



2013-2014

Local Operations

Workgroup Report

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Executive Summary

Staff is one of the key components of the University of California System. The staff at each location plays a vital role in carrying out the University's mission and ensures that everything runs smoothly. Staff needs a voice to communicate concerns to decision makers, and the Staff Assembly at each location is set up to be that voice.

The 2013-2014 Local Operations workgroup was tasked with examining how the assemblies work and operate. We developed key strategies for each location to develop and maintain so that local assemblies can continue to be a viable resource for staff. Those key strategies are:

- Organization and Structure
- Recruitment and Sustaining Staff Engagement
- Messaging and Communication
- Campus Connections and Relationships

Each one of these categories focuses on a need that some or all assemblies must address in order to successfully represent the staff at their location.

Background

The Council of University Staff Assemblies (CUCSA) is comprised of two representatives from each campus, two from UC Office of the President (UCOP) and two from the Lawrence Berkeley National Lab. These selected individuals are sent to CUCSA from their local assemblies to represent their campus and bring information to and from CUCSA.

A measure for the success of CUCSA is the quality and effectiveness of the local assemblies and how they represent the staff on their campus. In dealing with budget cuts and low morale over the past few years, the local assemblies have been struggling to thrive and, in some cases, even survive.

Objective

Our objective was to take a comprehensive look at the operations of our local assemblies and identify areas that may cause difficulties. This report will detail some struggles that our local assemblies have faced and outline best practices and guidelines to which our members can look in order to help strengthen their assembly.

Project Scope

The Local Operations CUCSA Workgroup Project started in September 2013 and concluded in June 2013. The scope of this project was to investigate, report our findings, and compile a list of best practices that the local assemblies can adopt. We quickly realized that there were several areas on which to focus our energy, but with guidance of CUCSA leadership and the rest of the board we narrowed the scope down to: Organization and Structure, Recruitment and Sustaining Staff Engagement, Messaging and Communication and Campus Connections and Relationships.

Methodology

We started with the Assembly Overview survey that was updated by the Internal Operations workgroup, identifying each location's principal issue and then added some categories of our own. We also utilized the results of the Marketing workgroup's communication survey. Then we communicated directly with current board members via e-mail and telephone to gather additional information about each local assembly. Our purpose in contacting each campus was to discover not just what they were struggling with, but what each campus was doing well.

Finally, the workgroup had brainstorming sessions on the phone and at the quarterly CUCSA meetings to help develop the best practices.

ORGANIZATION AND STRUCTURE

Assembly Funding Stream

- Many Staff Assemblies report that they have insufficient funding to carry out their mission
- Assemblies need adequate funding to survive and be able to support staff
 - Talk to upper management to see if additional funding can be established
 - Fundraise via events and sponsorships
 - Partner with local businesses to give them access to staff
 - Community partnership fair
 - Bring outside organizations to events you already host
 - Payroll deductions in order to donate to staff assembly or scholarship awards

Assembly Information

- Nearly all Staff Assemblies use some Collaboration tools (i.e. wiki, SharePoint, box, etc.) and continuance of electronic records should be encouraged
- Assemblies should maintain and include templates on routine Staff Assembly activities, events, governance and communication roles to create consistent and recognizable branding and style for events that maintains from year to year
- If possible, a panel of engaged previous Staff Assembly Executive board members should be assembled for a discussion or sharing of institutional knowledge or pointers for incoming E-Board members

Knowledge Transfer

- Panel of previous members should be encouraged
- The creation of overlap executive board positions should be encouraged when the roles of sufficient complexity or commitment level, both to aid in a breaking in process for the chair-elect and then chair, or to also help absorb some of the work to fulfill the obligations and expectations of a roll. Two or three year transition stages (chair-elect to chair or chair-elect to chair to past chair) depending on the role.
- Organized file of previous documents and template examples of previous events/processes

Committees / Committee outreach

- Committee interaction cuts across all campuses, and usually focuses around areas of training and development, diversity and inclusion, search committees, campus community and climate, etc.

