

The background of the page features a large, light blue watermark of the University of California seal. The seal is circular and contains the text "UNIVERSITY OF CALIFORNIA" around the top edge. In the center, there is a shield with a book, a star, and a banner that reads "LET THERE BE LIGHT". Below the shield, the year "1868" is inscribed. The seal is surrounded by a dotted border.

Council of UC Staff Assemblies (CUCSA)

2007-2008 Annual Report

Kathy Mendonca, CUCSA Chair

June 30, 2008

Table of Contents

CUCSA Mission and Organization.....	3
CUCSA Strategic Plan	3
Critical Staff Issues.....	3
CUCSA Commitment to Diversity.....	4
CUCSA Workgroups	4
Current Reduced Fee Enrollment Policy Workgroup Report Summary	4
Communication Workgroup Report Summary	5
Retention Workgroup Report Summary	6
CUCSA Leadership Team 2008-2009	11
CUCSA Acknowledgements.....	11
Appendix A - CUCSA Strategic Plan	12

CUCSA Mission and Organization

In support of the mission of the University of California it is the purpose of the Council of UC Staff Assemblies (CUCSA) to maintain and enhance communication within and across the University Community on matters of interest to staff employees in accordance with California laws and Regental policy.

Staff employees of the University of California are CUCSA's constituency. The council is involved in matters of interest and concern to those who are not exclusively represented and may address matters not within the scope of representation for those exclusively represented.

CUCSA Strategic Plan

This year, CUCSA entered into a formal strategic planning process. The Council consulted with local staff assemblies on issues of concern and areas of opportunity being addressed at the locations. The information gathered was used by CUCSA in developing a strategic planning document aligned with those developed by the local staff assemblies. CUCSA's Strategic Plan allows the Council to look at issues with long range vision, while at the same time offering flexibility to respond to contemporary issues (Appendix A).

Critical Staff Issues

In our discussions with local staff assemblies throughout the University of California system, who subsequently turn reached out to their constituency, the following broad issues were identified as being of significant importance to staff systemwide:

- Adequate resources to meet productivity expectations
- Communications
 - Effective delivery
 - Consideration of staff in messaging
- Educational Access
 - Inconsistent implementation of the current Reduced Fee Enrollment Policy
 - Fee waiver proposal for employee dependents
- Morale
- Professional development and training
- Retention
- Wage equity— internal/market

CUCSA Commitment to Diversity

CUCSA remains steadfast in its commitment to diversity. The importance of diversity in creating an environment that fosters the work and campus climate needed to fulfill the mission of the University can not be overstated.

CUCSA maintains a permanent seat on the UC Staff Diversity Council (UCSDA) and continues to partner with and compliment the work of this group in addressing staff diversity issues. This year, our 2006-07 Diversity Workgroup Report was presented to the UCSDC and efforts between CUCSA's Retention Workgroup and the UCSDC's Recruitment & Retention Subcommittee were coordinated to ensure enhancement of, rather than duplication of, efforts.

CUCSA Workgroups

The commitment of CUCSA to address staff issues is demonstrated each year in the work done by the Council's workgroups. The main focus of each workgroup is to gather data, analyze, address, provide solutions and offer suggestions on several of the areas (identified above under Critical Staff Issues) as being of importance to staff.

In CUCSA year 2007-08 the Council focused on the following areas:

- UC's current reduced fee enrollment policy
- Electronic communications and messaging
- Employee retention

Below are summaries from the reports produced by this year's workgroups. Copies of the full reports will be available online at the CUCSA website

<http://www.ucop.edu/cucsa/>.

Current Reduced Fee Enrollment Policy Workgroup Report Summary

A high priority is to raise leadership awareness about the current reduced fee enrollment policy, and issues resulting from lack of clarity resulting in inconsistent implementation of this policy throughout the system.

The reduced fee enrollment program is an important component of UC's employment benefits portfolio, and has been a component of staff personnel policies for more than 50 years. The program provides a tremendous opportunity for employees to pursue a UC education that will enhance their careers at the university while directly contributing to building a well educated, competent, and loyal workforce. However, the program is currently administered different at each

campus. For many staff, attempting to utilize the reduced fee enrollment program, the obscurity of the process can become a source of frustration and dissatisfaction.

