



2015-16
Internal Operations
Workgroup Report
with Notes from the Electronic Data Officer

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2015 – 2016 Internal Operations (IO) Initiatives

- CUCSA Outreach and Marketing
- Bylaws
- CHRO Engagement
- Systemwide Committee Selections
- Diversity and Local Assemblies
- EDO Progress and Internal Opportunities
- Best Practices

CUCSA Outreach and Marketing

The IO team is clear that CUCSA can be a more effective organization and advocate for staff, if there is greater awareness of who we are and what we do. While many campus assemblies have been doing great work to grow their reputations and visibility through outreach and engagement, CUCSA is challenged in this role because of our smaller delegation size and the mobility of meetings. While CUCSA interacts with much of campus leadership in a meaningful way at quarterly meetings, there is little opportunity to do outreach to staff at large.

For this reason the IO team determined that the campus delegates could benefit from resources that would help them spread the CUCSA name and good work at their locations. To this end “CUCSA” branded sticky notes were created and distributed to all of the delegates for further distribution and use at the campus level. Post-it notes were determined to be the most pervasive and cost effective marketing tool at this time.

The continued enhancement and development of the CUCSA website and social media is another key opportunity for CUCSA to do outreach. The IO team has been working closely with the CUCSA Electronic Data Officer, or “EDO” to provide recommendations for digital media promotion and best practices. There are more notes on this in the EDO section.

CUCSA delegates need to keep talking about CUCSA at their local campuses. This interaction should include campus constituents, organizations and campus Chief Human Resource Officers (CHROs). Delegates are encouraged to celebrate their CUCSA membership through email signatures and messaging that encourages staff engagement. Local staff assembly web pages should include a section about CUCSA and web link to the CUCSA web site. Delegates are encouraged to invite constituents to CUCSA meeting debriefs where delegates can share the newest feedback from recent CUCSA meetings. There is more on CHRO engagement in the Know Your CHRO section of this report.

CUCSA delegates should be providing detailed quarterly meeting debriefs to their local assemblies. This is an opportunity to share information and gather reactions and feedback to changing staff policies. CUCSA delegates may also consider providing written recaps of quarterly meeting information in the form of white papers or newsletters.

Bylaws

The CUCSA bylaws were reviewed for accuracy and alignment with current CUCSA practices. In particular there were questions in regard to the language that speaks to the distribution of quarterly meeting information. A thorough review of the bylaws found no conflicts between the bylaws and current CUCSA practice. While the bylaws do state in article 1, section vii, that the CUCSA chair is responsible for setting the quarterly meeting agendas, it is logical that the CUCSA Secretary may be responsible for the actual distribution of said materials to the delegation.

The bylaws will likely need review and amendment in the 2016 – 2017 year as representatives from the UC Division of Agriculture and Natural Resources are added to the CUCSA delegation.

Chief Human Resource Officer (CHRO) Engagement

The Internal Operations team took time to solicit campus feedback and consider best practices for CUCSA engagement with the respective campus Chief Human Resource Officers.

The IO team believes that CUCSA could have a more effective and cooperative relationship with campus CHROs if delegates employ the following suggestions.

- Delegates should provide meeting summaries to their respective campus CHROs following each quarterly CUCSA meeting. Delegates should also be providing the completed CUCSA chair reports with executive summaries to their respective campus CHROs at the end of each CUCSA annual session.
- Delegates and local assembly members should be actively looking for community and campus event opportunities in which to partner. Local assemblies should be inviting and including their CHRO at every monthly / regular assembly meeting. Assemblies should also be encouraging partnerships and communicating with CHROs when coordinating campus forums.
- CUCSA delegates and staff could benefit by working with their local assemblies to engage the campus CHROs in relation to the CUCSA Engagement Survey results and the action items each campus has developed in response to the survey results. We have started to see progress in this direction since the second survey was completed. Working with the CHROs is one of the best opportunities for the delegates and assemblies to implement changes based on the survey results.

System wide Committee Selection Process

Background

The University of California is well known for its exceptional research, education and public service. Its reputation of excellence attracts the best faculty, students and staff from all around the world. While many factors have contributed to UC's rise to being the best public university system in the world, one of the least known and most influential ingredients to its success has been UC's tradition of inclusion of all community members in decision-making processes. Beginning with the regular consultation of faculty and later students and staff, the university has continuously evolved to be more collaborative. The inclusion of its constituencies has helped the university successfully navigate challenges.

Many of UC's most significant systemwide policy reforms have been lead by committees or task forces consisting of representatives from all of UC's constituents. Since staff members are often the ones to implement and administer university policies, it is a recommended best practice for UC leadership to include staff representatives in any policy reform discussions. Furthermore, the inclusion of staff in those conversations would improve communication between leadership and front-line staff. Too often, the lack of communication between and across the range and levels of staff on major decisions can lead to unnecessary misunderstandings, apprehension, and mistrust.

