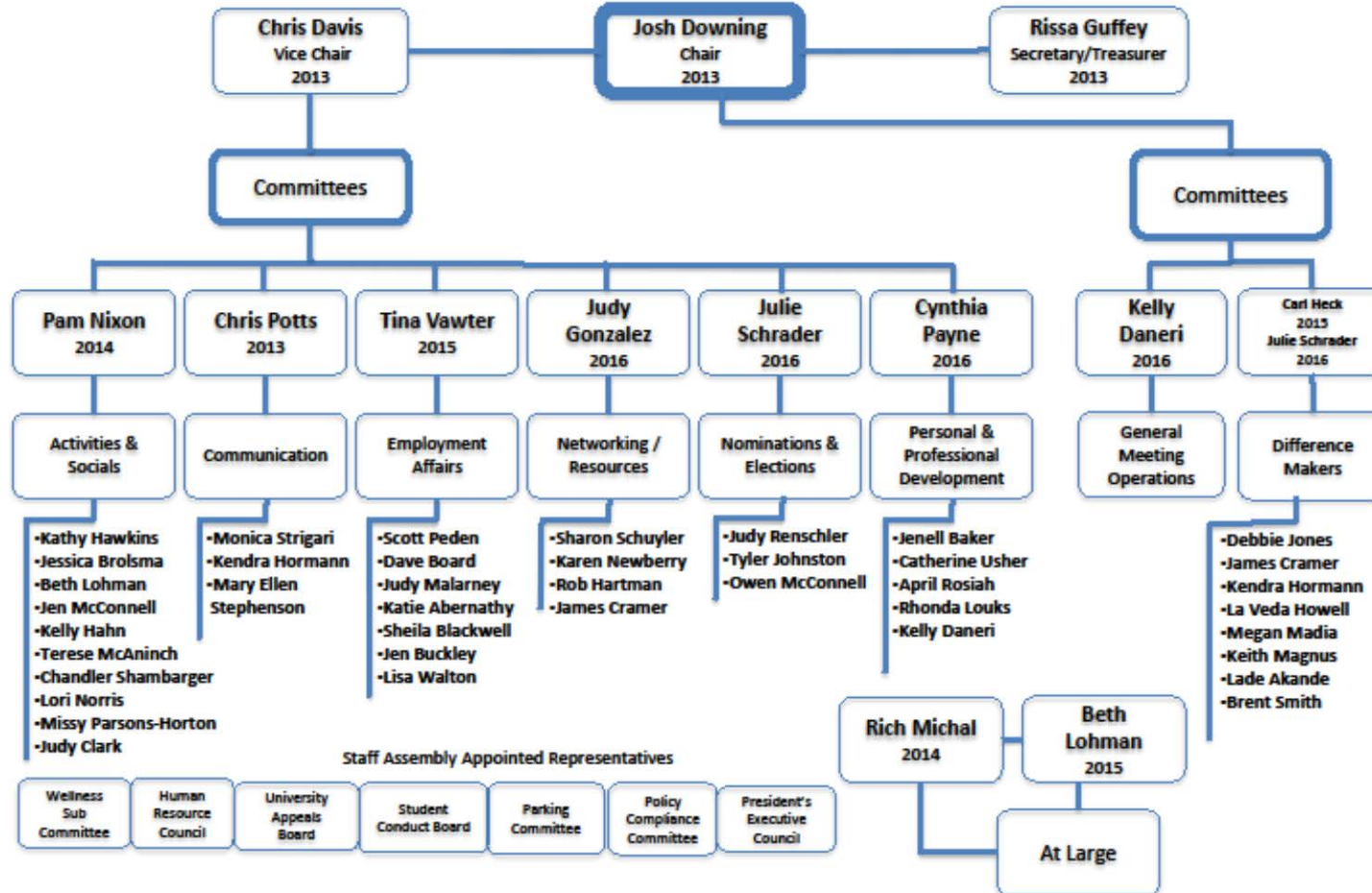
It was great talking with you today. Attached you'll find our org chart. On our website <http://blogs.butler.edu/staffassembly/> our bylaws are listed under "About Us". Click on "Process Improvement Document" to see what we're currently addressing. This is a working document and constantly evolving. Our President and VP of Finance have bought into it, but it essentially comes down to what resources are available. I definitely look forward to our continued conversations. I know we can learn quite a bit from your assembly.

Best,

Josh Downing
Chair

Butler University
Staff Assembly
2013 - 2014

Appendix G



Appendix H
Colorado University System Staff Council By-Laws

ARTICLE I - NAME

This Council was established as the Inter-Campus Staff Council in 1973 at the request of the Board of Regents and is now known as the University of Colorado Staff Council (UCSC). The Council was acknowledged in the Laws of the Regents on September 26, 1973.

ARTICLE II – OBJECT AND PURPOSE

- A. To serve as a liaison between the various staff councils and the President of the University of Colorado and the Board of Regents.
- B. To act as the inter-campus coordinator for any proposed action by individual campus staff councils that may have University-wide implications.
- C. To provide a means of exchange relative to issues of mutual concern among staff, faculty and administration of the University.
- D. To consider and recommend methods and means by which conditions of employment may be improved and operating efficiency increased.
- E. To respond to matters of concern presented by the President and the Board of Regents of the University of Colorado.
- F. To keep informed of legislative actions that directly concern the staff of the University of Colorado and to propose actions and/or make recommendations when appropriate.
- G. To communicate and represent the principles, attitudes, and activities of the staff to administration, the faculty and the public.