Lack of comprehensive systemwide guidelines leaves implementation decisions to each campus. Adapting to local culture, while often positive, in this case has led to misinterpretations of policy and inconsistencies in access to the program. Some of the problems can be easily resolved (example, variations in fee calculation methodology can be resolved by modifying existing policy language to provide clearer definitions of terms). Other issues are more complex and are not addressed in current or historic policy documents (examples, admission requirements and applicability to graduate study).

As UC competes in a tighter labor market for the best and brightest workforce, the reduced fee enrollment policy will be an important incentive if the variety of problems that today's staff encounter when attempting to use the program are resolved.

Next Steps: *CUCSA strongly suggests that university leaders initiate a thorough review and update of the current reduced fee enrollment policy to address many long-standing contradictions, and to ensure that this excellent program can be a cornerstone of future recruitment and retention efforts. We encourage leaders to create a team charged to:*

- *Continue the tradition of progressive Regental leadership that created this program in 1953;*
- *Evaluate and resolving issues raised in the CUCSA workgroup report "A Review of the Reduced Fee Enrollment Policy, Resolving Contradictions and Redefining the Program for the 21st Century";*
- *Create clear and comprehensive policies and guidelines specific to this program to ensure that the program's benefits are provided equitably to all eligible staff, academics and retirees;*
- *Articulate the vision and value of the program in the contemporary university setting;*
- *Advance the impact of this program by eliminating as many barriers as possible for those who wish to participate.*

Communication Workgroup Report Summary

CUCSA recognizes that effective communication will be particularly important as the University of California transitions to new leadership and continues efforts to improve administrative structure and processes. Working with Office of the President's Strategic Communications staff, the CUCSA Communication Workgroup studied how electronic communication messages are distributed from the Office of the President to staff at the ten University of California campuses and the Lawrence Berkeley National Laboratory. The workgroup also reviewed a sampling of electronic communications between campuses and within a single campus.

Data from the workgroup's observations indicate that electronic communication delivery from the Office of the President to the campus and lab locations is somewhat inconsistent and is impeded by the UC system's diverse, decentralized network.

To begin, employees without regular access to computers (including food service workers, groundskeepers, parking attendants, etc.) miss important messaging and communications, and those with limited English speaking and/or reading skills may not benefit at all from written communications. There are inconsistencies in the current location distribution system for messages sent from UCOP. These include not only who controls the gate keeping for the message distribution but also what authority these gate keepers have to determine what information is to be forwarded and to whom. In addition, the sheer volume of electronic messages contributes to information overload; whereby important messages often go unread as they become buried in the overflow. In addition, messages may be discarded, without even a cursory overview, if they are deemed by the recipient to be poorly developed (i.e. a message that is not concise or seems irrelevant).

Next Steps: *Electronic communication methods and practices within our complex university system is a broad topic and further information gathering is required. It is the workgroup's suggestion that CUCSA continue its work with Office of the President's Strategic Communications staff in development of a survey to gather responses on electronic communication from staff at all UC locations. Data gathered from this effort can be used to determine location trends, best practices and next steps for addressing the University's communication concerns.*

Retention Workgroup Report Summary

Vital to UC's long-term success and California's continued growth and prosperity is the ability to attract and retain quality staff and faculty. A generally accepted estimate is that the one-time cost for replacing an employee is approximately 50% of their salary. However, other data suggests that these costs may be even higher. Operational and financial efficiency can be enhanced by attracting and retaining the employees needed for future success.

An appropriate salary and benefits mix are effective tools for ensuring retention of a quality workforce. Areas identified by UC employees as important to their continued involvement with UC include:

- Compensation
- Expand the Current Reduced Fee Enrollment Policy to Include Dependent Fee Waiver
- Housing
- Professional Development/Succession Planning
- Work/Life Balance

Compensation

In November 2005, The Regents approved a goal to “obtain, prioritize and direct funds” to match the market on cash compensation over a ten year period. Unfortunately, budget constraints, increased health insurance costs and the need to reinstitute contributions into the retirement fund have restricted the funding available to meet this goal. Market salary rates continue to increase at approximately 3% per year, and while UC has been able to keep pace with these increases it has not made any progress in addressing the 10% market lag.