To ensure staff participation on all future systemwide committees, CUCSA has developed a staff appointment process. This process was developed under the following guiding principles:

- Easy To Understand and Communicate
- Flexible
- Fast and Efficient
- Respects the Autonomy of the Local Staff Assemblies
- Ensures Effective Staff Feedback

Staff Nominee Selection Process

In most cases when a systemwide committee or task force is chartered, the UC President or Regents move quickly in the nomination and selection of representatives. Historically, either CUCSA leadership or the Staff Advisors to the Regents are contacted with a request to serve. While the appointment of a CUCSA Chair or Staff Advisor is acceptable in ensuring the inclusion of staff on a systemwide committee, it may be an additional time burden on the already busy schedule of a Chair or Staff Advisor, and it may not allow for the most ideal staff contribution to a committee. With such a diverse staff population, the selection process should allow for staff with technical expertise or in-depth personal experience to be given the opportunity to participate. To ensure that all staff has a chance to serve, CUCSA recommends the following process when a staff member is requested for a systemwide committee:

- **Step 1:** CUCSA Chair or Staff Advisor receive request to appoint or recommend a staff member to a committee.
 - CUCSA Chair or Staff Advisor will ask basic questions – i.e. expected duration of time commitment, area of expertise/ field of knowledge set; description of committee making request.
- **Step 2:** CUCSA Chair or Staff Advisor gathers details and sends out a notice to the local Staff Assemblies/ CUCSA delegation.
- **Step 3:** Local Staff Assemblies forward their staff nominations to CUCSA.
 - Each Campus will have the flexibility to determine its own process.
- **Step 4:** CUCSA Leadership – Chair, Chair-Elect, and Secretary – will review and submit the nomination(s). If a final selection decision is the responsibility of CUCSA, then the leadership team will make a final determination.

Estimated Time of Entire Process – 2 to 3 weeks depending on how much time the campuses need to respond.



Recommendations for Local Staff Assemblies

Locations should send systemwide committee nominees that demonstrate the following attributes:

- Possess a broad knowledge and understanding of the University of California system.
- Understand concerns and issues faced by staff.
- Ability to consider and speak to issues from various perspectives.
- Commitment to attend and participate in weekly/bi-weekly/or monthly meetings Note: Systemwide committees vary in the frequency and location of their meetings. Most committee meetings are held at the UCOP offices in Oakland, CA, although many committees meet via conference calls. Travel is covered by the UC Office of the President for staff who travels to UCOP offices.
- Be a non-represented employee of their UC location.
- Have full support from supervisor to participate in all system wide committee activities

Best Practices for the Selection of a Staff Nominee

A core principle of the systemwide committee selection process is the respect for campus autonomy. Each Staff Assembly and campus has different resources to go about recommending nominees. To assist each campus in the development of their own staff selection process, CUCSA recommends the following best practices:

- Draft an internal process for the selection of staff representatives to systemwide and campus-wide committees.
- Gather a list of staff assembly members who would be interested in a systemwide committee
- Reach out to staff in departments who directly work on policies relating to the systemwide committee
- Reach out to staff affinity groups that relate to the system wide group

Recommendations for Staff Interested in Serving on a Systemwide Committee

Systemwide committees deal with critical policy issues that affect every staff member in the UC system (e.g. administrative policy, retirement plan and health benefits). It is vital that staff have strong representatives on these committees. If a staff member is interested in serving on a systemwide committee now or in the future, they should be encouraged to contact their local staff assembly members to submit their name or to learn about the respective campus process.

Related Draft Website Language

The following is suggested language for the CUCSA or local Staff Assembly webpage in regards to becoming a system wide committee staff representative.

Become a Systemwide Committee Staff Representative

Systemwide committees deal with critical policy issues that affect every staff member in the UC system (e.g. administrative policies, retirement plan and health benefits). It is vital that staff have strong representatives on these committees to contribute the staff perspective and voice. To ensure that staff members have a seat at the table, CUCSA has developed the following process for the nomination and recommendation of staff delegates to the President or the Regents.



If you are a non-represented staff member interested in serving on a system wide committee now or in the future, please contact your local staff assembly members to learn more about your campus nomination process.

Campus Assemblies and Diversity

The Internal Operations committee was interested in considering diversity at the campus assembly executive board level. The IO team believes that it is important that assembly executive boards be reflective in representation of the composition of their staff constituency. To that end local assembly executive boards should recruit with diversity in mind. Some ways that may help to achieve this are as follows.

- Outreach to staff in affinity groups
- Collaboration with the Campus Diversity Office
- Partner with affinity groups in campus events
- Assure that executive board elections are open and widely publicized

Electronic Data Officer (EDO) & Internal Operations

The Internal Operations group proposed the creation of an Electronic Data Officer (EDO) position in 2013. The concept behind this new position is to compliment the CUCSA Secretary with the growing demand for digitally distributed information and outreach. The primary tasks were to keep the CUCSA website updated under direction of CUCSA leadership and to assist in the gathering of post meeting feedback.

The demands on the position have grown with the EDO taking on more responsibility. Examples of this are the addition of social media and serving as primary SharePoint¹ account support. In addition, it is recommended that starting in the 2016 – 2017 CUCSA cycle, the EDO will be included in the CUCSA pre-meeting planning sessions. This allows the EDO to have access to the information needed to update the website in a more timely manner.

CUCSA & Best Practice Sharing

Best practice sharing between the campus delegates is one of the most important byproducts of the CUCSA process. Traditionally, the sharing of best practices that may be unique from campus to campus has been somewhat antidotal in nature. These occasions have typically occurred over lunch breaks, after hours or during the campus update presentations.

The campus update presentation process at quarterly gatherings is usually where new ideas come to light. We believe that this process is critical to the success of CUCSA and the campus assemblies. An example of the benefits of this process would be the implementation of staff mentor programs that were modeled from one campus to another.

We would like to assure that the campus update process is preserved and enhanced. One step toward making the most of the process is remind delegates to study all of the written campus updates which are submitted to the CUCSA secretary and EDO for web publication prior to each CUCSA quarterly meeting. This practice would ensure the best use of the quarterly meeting campus update agenda time and could leave more time for questions and answers related to presented practices.

The IO team believes that official time set aside for best practice sharing at the June 2016 quarterly meeting was very successful. We recommend that this practice continue at each quarterly meeting. There could be a benefit in coordinating the process with the campus updates. In this way, the campuses could have some say in what expertise and success they would like to share.

¹ SharePoint is the centralized document sharing system used by the CUCSA workgroups for document storage and sharing.