ARTICLE III – MEMBERSHIP

Authority of the UCSC membership is vested in the Board of Regents. Time taken by classified staff representatives for regular and special meetings during normal working hours may be construed as administrative leave.

- A. Membership on the UCSC shall consist of three representatives and one alternate from each staff council and be comprised of classified and professional exempt staff. Each member has one vote except that the alternate votes in the absence of a representative. The members are to be selected by each staff council.
- B. The immediate past chair of the UCSC shall be a member of the UCSC and shall serve in addition to the regular members from his/her individual staff council.
- C. On a case-by-case basis, membership may be offered to other staff of the University of Colorado upon a three-fourths vote of the Council.
- D. Representatives will serve for a term of three years and alternates for one year, beginning at the time of the individual staff council elections/appointments.
- E. The term of any member of the UCSC shall become vacant upon resignation, removal by two-thirds vote of the Council, or termination of service from the University. The individual staff council in which the vacancy occurred shall immediately fill a vacancy.

F. Members may be censured or removed by a two-thirds vote of the Council for violation of University regulations or unacceptable conduct. Issues of violation of University regulations or unacceptable conduct will be brought to the Council as appropriate.

G. If a member is absent for three meetings in any consecutive twelve-month period, she/he will receive a warning that if a fourth absence occurs within the twelve-month period, the Executive Committee may remove the member from the Council.

H. Ex-officio member:

1. *Definition:* the ex-officio member(s) shall be a non-voting member(s) selected due to the unique knowledge, expertise, or contribution that he/she can bring to the University of Colorado Staff Council (UCSC).
 2. *Selection:* the UCSC has the option to elect an ex-officio member(s). The voting members of UCSC through secret ballot will elect the ex-officio member.
 3. *Term:* ex-officio member(s) will serve on a one-year term beginning July 1st. There will be no limit to consecutive terms.
 4. *Removal:* ex-officio members will be subject to Article III, Sections F and G.
- I. An officer-elect whose term as representative or alternate expires prior to the commencement of his or her term as officer shall serve as a member without a vote.

ARTICLE IV – OFFICERS

A. The chair shall:

1. Be responsible for the agenda for each regular and any special meeting.
2. Preside at all meetings and enforce all regulations and policies governing the procedures of the UCSC.
3. Appoint necessary committees.
4. Prepare a report to be presented by the chair or a designee of the chair at the regular meetings of the Board of Regents.
5. Be responsible, with the Executive Committee, for setting the budget.
6. Appoint and supervise the recording secretary.
7. Oversee and approve UCSC record-keeping and communications.
8. Be responsible for calling Executive Committee meetings as needed.
9. The chair is only allowed to vote in the event of a tie or to fulfill quorum requirements.

B. The vice chair shall:

1. In the absence of the chair, have all the powers, prerogatives and responsibilities of the chair.
2. Assist the chair with committee assignments and activities, and in setting Council priorities.

3. Serve as UCSC parliamentarian following Robert's Rules of Order.
4. Serve as chair of the UCSC Service Excellence Awards (SEA) Committee.

C. The treasurer shall:

1. Work as part of the Executive Committee to set a budget.
2. Provide a treasurer's report at each UCSC meeting.
3. Authorize and record all expenditures.

ARTICLE V – MEETINGS

- A. There shall be a regular monthly meeting of the UCSC. Meetings may only be cancelled by a majority vote of the members.
- B. The location of regular meetings shall rotate among all campuses of the University.
- C. Eight (8) voting members shall constitute a quorum, with at least one member from each individual staff council.

ARTICLE VI – ELECTION OF OFFICERS

- A. Officers of the UCSC to be elected shall be the chair, the vice chair, and the treasurer.
- B. The chair shall serve a two-year term. The vice chair and treasurer shall serve one-year terms. Officers are eligible for re-election. Candidates shall be formally nominated at the April regular meeting. Candidates must be currently serving on the UCSC at the time of their nomination. Votes shall be cast by secret ballot or electronic mail and returned within six (6) days. The results will be reported to the Council immediately by the chair of the Elections Committee.
- C. Terms of the office shall commence with the July meeting.

ARTICLE VII – COMMITTEES

- A. The Election Committee and the Executive Committee shall be the two standing committees, with special committees as necessary, to ensure historical continuity of UCSC activities.
 1. The Election Committee provides for nominations of officers and oversees elections as prescribed in the by-laws, Article VI. The Election Committee and its chair shall be selected by the UCSC.
 2. The Executive Committee acts as a steering committee for new issues, a sounding board for general staff grievances, the steering committee for UCSC activities and the budget-setting authority. Membership of this committee shall consist of the chair, vice chair, treasurer and past chair.
- B. Each Council member shall serve on state, University, and Council committees and task forces on an "as needed" basis. Members shall choose assignments or be appointed by the Executive Committee.

ARTICLE VIII – PARLIAMENTARY AUTHORITY

The rules contained in the current edition of *Robert's Rules of Order Newly Revised* shall govern the Council in all cases to which they are applicable and in which they are not inconsistent with these by-laws and any special rules of order the Council may adopt.

ARTICLE IX – AMENDMENTS

A. Amendments to these by-laws may be proposed, in writing, by a UCSC member for discussion at any meeting. A copy of such amendment(s) shall be provided to each UCSC member and shall be voted upon at the next meeting. A copy of the amended by-laws shall be furnished to the Board of Regents and President of the University of Colorado.

B. Amendments are ratified by a ten (10) member vote of the UCSC, provided that two members from each individual staff council approve.