Next Steps: CUCSA urges The Regents not to lose sight of the objective to increase the competitiveness of UC staff and faculty cash compensation. CUCSA suggests exploring options for reducing the time period to address the 10% lag in staff salaries from 10 years to five years, allocating sufficient resources over that five year period to effect change.

Expand the Current Reduced Fee Enrollment Policy to Include Dependent Fee Waiver

Current data on reduced fee enrollment programs and tuition reimbursement programs at other colleges and universities indicates that UC’s educational benefits are not keeping pace with many of its comparison institutions. During recent years, other educational institutions have not only continued their programs but have gradually increased the educational benefits available to employees, including extending educational benefits to dependents of employees. UC’s reduced fee enrollment policy is in need of systemwide review, as discussed in a separate report prepared this year by CUCSA (A Review of the Reduced Fee Enrollment Policy). The CUCSA retention workgroup encourages further enhancements to the existing program, including expanding the program to include offering fee waivers for dependents of staff and faculty employees as a further tool in retaining the best workforce.

The current Reduced Fee Enrollment Policy continues to provide an important incentive for staff to choose to work at UC. The current UC program is in need of systemwide review (see UC’s Current Reduced Course-Fee Program Workgroup Report Summary”, page 4).

CUCSA recognizes the difficulties inherent in expanding the reduced fee enrollment policy to include fee waiver for dependents of staff and faculty employees, particularly during challenging fiscal times. However, the value of this program as a tool in the employee retention portfolio cannot be overstated.

Next Steps: CUCSA encourages exploring further enhancements to the existing reduced fee enrollment policy, including offering fee waivers for dependents of staff and faculty employees. CUCSA encourages the Administration to explore different options for making the expansion of this benefit to dependents a reality. These include: exploring the creation of pre-tax educational deductions; designing a

phased approach towards dependent inclusion – allowing full program costs to be realized over several years; using a payroll surcharge on all non-federally funded employees – to comply with restrictions on the use of federal funds for tuition benefits for family members of employees; or perhaps...treating the program as lost revenue rather than as a benefit.

Housing

Many UC staff employees find it difficult to secure affordable housing in California. According to the California Association of Realtors (CAR) report, the median price of existing, single-family detached homes was \$488,640 in November 2007. Additionally, CAR reports that statewide, five of the 10 cities and communities with the highest median home prices (ranging from 800 K – 1.4 million) are located near UC campuses.

With the median income of UC career staff being \$48,124 (UCOP Compensation Unit 5/16/2008) it would be nearly impossible for the average UC employee to afford such housing. This leaves UC staff with very few choices. Some commute from long distances in order to find affordable housing, but this option may soon not be viable due to increasing fuel prices. Anecdotal reports indicate that many younger, and even some long-term employees, are leaving UC, and the state, because housing costs coupled with below market salaries makes it prohibitive to live in California.

Next Steps: CUCSA encourages locations to consider and consult with UC staff when planning new University housing projects (for rent or for sale). An additional suggestion is to explore options to expand the MOP loan program to provide low cost mortgages to qualified staff as well as faculty.

Professional Development/Succession Planning

Professional development and succession planning require a leadership commitment to identifying, training, and mentoring the high-potential, next generation of workers at virtually every level.

Various dynamic training programs have been developed and are offered throughout the UC system; however, many are so limited in scope as to make their impact on the University minimal. In addition, not all of these programs have sufficient follow-through built in to ensure success and value. Successful completion of programs by an employee should be merely the beginning of a goal-directed plan for putting new learning to use. To ensure long term impact, follow-up must be documented at defined intervals, assessing progress toward established goals.

Next Steps: CUCSA suggests that an aggressive systemwide program and plan be put in place to provide access to and encourage training and career development for staff members at all levels of employment and stages of their careers. Opportunities for staff development must be broadened in scope, serving a much

larger proportion of staff, and measurements and accountability for success must be established and implemented. Follow-up career guidance is also highly encouraged to optimize the value of UC's investment in its employees.

Work/Life Balance

In a time of budget cuts and scaling back of monetary rewards in the workplace, improvements in work/life balance provide an opportunity for UC to offer benefits to employees at little or no cost. Enhancing non-monetary benefits available to staff shows goodwill and encourages and maintains positive morale. Improved morale can lead to greater retention of a quality workforce thereby increasing operational and financial efficiency.

