

**Council of University of California Staff Assemblies
(CUCSA)**

2009 – 2010 Annual Report



Lin King, CUCSA Chair

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CUCSA 2009 – 2010 Annual Report

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CUCSA: History & Mission

A Brief History of the Council of University of California Staff Assemblies

The original concept of the University of California Staff Assemblies (hereafter referred to as the Council) was, and remains, an assembly of staff dedicated to improving communications between University of California (UC) administrators and staff, and between staff at UC locations (Office of the President, Lawrence Berkeley National Laboratory, and all ten campuses). The Council's objective is to provide service to the University by advising and providing a staff perspective to decision makers.

The Council, originally referred to as the University of California Staff Employee Associations, was founded on November 26, 1974 and chartered on July 18, 1975, and was comprised of delegates from six campuses. The current name, "Council of University of California Staff Assemblies" (CUCSA), was adopted in 1981.

An abbreviated timeline of significant moments in CUCSA's history is as follows:

- 1977:** The Chair of the Council is appointed to serve on two critical system-wide committees dealing with staff benefits, cross-training and career ladders.
- 1978:** Chairs of each campus staff assembly, as well as members of the Council, were invited to Charter Day 1978 at UC Berkeley.
- 1978:** UC Office of the President agreed to pay travel expenses for one delegate from each campus to attend Council meetings. The Council name was revised to "University of California Staff Associations."
- 1982:** The CUCSA Chair was appointed to the President's Sexual Harassment Task Force and President Saxon committed to continue to utilize CUCSA members in system-wide committee assignments.
- 1992:** CUCSA began presenting its annual reports to the UC Board of Regents.
- 1993:** The CUCSA Chair and Vice Chair participated as the first staff invitees to an All University Long-Range Academic Planning Retreat. In addition they were invited to present issues of concern to the newly formed Academic Planning Council.

- 1999:** A Faculty/Staff Partnership Task Force was formed jointly by the Academic Council and CUCSA and co-chaired by the Chair of the Academic Council and the Chair of CUCSA.
- 2000:** CUCSA welcomed the first delegates from UC Merced.
- 2003:** CUCSA was invited to participate in the Staff Advisory Committee for the Selection of the UC President.
- 2004:** A standing Diversity Committee was formed by CUCSA in response to President Dynes' declaration that diversity was among his highest priorities for the university.
- 2005:** A watershed moment for all UC staff as The Board of Regents voted to approve a recommendation by President Dynes that staff is included at The Regents table as Staff Advisors to The Regents - an initiative that CUCSA had been deeply involved with for more than ten years.
- 2006:** The Board of Regents voted to have a Staff Advisor and a Staff Advisor Designate as permanent members at their table.
- 2007:** Members of CUCSA were called upon to serve on the Staff Advisory Committee to the Regents for the selection of the successor to President Dynes.
- 2009:** CUCSA Chair appointed to serve on President's Task Force on Post Employment Benefits.
- 2010:** CUCSA Leadership invited to meet quarterly with UC President Yudof; CUCSA Chair participated in UC Advocacy Day; CUCSA Chair-Elect appointed to the Commission on the Future of UC Funding Strategies Working Group; UCFW and CUCSA initiates work group to explore educational benefits for dependents; UCOP initiates review of educational benefits for employees and dependents.

The Mission of the Council of University of California Staff Assemblies

As articulated in the bylaws of the Council of University of California Staff Assemblies:

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.

The constituency of the Council is understood to be staff employees of the University of California. 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.

This mission is accomplished by:

- *Providing a forum where University staff may discuss university related issues of mutual interest.*
- *Providing information and staff perspective to the Administration and others on policies, processes, or other matters of mutual interest.*
- *Fostering respect, communication, and collaboration among staff and other members of the University community.*

The 2009–10 CUCSA delegation continued to fulfill and extend its mission. This document represents an overview of the work undertaken by CUCSA during the 2009–10 year in support of CUCSA’s mission.