ARTICLE X – FINANCES

A. The UCSC shall provide travel expenses for its members for authorized UCSC business.

B. A yearly budget proposal will be presented to the President of the University of Colorado.

University of Colorado Staff Council By-Laws*

Original By-Laws adopted by the Regents, September 16, 1973.

Revised By-Laws adopted by the Inter-campus Staff Council, August 13, 1975.

Approved by President Rautenstrauss, September 5, 1975.

Ratification of By-Laws, June 9, 1978.

Ratification of By-Laws, August 31, 1979.

Name changed By-Laws amended, October 6, 1988.

Amended By-Laws ratified February 1, 1990.

Amended By-Laws ratified January 4, 1994.

Amended By-Laws ratified November 6, 1997.

Amended By-Laws ratified January 10, 2003.

Revised By-Laws adopted May 1, 2003.

Amended By-Laws adopted March 3, 2005.

Amended By-Laws adopted January 10, 2008.

Amended By-Laws adopted March 5, 2009.

Appendix I
CUCSA Updates for UC Irvine, January 2014

- **Open Enrollment and Benefits Town Halls (Update)**
 - Recent reconfiguration of medical plans offerings, leading to the elimination of Anthem Blue Cross options. Anthem plans considered “Cadillac Plans” under the Affordable Care Act.
 - New plans introduced including the UC Care insurance program – a comprehensive PPO program offering services from UC physicians/medical centers as well as the Blue Shield Preferred network.
 - OP will be conducting a survey on our full benefits package (medical, dental, vision, legal, etc.) in the spring. , CUCSA will be asked to assist.
 - Our office of the president partnered with CUCSA, local Staff Assemblies and Campus Human Resources on a benefits town hall tour, aimed at promoting awareness about the changes to the benefits plan options.
 - This is one of the first large scale changes that CUCSA was leveraged as a direct communication medium. Our request is to be incorporated into the fold earlier into a decision making process.
- **UCPath (Update)**
 - UCPath is a University of California project to implement a single payroll, benefits, human resources and academic personnel solution for all UC employees.
 - New Project manager appointed.
 - Project undergoing a health check. The project plan and timeline are being reevaluated.
 - CUCSA will be looked at as a potential partner for the Change Management initiative.
- **Staff Advisors to the Regents (Update)**
 - The Staff Advisors goal is to foster two-way communication between UC staff and the Board. Staff Advisors are selected from all staff and non-Senate academic employees, and are appointed by the President in consultation with the Chairman of the Board. Staff advisors serve as non-voting member in designated Regents' committees, and are expected to provide direct input into the Board's deliberations and decisions.
 - Regents have full powers of governance and authority. 18 regents are appointed by the governor for 12-year terms; One is a student appointed by the Regents to a one-year term and; Seven are ex officio members — the Governor, Lieutenant Governor, Speaker of the Assembly, Superintendent of Public Instruction, president and vice president of the Alumni Associations of UC and the UC president.
 - Increase the role of Staff Advisors to take part in the selection of the UC President. At present neither faculty nor staffs have sit on the search committee.

- Staff advisers are here to advocate on CUCSA behalf.
- CUCSA executive board requested Staff Advisors to be present at all further CUCSA meetings.
- **Engagement Town Halls (Update)**
 - 2012 System-Wide engagement survey results are being disseminated at campuses via town halls.
 - Engagement Survey will be repeated in June 2014 or 2015 as a means of gathering comparative, data and view trends.
 - CUCSA Delegates have been charged to produce programming that to enhance engagement. Delegation will partner with local campus leadership to formulate work groups.
- **Quarterly Meeting (Operations Practice)**
 - Opportunity for the delegation to get a feel for the hosting campus culture.
 - Local Speakers often comprised of local leadership
 - Examples: Chancellors, Deans, local Assembly representatives.
 - Campus tours and social events at campus locations
 - CUCSA Executive Board secures relevant speakers for quarterly meetings
 - Presenters include senior level leadership from the Office of the President (Examples: UC President, VP of Human Resources, UC Regents, Staff Advisors to the Regents ETC)
 - CUCSA Delegates are expected to engage the speakers
 - During formal meetings via insightful commentary and questions
 - During informal occasions through casual conversation

Questions:

- Division of Labor: How do you determine when local staff assembly elevates a matter/issue to your system wide assembly? Is there a process?
- What entities or positions do you normally partner with?
 - Campus Human Resource Officers (AVC)
 - Chancellor's Office
 - Staff Assemblies
- Best Practices
 - How are your meetings run, do they follow a particular protocol?
 - Roberts Rules of Order?
- Are there any other organizations that you believe have some overlap with your system wide staff assembly body?
- Review of Operational Challenges
 - Recruitment?
- What do you recommend for this partnership moving forward

Appendix J
Meeting with Deserae Frisk – Colorado University System Staff Council
January 29, 2014