There are many creative ways that UC can enhance non-monetary benefits such as: free use of gym/wellness center facilities, reduced rates in dining halls, and publication of discounts available to employees from various UC vendors. Additional areas include: child care, flexible work schedules and telecommuting.

- **Child Care**

Variances occur across UC locations in child care availability, cost, and staff assistance programs. With differences in population size among our campuses and organizations, not all UC locations could or should provide the same child care options. Currently; however, high costs and long waiting lists prohibit most employees from accessing this benefit even when available.

***Next Steps:** CUCSA encourages the University to explore negotiating agreements with local private day care services to provide a reasonable level of availability, both on and off site, at rates that would be affordable for staff at all salary levels. A win-win opportunity can be created by showing local day care facilities that they will receive volume business from our employees over time, thereby increasing their profitability even at the lower tuition rate. Negotiating salary band tuition rates with UC on-site child care centers as well as providing transportation between neighborhood schools and the on-site center should be explored as well.*

- **Flextime and Alternative Work Schedules**

A climate of acceptance and support for flextime/alternate work schedules seems to occur most often with the adoption of standardized programs. The advantages of flexible alternative work schedules include: increased productivity, lower use of sick leave, improved employee morale, expanded service hours, reduced traffic and parking pressures, and improved recruitment and retention.

Currently only half of UC locations publish a policy regarding flextime and/or alternate work scheduling.

Next Steps: For locations not already allowing flextime and alternative work schedules, CUCSA suggests the implementation of pilot programs modeled after successful strategies used by UCD, UCSD and UCSB. Providing formalized policies and procedures and the creation of an Employee Relations Specialist position to assist staff and management in this area will also greatly contribute to the success of this type of scheduling.

- **Telecommuting**

Advantages related to providing telecommuting as an option for staff scheduling include: ability to better balance work and personal responsibilities, reduced absences and tardiness, improved morale, commitment and productivity resulting from support for personal work style preferences, potential to maximize office space options, improved transportation and parking options, uninterrupted time for creative, repetitive or highly detailed work, expanded use of equipment, increased cross training, enhanced retention, and enhanced recruitment.

All but one UC location has formal policies and procedures regarding telecommuting but the language and tone of these policies vary. Some present the telecommuting option as an excellent benefit for hard working, dependable employees to help with work/life balance, while others use language focused on the dangers of letting staff work from home.

As employees continue to face longer commute times and gas prices continue to rise telecommuting policies could be used to alleviate some of the time and financial costs. In addition, enhancing telecommuting policies and practices could help the University achieve its environmental goals.

Next Steps: CUCSA suggests that the verbiage of telecommuting policies be reviewed and revised to reflect a tone of appreciation and trust in staff, while still protecting the University's interests in safety, security and productivity. The successful telecommuting programs in place at UCD, UCSB, and UCSD could also be reviewed for best practices. In addition, the creation of an Employee Relations Specialist position to assist staff and management in this area will greatly contribute to the success of this type of scheduling. This specialist can be the same person discussed in the flextime/alternate work schedule section above.

CUCSA Leadership Team 2008-2009

As of July 1, 2008, the CUCSA leadership team will be:

Chair Joel Gonzales (UCSF)
gonzalesj@pharmacy.ucsf.edu
(415) 502-5368

Chair-Elect Lin King (UCD)
ltkings@ucdavis.edu
(530) 752-6970

Secretary Nancy Horton (UCB)
njhorton@berkeley.edu
(510) 643-9351

CUCSA Acknowledgements

CUCSA would like to thank the Office of the President, in particular Executive Vice President Katherine Lapp and Associate Vice President Judy Boyette for their leadership and unwavering commitment to CUCSA during this past year.

The Council would also like to thank Associate Chancellor Linda Williams for her mentorship of CUCSA's leadership team and her continued support and dedication to the concerns of staff.

Finally, CUCSA would like to recognize the Chancellors and Lab Director for the support CUCSA delegates receive from their supervisors and local campus administration in fulfilling their duties and obligations to the Council. The Chancellors commitment and support of not only CUCSA, but their local staff assemblies, is an indication of their unwavering advocacy and support of UC Staff.