- Such work should be encouraged as a starting point to grow and maintain SA's (and staff in general) profile and value to the campus and senior administrators
- Potential outreach to include pointing to the benefits of inclusion of staff voices and knowledge in campus wide decisions by these committees
- Outreach from the Chancellor down to utilize examples of sister campuses' roles in committees across the system and the benefits seen at the home campus and at other campuses of utilizing the inherent skills of staff
- Bottom up approaches can include going directly to the staff that organize these various committees and approaching them with a message of increased efficacy of the committee's work with staff inclusion
- Position SA as an avenue to dedicated and talented staff, not just an avenue to the local E-Board. Stress the reach and impact of a SA call for representation to all staff on any committee when asked to show the resources and skills of staff that SA can marshal for the greater good of the campus

RECRUITMENT AND MAINTAINING STAFF INVOLVEMENT

Advertisement (ways assemblies can get the word out about joining and benefits of joining):

- **Events:** Staff Assembly volunteers could wear something (shirt, pin, apron, etc.) identifying themselves as being members of Staff Assembly. These volunteers can then engage staff enjoying the event about the benefits of joining Staff Assembly.
 - Conversely, if a non-Staff Assembly member volunteers for an event, they can be encouraged to join Staff Assembly
- **Newsletter:** Staff Assembly monthly newsletter (via e-mail) can advertise the value of Staff Assembly for staff members in addition to publicizing events, etc., thus both advancing recruitment of staff to Staff Assembly who see the value of what the group does and maintaining involvement of Staff Assembly members, especially those who may have become inactive for one reason or another.

Engagement (committees, development opportunities):

- **Committees:** Affording members of Staff Assembly the opportunity to participate in committees convened by leadership (either recruitment or issue-focused committees) can serve two purposes: Maintaining Staff Assembly member involvement by showing them the advantage of participating in these committees and providing evidence to leadership that Staff Assembly members can be valuable members of these types of committees, resulting in leadership inviting Staff Assembly to participate on a routine basis.
- **Development Opportunities:** Staff Assembly can provide both Staff Assembly members and staff the opportunity to develop their career and their life outside of work through one-time events (career fair, craft fair, etc.) or ongoing classes, etc. sponsored by Staff Assembly. For example, UCDMC Staff Assembly once sponsored an ESL class for staff that was very popular.

Recognition (awards, luncheons, acknowledgement)

- It is vital that Staff Assembly leaders recognize the efforts put forth by Staff Assembly members, but this must be done in a way that makes everyone feel good and no one feel left out. Hence, awards may not be the best choice.
- A yearly luncheon, particularly after a big event, rewarding Staff Assembly members for their hard work, rewards everyone for a job well-done.
- Breakfast or Lunch with the Chancellor events for Staff Assembly members will help members feel engaged in something important/bigger than themselves when afforded the opportunity to engage with leadership on issues important to staff.

Buy-In from Supervisors (release time, performance review, professional development):

- Release time is perhaps the most important aspect of supervisors' buy-in. If release time is difficult to obtain for events and/or meetings involvement in Staff Assembly will not grow beyond a core group.
- Involvement in Staff Assembly as a positive aspect of a performance review is probably not even on the radar of most supervisors, who are more concerned about on-the-job performance and may not have time to look beyond the very basics of the performance review process. Staff Assembly could help to turn that around through the advertisement and engagement processes above.
- Professional development of staff is considered by many supervisors to be unnecessary fluff that does not meet the business needs of the unit they are supervising. Staff Assembly could help to remedy that via the advertisement and engagement processes above.

MESSAGING AND COMMUNICATIONS

Develop a Communications Strategy

- Explain your Staff Assembly's goals with regards to communications. Indicate what your organization wishes to achieve on the communications front. For example, "This communications strategy shows how effective communications can:
 - help us achieve our overall organizational objectives
 - engage effectively with stakeholders
 - demonstrate the success of our work
 - ensure people understand what we do
 - change behavior and perceptions where necessary."
- Identify the audience of your communications.
- Describe the messages that will form your communications, including specific examples of text or graphics.
- Describe the forms that your messages will take and how they will be disseminated, including details about mailings, social media platforms, media destinations, etc.
- Provide specific details about your methods for spreading your message.
 - List any key campus contacts, campus groups, etc.

- Describe the resources or budget that you will use to support your communications strategy, including projections of future costs.
- Provide a timeline for the implementation of your communications strategy, using definite benchmarks as barometers of progress.
- Propose methods for evaluating the success of your communications strategy.
 - Include information about any surveys you hope to conduct, results you hope to see at certain dates, or responses you wish to receive from individuals. Ensure that there is a definite way to gauge whether your strategy has failed or succeeded.
- Identify ways in which your strategy can be adapted to changing conditions and how you will respond to feedback from within the organization.