About University of Colorado System Staff Council

- The University of Colorado System Staff Council (UCSSC) is a governance group that works directly with other governance groups and executive leadership to make decisions that impact the entire University of Colorado (UC) System. UCSSC does not have the ability to stop a candidate selection, so if a decision has already been made by executive leadership UCSSC cannot impede the outcome. UCSSC does have direct input on system decisions and executive recruitment.
 - Example: Recruitment of the Vice President of Advancement
 - The UC President wanted to speed up the search process
 - The president made the selections and vetted the final candidate
 - The final candidate was brought on for interviews, and UCSSC was given an hour to meet with and interview the candidate.
 - UCSSC executive board was content with the candidate, but not pleased with the process or lack of input.
 - UCSSC, by virtue of their status as a governance group, as determined by their charter, should vet the candidates and be represented on the search committee. (they are to have a spot at the table)
 - The UC president asked UCSSC to waive their involvement in the vetting processes.
 - There were 3 or 4 eligible candidates, but UCSSC only met the final candidate
 - The only personnel involved in the vetting and hiring decision were the chancellors, president and some CHRO's.
 - By the time UCSSC met the finalist, she had already been hired, and her meeting with UCSSC was only a formality.
 - As a result the UCSSC executive board has been outspoken that they do not want to take part in another redacted process.
 - UCSSC leverage points:
 - They are part of the UC governing body
 - It is written into policy that UCSSC have a seat at the table, with other governance groups

Structure

- UCSSC reports to both the UC Regents and the UC President
- Executive Sponsor: The System-wide Vice president of Human Resources, Employee Relations and Information Technology.
 - Sponsor is responsible for UCSSC budget.

Determining Local vs. System-Wide Issues

- Each local assembly has local meetings, each entity brings up issues at the UCSSC monthly meeting
- UCSSC Delegates, acting on the interests of the local assembly, can decide what campus concerns they want to elevate to system-wide
- The entire delegate body of UCSSC determines what they move that forward

Process

- The UCSSC executive body queries the delegation on where there is divergence or commonality around the presented concerns.
- If the delegates cannot confirm either at the UCSSC meeting, delegates are requested to query their local staff assemblies to sort out the issue.
- At the following meeting, delegates are asked to report their findings so that the UCSSC can determine if the original concern is a campus specific or evident through the system.
 - If the concern is campus specific then it's up to the local council to work with their local leadership
 - If it's prevalent at amongst multiple campuses then UCSSC can elevate the issue to the UCSSC executive sponsor.
 - If this is a policy issue the executive sponsor will invite policy makers to discuss policy with UCSSC.
 - The Executive Sponsor will also mediate the process
- Depending on gravity, and timing, UCSSC can work with/through sponsor or elevate issue to the regents.
 - If UCSSC believes the issue is important enough it can elevate the issue directly to the regents.
 - The entire council votes to determine what goes to the regents.
 - UCSSC will not take issues to the regents that are frivolous; all concerns need to be quantifiable and grounded with facts.
 - Additionally, the UCSSC may involve other governance groups to establish unites front.
- Issue Elevation Path: Local Assemblies → UCSSC → Executive Sponsor → President → Regents
 - UCSC has an active executive sponsor that is willing to deal with the issues brought forth by UCSSC.
 - Being engaged is beneficial to the executive sponsor as it makes them look good.
 - Executive Sponsor cannot control information flow
- Most concerns do not end up being system-wide issues, so most of the work falls back on the local staff organization
- System-wide issues raised at UCSSC tend to be something that executive leadership are already working on or intend to work on; UCCSC can then take an active role to expedite the process along

Staff Advisors to the Regents

- 1 Legal aid and 1 Executive assistant
- The advisors to the regents have recently taken on a more active role in bringing the governance chairs up to speed prior to Regents meetings via teleconference.
 - Examples of preparation include:
 - What staff advisors believe will be on the Regents meeting agenda
 - Ask if the governance chairs have any information they would like incorporated into the meeting
- Staff Advisors do not sit on the UCSSC
- Regents are elected by the state
 - 2 at large
 - 7 are voted on by district
- 9 regents + President (Not a voting member)

Partnerships

- The UCSSC president indicated that partnerships are a development area for their organization
- The main medium for partnership with campuses is the UCSSC delegation, comprised of local representatives
 - Staff campus councils are invited to UCSSC meetings as non-voting participants, however campus staff rarely come
 - Note the UCSSC meetings are open to all Staff
 - Sometimes high ranking officials from local campuses attend UCSSC meeting to introduce pressing issues.
- Student group (Governance Group)
 - Currently very limited student / staff partnership
 - Students and staff don't have common issues
 - Student group does not have active representation
 - Some dotted line situations exists
 - Green parks at medical campus
- Faculty Council (Governance Group)
 - More partnerships opportunities
 - Staff and faculty have common issues
 - Both organizations have a stable leadership and structures
 - Have tried to partner → execution issues on partnership models → good idea but not working well
 - Had a staff representative sit on Faculty Council
 - Had a faculty member sit on UCSSC
- There are other groups that try to leverage UCSSC to "fix things"
 - Office of policy and efficiency
 - external groups have tried to chariot things through UCSSC

Dealing with Budget Cuts

- Prioritization Strategy Deployed For Academic Offerings developed at UNC (northern Colorado)
 - Academic program prioritization utilizes a quadrant methodology to identify class value and cost. the following questions need to be answered to determine the appropriate placement for classes in the quadrant structure:
 - How much do the classes cost to run?
 - What is the school giving or getting back?
 - Is the class shrinking or not doing well?
 - Does the class add value?
 - The program helps prioritize programs to determine what should receive funding, and what should not.
 - Regents are requiring all campuses to conduct the analysis, with the exception of medical campus.
- The program has pressured campuses to look to continuing education (cash funding) and outreach.
- The System also introduced a proposal mechanism that allowed staff to submit efficiency program proposals
 - Proposals that became successful projects could net cash prizes for the submitters

Staff Demography

- Colorado is not a union state
- Very little collective bargaining
- Staff lines
 - Non-exempt Classified staff (administrative, clerical , facility services)
 - Staff are part of the state system and as such follow all the state system rules
 - Have groups outside the university that persons can join
 - Exempt professional Staff (managers, professional, supervisors)
 - Staff exempted from state regulation