Appendix A - CUCSA Strategic Plan

University of California
Council of University of California Staff
Assemblies
Strategic Plan

Review Annually – Last Reviewed March 2008

2007-08 delegates

Officers

Kathy Mendonca, UCOP - Chair
Joel W. Gonzales, UCSF - Chair Elect
Shelley Brown, UCLA - Secretary

Delegation

UC Berkeley

Nancy Horton, Senior Delegate
Beverly Skinner, Junior Delegate

UC Davis

Lin King, Senior Delegate
Deborah Ellis, Junior Delegate

UC Irvine

Penny White, Senior Delegate
Ramona Agrela, Junior Delegate

Lawrence Berkeley National Lab

Jeffrey Troutman, Senior Delegate
Angela White, Junior Delegate

UC Los Angeles

Sabrina Lux, Senior Delegate
Kyrie Bass, Junior Delegate

UC Merced

Robert Buel, Senior Delegate
Brian Gresham, Junior Delegate

UC Office of the President

Howard Fallon, Senior Delegate
Jennifer Damico, Junior Delegate

UC Riverside

Adrienne Sims, Senior Delegate
Joseph "JC" Allen, Junior Delegate

UC San Diego

Anna Gandolfi, Senior Delegate
Richard Laclair-Zoehrer, Junior Delegate

UC San Francisco

Heather A. Nichols, Senior Delegate
Clair Dunne, Junior Delegate

UC Santa Barbara

Valerie de Veyra, Senior Delegate
Kim Summerfield, Junior Delegate

UC Santa Cruz

Marco Garcia, Senior Delegate
Ricki Carr, Junior Delegate

CUCSA MISSION AND ORGANIZATION

In support of the mission of the University of California it is the purpose of the Council of UC Staff Assemblies (CUCSA) to maintain and enhance communication within and across the University Community on matters of interest to staff employees in accordance with California laws and Regental policy.

Staff employees of the University of California are our constituency. CUCSA is involved in matters of interest and concern to those who are not exclusively represented and may address matters not within the scope of representation for those exclusively represented.

CUCSA CHARGE

It is the responsibility of CUCSA to:

- Advocate for staff issues with the UC Regents and UC administration.
- Conduct research and offer **suggestions** to Administration on areas of importance to staff.
- Provide a staff perspective on particular issues when asked by the Regents or UC administration (such as staff input to the presidential search).
- Expose delegates to system-wide perspectives – enabling past delegates to become lifelong advocates for the University due to the perspective they gain from service on the council.
- Improve communication between all locations and among all levels within the UC-system.
- Train leaders.
- Provide leadership and advice to local staff assemblies.

CRITICAL STAFF ISSUES

Upon reaching out to the local assemblies throughout the University of California system, CUCSA has identified the following broad issues as being of significant importance to staff: (listed alphabetically)

- Adequate resources to meet productivity expectations
- Consideration of staff in communication messages
- Effective delivery of communication
- Fee waiver proposal for employee dependents
- Morale
- Professional development
- Reduced fee enrollment policy inconsistent implementation
- Retention
- Wage equity— internal/market

GOALS, STRATEGIES, AND TACTICS

In consideration of these critical issues, our Strategic Plan is designed to allow CUCSA to fulfill its roles as both communicator and advocate for staff concerns with the intention of being value-added in retaining and developing talented staff throughout UC.

Goal 1: Ensure two way communications between University Executive Leadership and Staff.

Foster respect, communication, and collaboration among staff and other members of the university community.

Strategy: Provide a forum where University staff may discuss university related issues of mutual interest.

Tactic 1.1: Delegates and the CUCSA Steering Committee meet quarterly for up to 2 ½ days to share organizational best practices, communicate issues and develop leadership skills.

- Tactic 1.2:** Delegates and the CUCSA Steering Committee serve as instruments of communication for staff to bring forward concerns to CUCSA and University Leadership and receive responses through the same channels.
- Tactic 1.3:** Delegates and the CUCSA Steering Committee respond to University communications as needed to address issues of concern for staff.

Goal 2: Serve as a source for information and staff perspective to the UC administration and others on policies, processes, or other matters of mutual interest.

Strategy: Provide reports with relevant data, analyses, and suggestions.

