

**COUNCIL OF  
UNIVERSITY OF CALIFORNIA  
STAFF ASSEMBLIES**

**Policy and Procedures Committee**

**2009-2010 Annual Report**

**Committee Members:**

Andrea Wiley, UC Irvine (Chair)  
Jasu Prasad, UC Davis (Co-Chair)  
Peter Blando, UC Davis  
Connie Croker, UC Santa Cruz  
Gary Lowe, UC Merced  
Julie Luera, UC Santa Barbara

## **EXECUTIVE SUMMARY:**

The Policies and Procedures Workgroup (P&P) was charged with the record keeping, accounting and administrative duties for the Council of UC Staff Assemblies (CUCSA). Those duties include reviewing and updating the CUCSA History/Timeline Records, By-Laws, and Frequently Asked Questions page of the website.

In addition to the record keeping, we were asked to establish a policy for conducting surveys system-wide and within the delegation. A survey was created to collect procedural policies of the local Staff Assemblies, and was used as a test of procedures.

With Advocacy as the topic of the year, our group was asked to work with the Staff Advisors to the Regents to develop an Advocacy policy regarding proper policy efforts that can be used by all and made available on the CUCSA website.

As our standard call we continued maintenance of the budgetary procedures and the on-line archive of CUCSA material. This included the development of a proposed 2010-2011 budget request, as well as the gathering of Junior and Senior CUCSA Delegate actual expenditures, for future use.

## **UPDATES TO EXISTING MATERIALS:**

**Frequently Asked Questions (FAQ) web page:** An email was sent to the delegation soliciting additional questions that will prove to be helpful in the transition and orientation of future delegates. The FAQ's page was updated on the CUCSA website.

**By-Laws Revision:** While a written guideline for the election process was established in 2008-2009 by this workgroup, the procedure for electing an Elections Chair was not established nor added to the By-laws. This was reviewed at the March meeting at UC Davis. It was determined that nominations would be heard at the third meeting of the year and a vote to take place immediately following the nomination. The By-laws were updated to reflect this policy change.

**History Timeline Summary:** Based on budgetary constraints and decisions made in 2008-2009, the December CUCSA meeting travel was suspended and a one-day videoconference took the place of the three-day format.

2009-2010 brought continued combined efforts between the Office of the President and CUCSA. This included the addition of regular meetings with UC President Yudof and our CUCSA Leadership. Our CUCSA Leadership was also asked to play a part on two system-wide committees: the Committee on the Future and Post-Employment Benefits Task Forces.

All of these events were recorded in the CUCSA History Timeline.

## **NEW INITIATIVES:**

**Staff Assemblies Survey:** Throughout the years we have discovered the many differences in the structure, funding, and initiatives of the local staff assemblies. It was determined that a survey of all the campuses was the best way to capture those differences. This data will be used for both CUCSA planning and budgeting, as well as for each campus to review and possibly expanding their current practices. The survey was completed in March and the findings distributed to the delegates via email in mid-March.

**Survey Policy and Procedure:** Surveys using the Zoomerang system are a new tool for CUCSA. A major survey was launched in the fall of 2009 by our Staff Morale Workgroup. Throughout the process of developing and launching the survey, many issues were identified. Our workgroup was asked to put together a policy and procedure document to aid any group in successfully conducting a survey on behalf of CUCSA. This document outlines the steps involved with creating the survey, the hierarchy of the Zoomerang system, utilizing the Analysis function of Zoomerang, and authorizations required for conducting a survey within CUCSA and at the local level. This policy and procedure document was added to the CUCSA By-laws and website.

**Advocacy Policy:** In the current economic climate advocacy has taken a big role on and off each UC campus. Understandably, CUCSA should largely contribute to this movement. Using documents produced by the Staff Advisors to the Regents, an advocacy policy was established to help delegates advise their local assemblies on proper advocacy efforts, such as whether staff can advocate during work time, etc.. This document was added to the By-laws and distributed to the delegates to take back to their local assemblies.

## **STANDARD ANNUAL MAINTENANCE:**

**Budget Creation:** Using actual costs from CUCSA Senior and Junior Delegate travel, a budget for the 2010-2011 academic year was proposed and submitted to the CUCSA Leadership. This budget was presented to the UC President for his approval.

**Travel Expense Analysis:** The P&P Workgroup continues to gather and analyze the actual costs of delegate travel from year to year. These numbers are recorded and used for budget proposals submitted to the UC President.

**On-line Archiving Project:** The archiving of CUCSA documents is an on-going project. Due to budget constraints and shortage of staff, the on-line scanning of past documents has come to a halt. It was determined the documents would be gathered next year from the Irvine campus and quotes would be obtained from outside archiving companies to complete the project.

## **CONCLUSION:**

The Policy and Procedure Workgroup is a standing Workgroup for CUCSA. It is essential to the continuity of the delegation and maintaining standards to our practices.