UCSSC Meeting Procedures

- Generally follow Roberts Rules of Order
 - Relatively lax meetings
 - Voting or challenges follow Roberts rules of order
 - Guest Speakers Generally use an open format – Delegates can ask questions at their discretion
 - Speakers Present
 - Free for all during Q&A
 - Executive Chair has the authority to advance a Q&A session

- UCSSC runs their meetings like a classroom (raise hand to ask questions)
- Smaller number of delegates so they have not found a need to institute a special process
- Voting is informal → Partly stems from executive chair → Culture is different as well

Regents Meeting Procedures

- Participants at regents meetings can jump in at their discretion
 - Meeting follows an open forum format
 - Participants sit at U-shape table
 - The center aisle has a podium
 - Governance groups sit at the front of the center table
 - Eligible speakers sit in surrounding area
 - It is generally understood that persons other than the Regents don't speak unless spoken too.

Partnership Moving Forward

- Council's working as a consultation network
 - Set up quarterly meetings
 - Discuss anything that is brought up at meetings that can benefit from external input
 - Exchange 1 page document prior to this discussion, containing our council's events and relevant issues

Campus	UCOP	UCB	UCD/UCDHS	UCI	UCLA
Annual Budget	2013-13 = \$10k (inc. \$5k of CUCSA quarterly mtg. expense) 2013-14 = \$6,950 (increase of \$1950 from previous year)	\$12,500 In host years for CUCSA, the sponsor supports the event with additional funding.	UCD: I don't know off the top of my head UCDHS: \$12,000	\$60,000	\$6,500
Funding Source (list)	HR	Assistant Vice Chancellor, Human Resources	UCD: General funds; endowments; fundraising UCDHS: HR	PEVC's office	HR
Membership (inclusive or exclusive)	Inclusive	Inclusive. All staff are staff assembly members.	UCD: Inclusive UCDHS: Inclusive	Inclusive, but only non-represented staff can serve as elected council leadership	Inclusive but only represented emp may serve on the
How do members join?	Steering Committee members are elected Every staff person is a member of OPSA	Bylaw, Membership II: All staff employees, regardless of appointment type and including non-Senate non-teach appointees shall be considered members of BSA. Retired staff employees and other applicants may become BSA members if approved by the Council but are not eligible for election to the Council.	UCD: All staff are members; call for committee members; committee chairs; staff reps on external committees; event volunteers UCDHS: Anyone interested can come to a meeting and turn in an application to be on Executive Committee	Automatically a member	By signing up for Staff Assembly Li
Dues (amount)	None	None	UCD: N/A UCDHS: None	None	None
Delegate selection (process)	Separately elected position - 2 yr term, 1 yr as Junior, one as Senior	Election of CUCSA Delegates is conducted by the Chair-Elect, who solicits nominations at the last Council meeting in April. Candidates are elected from the Staff Assembly Governing Council membership by vote which must be completed by the last day of May.	UCD: Application; Exec Committee review; Vice Chair appoints board or executive committee recommendations UCDHS: Position elected along with other officers (chair, vice chair, treasurer, secretary) to 2-year term	Annual elections in April	A candidate runs election to the Pr Elect position. A vote. Once the ca elected, they serv year term: Presid (CUCSA Jr. Deleg; President (CUCSA Delegate), and Im Past President (n CUCSA delegate)
Regular meetings with campus leadership? (If so, with whom and how often?)	Yes. Meetings w/EVP Brostrom and AVP Reese	Sponsor, Assistant Vice Chancellor, Human Resources meets with Governing Council once per semester.	UCD: Quarterly group w/chancellor and senior leaders. Monthly chair w/chancellor Monthly chair w/CHRO Monthly chair w/Academic Senate Chair UCDHS: Quarterly update with chancellor	Yes. Chancellor - quarterly; PEVC - every 2 months; CHRD - monthly	Monthly meeting of HR
Annual programming and staff support	See attachment	Kickoff event for new Governing Council.	UCD: TGFs Picnic; Scholarship/Recognition	Staff Picnic-August Halloween; Costume	Annual Staff Picn Monthly Learn-a