Source <http://www.wikihow.com/Write-a-Communications-Strategy>

Identify the Best Communication/Collaboration Tool


There are a multitude of tools and social media sites on which Staff Assemblies can utilize to interact directly with current members and/or prospect members. Depending on the assembly's needs and target audience, some platforms are more appropriate than others.

- Listserv: Create a listserv to communicate via email.
- Box: Create public and/or private groups to collaborate on files.
- Wiki: Create a wiki page to collaborate within public or private groups on files or through threaded conversations regarding short term or long term initiatives.
- Chatter (Salesforce): Create a Chatter group to share documents, see posts and responses, collaborate, and get feedback/likes.
- Facebook: Create a business page where you share useful information about your assembly and brand, post marketing messages and respond to questions.
- Twitter: Share brief news and insights with links to your blog, website, Facebook page or other news sources.
- LinkedIn: Create a business profile and join conversations with related organizations.
- Instagram: Take a picture, enhance it with a filter, and then post it. You can also share from Instagram to Facebook, Twitter and more.
- YouTube: Share educational, promotional or inspirational videos.
- Blog: Create a page where you can share thoughts, insights and information that educate or support staff in your assembly.

Collaboration Tool Comparison

	Chatter	Listserv	Box	Wiki
Threaded conversations regarding short-term or on-going initiative	✓			✓
Project/Committee/Initiative communication	✓	✓		✓
Private and Public Groups	✓		✓	✓
File collaboration	✓		✓	✓
File Folder Organization			✓	
Document versioning	✓		✓	✓
Polls	✓			
Collaborative web document editing				✓
Collaboration with other UC campuses	✓	✓	✓	✓
Chat	✓			
Private communications	✓			

Chatter Screenshot



Med Ed Learning and Development (Private) — Heather Nichols Beck

Join UC President Janet Napolitano and staff employees from across the UC system for a one-hour online conversation about topics of interest, including campus climate survey results, compensation and benefits and investments in technology and infrastructure.

[Save the date: President Napolitano webchat with staff set for April 16](http://link.ucop.edu/2014/03/24/save-the-date-president-napolitano-webchat-with-staff-set-for-april...)
<http://link.ucop.edu/2014/03/24/save-the-date-president-napolitano-webchat-with-staff-set-for-april...>

Topics: UC System

Comment · Like · March 31, 2014 at 11:15 AM


Heather Nichols Beck

You can now sign up for the webchat/Google Hangout at <https://plus.google.com/events/c4saqghab1bsjc2beoc7gae540c>

Like · April 1, 2014 at 7:56 AM

CAMPUS CONNECTIONS AND RELATIONSHIPS

Relationships with Administration (Chancellor, HR/CHRO, EVC, VCs and other upper management) as well as, Faculty, Students, and other Campus Affinity Groups

- We found that most campuses have an existing relationships with senior administration in most of the identified areas. Interestingly, many of the campuses that have good relationships with their Chancellor, CHRO, or affinity groups are not certain how those relationships were founded or cultivated. Many of these relationships seem to have evolved into a symbiotic pattern or habit that continues to benefit everyone. Relationships also seem to be stronger with administrators who are the Staff Assembly sponsors.
- It is important to foster relationships with new executives /new leadership as soon as possible to orient them to the benefits of creating a collaborative affiliation with the Staff Assembly. Be sure they begin their position with a strong understanding of who Staff Assembly is and how Staff Assembly can work with them for the benefit of staff and the campus.

Strategies Used to Maintain Successful Relationships with Administrators and Affinity Groups

- We found that there are markers that indicate success in creating connections and maintaining and growing relationships. These indicators seem to point in the direction of **diplomacy**.
- Diplomacy is the employment of tact to gain strategic advantage or to find mutually acceptable solutions to a common challenge, one set of tools being the phrasing of statements in a non-confrontational or polite manner.
- Staff Assembly leadership who are skilled at engaging in strategic diplomatic behavior seem to be able to create, maintain, and strengthen critical relationships. This is particularly true if the relationship was previously strained.