- Tactic 2.1:** CUCSA Workgroups
Tactic 2.2: Ad Hoc Committees
Tactic 2.3: Serve on the Systemwide Staff Diversity Council standing committee
Tactic 2.4: Archival Mechanisms

Goal 3: Ensure continued support of CUCSA

Strategy: Ensure value of CUCSA is visible throughout the University of California

- Tactic 3.1:** CUCSA executive leadership meets regularly with UCOP executive staff and leadership of the Academic Senate
Tactic 3.2: CUCSA executive leadership meets regularly with Staff Advisor to the Regents
Tactic 3.3: Provide reports to Administration on relevant issues
Tactic 3.4: Ensure Regents attend CUCSA Quarterly meetings
Tactic 3.5: Align with our local UC staff assemblies

WORKGROUPS

The majority of the work done by CUCSA is accomplished through its workgroups. The main focus of the workgroups is to gather data, analyze, address, and provide solutions to the issues identified above as being of the greatest importance to staff. Additional workgroups may be formed around a topic or issue also relevant to the CUCSA mission and charge. Every delegate is appointed to a workgroup for a one year term by the Chair in consultation with the Chair Elect and Secretary. The product of the workgroup is a meaningful year-end report that moves forward to UC Administration and The Regents.

WORKGROUP PRIORITIES

CUCSA has identified the following priorities to be topics for workgroups for the next three to five years:

- 1) To address issues of broad importance to staff annually—in addition to a standing committee to review and address CUCSA – related policies and procedure, each year workgroups will embrace two or three of the issues identified in the “Our Critical Issues” section above.
- 2) To build on past accomplishments and successes – CUCSA should continue to be aware of and build upon the products of past workgroups. Past work group reports are available on the CUCSA [website](#) on the following topics:

- Diversity
- Faculty/staff partnership
- People management initiative
- Policies and procedures
- Principles of community
- Staff Advisor to the Regents
- Staff housing
- Staff mentoring
- Workforce evolution

AD HOC COMMITTEES

In addition to the analysis undertaken by the larger workgroups, CUCSA delegates are frequently asked to form ad hoc committees in order to address special one-time needs. For these special one-time needs, delegates are asked to volunteer for ad hoc committees. The ad hoc committees are assigned to work on a single issue or question. When the work is completed, the commitment to the committee is also completed. Ad hoc committees are not expected to run the entire year. The results produced by an ad hoc committee are presented to the CUCSA leadership and may be forwarded to the UC administration and the Regents, if appropriate.

Examples of past ad hoc committee work is as follows:

- Development of position papers
- Drafting and vetting of official CUCSA responses to University issues
- Presidential selection
- Review and update of documents
- Website maintenance

2007-2008 PRIORITIES

In consideration of the above priorities, the following workgroup and ad hoc committees have been established for CUCSA year 2007-08:

1) **Workgroups:**

- a) Current Reduced Fee Enrollment Policy – To highlight discrepancies in the program and suggest a careful review of the program, and creation of clearly written implementation guidelines to establish how staff can access this benefit.
- b) Communication - The project's primary focus is to improve the communication between University leadership (Regents, the President, etc.) and staff. This effort takes on two facets – 1) Mechanisms for communication and 2) Message content and its affect on staff, faculty, and student perceptions. Given the breadth of these two facets, the workgroup will focus on a gap analysis of the mechanics of communication and will transition into content evaluation and suggestions further along in the cycle of the work group.
- c) Retention—The workgroup will provide analysis on those areas which University of California staff members have identified as important to their continued involvement with UC. The purpose of the analysis is to assist the University of California in increasing operational efficiencies through the reduction of employee turnover.
- d) Policies and Procedures—The Policies and Procedures Committee (a standing committee of CUCSA) will update the working procedures for the election coordinator, clarify delegate expectations, update CUCSA's history for the website and CUCSA binder, update CUCSA's travel guidelines, revise the CUCSA meeting planning checklist, update the CUCSA Secretary's role, create

a profile of all UC Staff Assemblies, and create a frequently asked questions sheet for CUCSA delegates. The Policies and Procedures Committee will also create the 2008-09 CUCSA budget request and 2007-08 final CUCSA budget for the Office of the President.

2) Ad Hoc Committees:

- a) Strategic Plan—to establish a framework of focus and direction for CUCSA.
- b) Website Review—to review the current CUCSA website to determine if it supports CUCSA's mission by determining what content remains relevant, what's missing, and functionality of the site's layout.
- c) CUCSA Official Response Team—to draft and vet official CUCSA responses to University issues..