Campus	UCOP	UCB	UCD/UCDHS	UCI	UCLA
activities (list)		No host lunches: holiday, Chinese new year, spring as final annual meeting. Programs: Excellent in Management, Mentorship and Chancellor's Chat Annual Voices at the Table for CUCSA/staff advisor visit.	Reception; Group events (Six Flags, A's game, etc.) UCDHS: Thank Goodness for Staff Picnic; Holiday Bazaar, Gifts from the Heart; Giving Tree	Contest; Pancake Breakfast; Staff Scholarships; Helping Hands; Discount Sports & Arts Event tickets	Series; Chancellor's Hall; Breakfast w/Chancellor; Lunch w/Medical School; VIP Women's Basketball/Volleyball Reception with M Small Business R Fair; Holiday Toy Casino Night; Awards Scholarship Ceremony UCLA Has Talent Competition; Em Research Speaking True Bruin Move Groove 5K Run/V
Additional funding sources (list)	N/A	Small amount of savings from prior dues-paying period. Managed by Governing Council Treasurer.	UCD: Funding for scholarships, and picnic UCDHS: Vendor tables at TGFS picnic (2013=\$5500) for staff scholarship fund; Books are Fun book fairs	Fundraising: bake sales, candy sales, wine tastings, entertainment books	Staff Scholarship (funded by Staff Assn., and fund events such as the Business Resource and Casino Night Chancellor's Excellence Service Awards - (funded by Chancellor's office)
Transfer of information to junior delegates (process)	Sr. Delegate briefs (and passes prep materials) to Jr. Delegate before the first meeting	Information sharing from Senior to Junior Use CUCSA info posted in Resources.	UCD: N/A – nothing formal because always 2 juniors and 2 seniors UCDHS: Onboarding by CUCSA leadership	Transition meeting prior to intro meeting w/CUCSA leadership. Provided info and docs from previous year.	No formal process
Mission statement (do you have one?)	We promote the interest and welfare of all staff employees at UCOP. OPSA supports UC's mission by encouraging communication between staff and the administration and other members of the university community on matters of interest to staff employees, in accordance with California laws and regental policy. Our activities provide forums where staff at all levels can discuss issues of mutual concern, and offer opinions and recommendations on policies, processes and programs.	The Berkeley Staff Assembly creates community, champions staff interests, and provides opportunities for networking and development. We are a non-dues organization made up of all UCB staff employees.	UCD: None UCDHS: Yes	Yes	UCLA Staff Assembly organization "for staff." Through educational, social, community programs foster staff engagement support of UCLA's The benefits include leadership opportunities, networking, personal professional development, recognition, and involvement, to name a few. All staff is encouraged to be part of our community.
Committees that assembly members sit on (list)	Communications Programs Staff engagement	Career Development Committee; Excellent in Management; Mentorship Program; Program & Events Committee; Web & Publicity Committee	UCD: transportation (TPAC); recreation (CURB); technology (TIF); diversity; various senior recruitment UCDHS: Campus Community Council and other ad hoc committees (recruitment advisory, etc.)	-Budget Committee -Chancellor's Advisory Committee on the Status of Staff (CACSS)	Early Care and Education Advisory Board; Wooden Center for Environmental Governance; Student Conduct Committee on Diversity UCLA Sustainability Committee; UCLA Committee on LGBTQ Affairs

Campus	UCOP	UCB	UCD/UCDHS	UCI	UCLA
Types of outreach assemblies perform (list)	See attachment 1 (examples include Town halls)	Distribute EIM (Excellent in Mgmt.) flyers in 3 languages to promote nomination by staff for supervisors/managers; Broadcast email for EIM nomination and start of Mentorship Program cycle; Strategy to implement off-site location visits and/or streaming of events.	UCDHS: New employee orientation	Community Relations Committee-does various events for charities in local community	Chancellor's Town Halling at various (Wellness Fair, E Veteran's Day, I H Walking); Partner w/UCLA Volunteer
Common ways of communicating with staff at large (list)	See attachment 1 (examples include Town halls, Staff Appreciation Week, and UCLink (OPwide newsletter))	Weekly announcement List compiled by requests from staff; Sponsor all-staff email for major events 1-2 per year.	UCD: website; social media; emails; newsletters UCDHS: Articles on UCDHS website	-Emails -Flyers at events -Presentations to depts. -Quarterly newsletter	Staff Assembly List Facebook Account

Campus	UCR	UCSB	UCSC	UCSD	UCSF
Annual Budget	\$49,805	~ \$12,000 \$5k is for staff citation awards We currently get about \$3K (in addition to \$5K for awards). We have asked for \$3K more and were told yes (still waiting to see dollars)	\$20,000	\$1,615.25	\$7K
Funding Source (list)	\$12,500=Chancellor Funds \$12,500=Community Partner Fair Fundraiser \$14,325=In-Kind Contributions \$7,000=Society '54 / Other Donations \$ 3,480=Other Fundraisers	VC of Admin Services	Chancellor's Office	Office of the Vice Chancellor - External and Business Affairs	HR
Membership (inclusive or exclusive)	Inclusive	Inclusive. Co-chairs must be unrepresented	Inclusive, but only non-represented employees may serve as Representatives and Board members.	Exclusive	Inclusive
How do members join?	All staff are automatically members of UCR Staff Assembly	Anyone who wants to attend Executive Board meetings can come and we do a very informal vote to add them to the Board. This is due to low interest in past. Board is growing now.	We have a 12-member board elected annually for a 3-year term by all campus. If a non-rep staff person is interested in being on the Board, they submit their name and a statement as to why they want to run in April. An election is held in May where staff vote online. For 2014-2015 we are adding 2 additional spots to increase membership on Board to 14.	Any UCSD employee can join by sending a membership form and \$6 to the Membership Chair. Purchase a Lifetime Membership for \$100 and \$50 will go to staff scholarships. Membership fees help create educational opportunities and expand exciting activities beneficial to all UCSD employment	All non-represented is considered member
Dues (amount)	None	None	None	\$6 annually or Lifetime Membership for \$100	N/A
Delegate selection	President is designated	Co-chairs self-nominate	Separately elected position	Executive Board consists of	Annual election.