Campuses who have successfully built relationships have engaged several of the following strategies:

- Schedule regular meetings with administrators and provide an agenda. Devise a system to ensure that not too much time passes before you connect with your contacts. Set aside time monthly or quarterly to discuss topics relevant to the Staff Assembly's goals, take notes and make an agenda for each person to talk about their role in the process. Follow-up in writing with any agreed upon action items.
- Working with others can have benefits and struggles, so **keep communication open** to ensure that the relationship stays strong. If the Staff Assembly does not already have a scheduled, cyclical meeting with an individual or an entity on campus, ask to begin one.
- **Invite them to speak at your meetings.** Bringing administrators or other affinity groups to Staff Assembly meetings will help to develop the relationship and solidify ways that Staff Assembly

can help with staff issues and initiatives. UC Santa Cruz has found it useful to have the CHRO attend their monthly meetings to give HR updates.

- **Generate Third party interactions and co-sponsorship opportunities** as tools for bridge building and partnership. This works particularly well in fostering relationships with other affinity groups. For example, ask the affinity group to participate in the Engagement survey workgroup as they might have as much of a vested interest as Staff Assembly in the survey results. Also, ask affinity groups to participate in the planning and execution of social events for staff. An example of this is Berkeley's partnership with the Cal Alumni Association to promote the family and adult camp. Another example is UCSB's partnership with the Chancellor's Staff Advisor Council to sponsor Staff Socials in the Winter and Spring.
- Find **common issues** to work with faculty and co-sponsor town halls with the Academic Senate to foster that relationship. The health care town hall held in the fall/winter 2013 was co-sponsored with Academic Senate at several UC campuses. UC Davis meets with the Academic Senate every other month.

Staff Assembly can also co-sponsor events with leadership. Examples may include:

- Leader to Leader Initiative
- Chairs Chats
- Publicizing Quality Initiatives and Recognizing Team Efforts
- To continue fostering relationships with affinity groups, **create consultant positions** or ex-officio positions on the Staff Assembly Board for affinity group leaders and other members of campus leadership. Develop functions for these project advisors to address around topics that are central to your Staff Assembly's mission statement. These consultant positions should be inclusive of multiple perspectives and should reflect the critical importance of having a mistake-tolerant environment where the goal is to provide greater opportunities, information, and transparency to staff.
- When your campus hosts CUCSA meetings, invite administrators and leadership from affinity groups to sit in on parts of the meetings or to attend the reception. This will introduce them to the system-wide efforts in which Staff Assembly participates.

Conclusion

The effectiveness of each local Staff Assembly is of vital importance to CUCSA and to the University, in how they represent the staff on their campus, in how engage with and communicate with staff, and in how they foster relationships with campus leadership. This workgroup report outlines several key points in achieving effectiveness.

Organization and Structure

- **Funding:** Although the local assemblies need adequate funding in order to function and to support staff, many report that they have insufficient funds to carry out their mission. If you engage in fundraising activities for staff assembly, this adds to your credibility when asking for funds from campus leadership.
- **Knowledge Transfer:** Overlapping of executive board positions should be encouraged, both to aid in training for the new role and in handling the workload of the position. It is also helpful to have an organized file of documents and templates for events and processes.

Recruitment and Staff Involvement

- **Events:** Sponsoring and staging events for staff has long been a successful tactic for local staff assemblies to get the word out about how the group benefits staff and to recruit new members.
- **Engagement:** Participation in committees, both those convened by campus leadership and those within the local staff assembly itself, keeps staff assembly members involved with the group and also serves to develop leadership qualities of staff assembly members.

Messaging and Communication

- **Communication Strategy:** Who is your audience? What form will your messaging take? How will you spread your message? What resources do you have for messaging? These are all questions to ask and answer in forming a communications strategy.
- **Communication Tools:** Choose among the multitude of communication tools and social media sites to interact directly both with current staff assembly members and prospective members. Depending on the target audience, some platforms are more appropriate than others.

Connections and Relationships

- **Relationships with Administration:** It is important to both build on the relationships already established between campus leadership and staff assembly and to foster new relationships with campus leaders. Staff assembly leaders who are skilled in diplomacy are able to create, maintain, and strengthen critical relationships.
- **Relationships with Affinity Groups:** Invite members of other campus groups to your staff assembly meeting, either to speak on a topic of common interest or even to join the group. Perhaps you can co-sponsor an event together or find common issues to engage in with campus leadership.