Campus	UCR	UCSB	UCSC	UCSD	UCSF
(process)	the Senior Delegate. VP/President-Elect is designated the Junior Delegate. Delegates must be non-represented staff.	and Board votes. Co-chairs are delegates.	- 2-year term, 1-year Junior and one year Senior.	12 regular members and appointed representatives from each active and officially recognized staff associations on campus. Executive Board members are elected by electronic ballot from the regular membership of the Staff Association. Their term of office beginning on July 1 of the year in which they are elected. Board members will serve for one fiscal year.	
Regular meetings with campus leadership? (If so, with whom and how often?)	Chief HR Officer-Quarterly or as needed Chancellor-Quarterly or as needed.	No. Try to meet annually w/VC of Admin Services. We need to work on this.	Monthly with Asst. Chancellor; Quarterly with Chancellor and EVC separate meetings).	Associate Chancellor/Chief of Staff – monthly; CHRO – bi-monthly.	Chancellor’s Cou meeting (quarter meetings with Di HR (as needed)
Annual programming and staff support activities (list)	General Meetings and Service Recognition each quarter; Holiday Party; Staff Who Make a Difference (all year); Departmental Outreach Events for staff who cannot make events due to their positions; Scholarship Program; Staff Assistance Program; Society '54; Staff Ambassador Program	Staff citation awards; ice cream social; Halloween decorating/costume contest; winter social/spring social w/Arts & Crafts Bazaar; staff cookie contest	Staff Appreciation Picnic, for 2013 we added a staff appreciation welcome back breakfast in the fall. Thumbs Up award (peer-to-peer staff recognition).	School supply drive; All Staff picnic; Holiday pancake breakfast; Volunteer Appreciation luncheon; Celebrate the Night (Night Staff Appreciation event twice a year)	None at this time
Additional funding sources (list)		None	None at this time.	One time funding from the Chancellor’s Office for All Staff Picnic; Volunteer Appreciation luncheon; One time funding from the VC; External and Business Affairs for CUCSA meeting and Holiday Pancake breakfast	N/A
Transfer of information to junior delegates (process)	Senior delegate provides transfer of info to junior delegate.	Senior delegate tries hard to orient junior delegate.	No formal process.	Pre-transition meetings with Chair and Ex Officio. New “File of Info & Process” handed forward to new leadership. Ex Officio participation continues for one year.	Past members of executive board t information/mer
Mission statement (do you have one?)	UCR Staff Assembly is an assn. of employees dedicated to promoting the interests and welfare of all UCR staff. It seeks to inform, involve, connect and recognize staff in one of the fastest growing campus in the UC system.	Yes (on our website)	Yes. In support of the mission of the University of California it is the purpose of the UCSF Staff Advisory Board (SAB) to maintain and enhance communication within the University Community on matters of interest to staff employees in accordance with California laws and Regent policy. The constituency of the SAB is understood to be staff employees of the University of California. The SAB is involved in matters of	The objective of the UCSD Staff Association, as a group independent of the administration, is to provide an effective base for staff communication with the administration, faculty, and student, in all matters relating to the welfare and proper functioning of the University in its role as an educational institution by: A. Encouraging staff members to present their opinions on issues that affect the University Community. B. Serving in an advisory	No

Campus	UCR	UCSB	UCSC	UCSD	UCSF
			interest and concern to those who are not exclusively represented and may address matters not within the scope of representation for those exclusively represented.	capacity to the administration on these issues when the Staff Association membership deem is necessary.	
Committees that assembly members sit on (list)	Senior Leadership Search Committees	We do an open call for staff reps for campus committees rather than being just from staff assembly or CSAC. Almost every committee has a staff rep (including search committees). CSAC & staff assembly chairs rank nominees prior to giving names to Chancellor's office.	Campus Committees: Advisory Council on Campus Climate, Culture and Inclusion (ACCCI); Campus Climate Local Work Team; Committee on Sustainability and Stewardship; Council of UC Staff Assemblies (CUCSA); Demonstration Advisory Council (DAC); Diversity Advisory Committee; Outstanding Staff Award; Red Cross Blood Drive; Staff Diversity Group; Second Harvest Food Bank; Student Fee Advisory Committee (SFAC); Student Judicial Board, Title IX Advisory Council, Transportation Advisory Committee (TAC), United Way Committee, Wellness Advisory Board	Advisory Committee on Sustainability (ACS); Bookstore Advisory Committee; Campus Budget Committee; Campus/Community Planning Committee (CCPC); Chancellor's Advisory Committee on the Status of Women; Electronic Information and Communications Policy Committee (EICPC); Faculty and Staff Assistance Program Advisory Committee; Institutional Biosafety Committee; Laser Safety Committee; Light Rail Transit Work Group; Radiation Safety and Surveillance Committee; Transportation Policy Committee; Vehicle Accident Review Board; UCSD Advocacy Committee; University Centers Advisory Board	Post-Employment task force; UCS Search Advisory Committee; UCSF Committee on the Women; Campus Community Center Advisory Council
Types of outreach assemblies perform (list)	Staff Recognition; Dept. Outreach for staff who cannot attend campus events due to their positions (dining, child care, etc.); participation at campus general events (homecoming, Chancellor Fall Welcome)	We try our best to let staff know our involvement in important issues, but this is something we need to work on.	External SAB Elections Committee, Internal SAB Elections Committee; SAB Newsletter & Marketing Committee; SAB Website Committee; Staff Advocacy; Staff Appreciation Picnic; Staff Forums; Thumbs Up Awards	The Catastrophic Leave Donation Program; UCSD's Visual Arts Group; Community service projects; Donation of eyeglasses to MEDICO; Children's toy drive; Career Experiences for High School Students; Scholarship Program (each year, the UCSD Staff Assn. awards scholarships up to \$350 each to eligible UCSD Staff Assn members for completed training activities that aid in their career development); Impact Award; Staff Night w/UCSD Basketball	None
Common ways of communicating with staff at large (list)	Website; email; Facebook; Twitter; Ambassadors	S-list (opt in staff email list); quarterly newsletter; occasionally we get to post to the campus-wide email list; Facebook	Website, email through PIO, Quarterly newsletter, tabling at campus events.	Listserv; monthly meetings; emails to Executive Board and larger membership body	Listserv

Attachment 1

Upcoming OPSA Programs

1. Meet-n-Greet with Senior Management at Monthly Breakfasts (Franklin & Kaiser)

2013 OPSA “New” Committee Completed Programs

1. August 7-9 – Staff Engagement Work Group Brown Bag (Coordinator Jeanie Urban)
2. Sept 6 – Meet-n-Greet with Senior Mgmt at Monthly Breakfasts (Franklin – coordinator Gemma Rieser)
3. Sept 10 – Staff Engagement Kick-Off (Coordinator Jeanie Urban)
4. Sept 13 – Meet-n-Greet with Senior Mgmt at Monthly Breakfasts (Kaiser – coordinator Darlene Alvarez)
5. Sept 23 – UC Undergraduate Admissions and Transfer Path (Coordinator Gemma Reiser)
6. Oct 1 – OPSA participation in Carnival Midway (Coordinator Karla Wood)
7. Oct 7 - Benefits Town Halls (OPSA Co-sponsored – Coordinator Claudia Escobar)
 - 10am & 1pm meetings – 215 total attendees
8. Oct 11 - Meet-n-Greet with Senior Mgmt at Monthly Breakfasts (Kaiser – coordinator Darlene Alvarez)
9. Oct 7 - Benefits Town Halls (OPSA Co-sponsored – Coordinator Claudia Escobar)
 - 10am & 1pm meetings – 215 total attendees
10. Oct 14 – UC Undergrads Admissions Series; Application Personal Statement (Coordinator Gemma Reiser)
11. Oct 28 – Long-Term Care Insurance Brown Bag (Coordinator Peter Forde)
 - Well attended and received: 18 in room, more on ReadyTalk; emails from those who could not attend, requests for collateral afterwards
12. Oct 29 – Staff Engagement Work Group Brown Bags: Career Development (Coordinator Jeanie Urban)
13. Nov 1 – Meet-n-Greet with Senior Mgmt at Monthly Breakfasts (Franklin – coordinator Gemma Rieser)
14. Nov 1 – Staff Engagement Work Group: Performance Management (Coordinator Jeanie Urban)

15. Nov 6 – Staff Engagement Work Group Brown Bags: Communications (Coordinator Jeanie Urban)
16. Nov 7 – Town Hall with President Napolitano (OPSA coordinator Jeanie Urban)
17. Nov 8 – Meet-n-Greet with Senior Mgmt at Monthly Breakfasts (Kaiser – coordinator Darlene Alvarez)
18. Nov 14 – Preparing for Undergraduate Admission series: Paying for College (coordinator Gemma Rieser)
19. Dec 6 – Meet-n-Greet with Senior Mgmt at Monthly Breakfasts (Franklin – coordinator Gemma Rieser)
20. Dec 9 – Tax-Free Retirement brown bag meeting (coordinator Matthew Leet)
21. Dec 19 – UCOP Holiday Party (Matthew Leet and Jeanie Urban participated in the Planning Committee)
 - Dan Scannell now coordinating, will discuss revised format for 2014

Potential OPSA Programs

1. Volunteer opportunities (Darlene Alvarez work-in-progress)
2. Dessert n’ Learn Series – (Gemma Rieser work-in-progress)
 - Initial meeting to discuss program with Cathy, Stella, and Linda Klink
3. Aging and Care Series (Peter Forde)
 - TBD topics and speakers for follow-on meetings
4. Building Safety Series (Matthew Leet work-in-progress)
5. Tours of LBNL/NERSC
 - follow up w/Elizabeth Bautista at LBNL
 - tours held in past were well attended and received
6. Partnership with Oakland (explore with Pete King)
7. Convene meeting with or mixer with Affinity Groups (Claudia)

2013 OPSA Past Accomplishments

1. Jan 17 - UC Admission: Education Tax Credits, Deductions & Savings Options (coordinator Gemma Rieser)
 - Speaker: Nancy Coolidge, Assoc. Director Student Financial Support

2. Feb 5 - UC Admission: Comparing Financial Aid Awards (coordinator Gemma Rieser)
 - Speaker: Nancy Coolidge, Assoc. Director Student Financial Support
3. April 18 - Poetry Reading Open Mic in celebration of National Poetry Month (coordinator Darlene Alvarez)
 - Attendance: 15 participants at Kaiser Bldg
 - Darlene to consider expanding the "reading" into video presentations, mixed media, etc.
4. May 7 - UC Admission: Education Loan Tips (coordinator Gemma Rieser)
 - Attendance: 18 participants
 - Speaker: Nancy Coolidge, Assoc. Director Student Financial Support
5. May 8 - Poetry Reading Open Mic @ Franklin (coordinator Darlene Alvarez)
 - Attendance: 6 participants
6. May 16 – OPSA Elections info session @ Franklin (coordinator Peter Forde)
7. May 17 – OPSA Elections info session @ Kaiser (coordinators Nancy Chamberlain & Darlene Alvarez)
8. June 5-7 – CUCSA Quarterly Meetings (OPSA coordinator Jeanie Urban)
 - Hosted at UCOP
9. June 19 - California Digital Library presentation (coordinator Claudia Escobar)
 - Attendance: 25 participants (including Readytalk participants)
10. June 25 - Town Hall w President Yudof (OPSA Coordinator Jeanie Urban)
11. June 28 – OPSA Steering Committee Elections (coordinator Nancy Chamberlain)
 - 7 ran for office; 6 were elected; 221 people voted