CUCSA: Relationship to Other UC System-Wide Entities

Over the past thirty-five years CUCSA has increasingly been recognized as a primary voice for not only policy-represented staff, CUCSA's core constituency, but also for the interests of all UC staff. CUCSA has taken a leading role on a number of critical system-wide issues including: staff retention; dependent fee waivers; effective communication between senior leadership and UC staff; succession planning and workforce evolution; and workforce diversity. In each of these areas, CUCSA has sought to partner with existing system-wide entities in order to effectively collaborate to create implementable solutions that serve the interests of all parties. Some of the entities with which CUCSA has had effective partnerships include:

Staff Advisor to the Regents

The relationship and roles of CUCSA and the Staff Advisor to the Regents provides a significant benefit to UC staff. The Staff Advisor to the Regents initiative was championed for more than ten years by CUCSA. CUCSA and the local staff assemblies have often served as the training ground for the Staff Advisors to the Regents. In fact, the majority of Staff Advisors (David Bell, Dave Miller, Linda Brewer, Bill Johansen, Edward Abeyta, and Juliann Martinez) all previously served on CUCSA or their local staff assemblies.

While the role of Staff Advisor is the highest profile staff advocacy position within the UC system, in order for the Staff Advisors to be maximally effective, it is critical that they have a firm grasp on the system-wide employee perspective on any given issue. CUCSA serves as the vehicle for the broad-based staff feedback and consultation with its already established local assemblies at each campus.

Senior Leadership at Office of the President

In 2009–10, CUCSA's relationship with UCOP continues to strengthen and grow even with the continued organizational transitions at UCOP. CUCSA leadership was invited to meet with President Yudof on a quarterly basis. The relationship with UCOP Human Resources continued to develop through meetings with Dwaine Duckett, Vice-President Human Resources and CUCSA's new formal sponsor, Howard Pripas, Employee Relations Director.

This year CUCSA collected, summarized, and provided valuable feedback on a variety of issues and topics to UC's senior leadership:

- Salary Reduction/ Furlough Plan Options
- UC Accountability Framework
- Salary Reduction/ Furlough Guidelines
- Policies 65 and 67 (policies related to the termination of MSP career employees)

- UC Commission on the Future
- Non-represented staff reaction to UPTE bargaining agreement.
- Post-Employment Benefits Survey

The effective partnership between HR and CUCSA allows CUCSA delegates to be well-informed regarding not only the specific implementation of a given policy but the considerations behind the adoption of a particular policy. Such insight allows CUCSA delegates, as peer-elected leaders from their home locations, to more effectively work to involve and communicate to staff in ongoing initiatives between UCOP and UC staff.

Academic Senate

At the beginning of the year, CUCSA leadership initiated an introductory meeting with Chair Henry Powell and Vice Chair Daniel Simmons. Leadership shared top priorities for the upcoming year for faculty and staff, and agreed that three areas of interest to both faculty and staff are workforce development, diversity, and educational benefits. A work group was formed comprised of faculty members from University Committee on Faculty Welfare (UCFW), CUCSA Chair, and Staff Advisor Designate to the Regents Juliann Martinez to further explore the issue of educational benefits.

However, one of the highest priorities for the 2010-11 delegation will be to work together with the systemwide Academic Senate on issues that impact both staff and faculty. The coming year should provide no shortage of items on which to collaborate, including: faculty and staff welfare, institutional advocacy, and the status of UC Retirement System (UCRS).

Spotlight on Professional Development

For the first time in CUCSA's history, a formal individual professional development program was offered to CUCSA delegates, with 100% participation in the individual development program. Serving on the CUCSA delegation provides many opportunities to gain vital leadership skills that contribute not only to the effectiveness of the CUCSA organization but to the department the delegates serve on their home campuses. The professional development programs was created by conducting a thorough analysis of the responsibilities of a CUCSA delegate and, from the analysis, four meta-competency areas were identified with fifteen related skill dimensions. The four meta-competency areas are communication, problem-solving, performance management, and leadership/influence.

CUCSA delegates then created individual development plans (IDPs) that targeted at least two of the skill dimensions for development throughout the year. The IDPs were forwarded to the CUCSA Chair for monitoring and then delegate activities were evaluated at the end of the year to verify that the learning activities had been completed. A review of the completed IDP's revealed that delegates chose to develop skills from all four meta-competency areas with the majority coming from the areas of communication and leadership/influence. The specific skill areas

targeted by the majority of the delegates were oral communication and organizational awareness. Based on the success of this pilot program, and to demonstrate commitment to leadership development at all levels, CUCSA plans to make this program an ongoing activity.

CUCSA: Year in Review

Council Composition

This year's CUCSA delegation consisted of three executive officers (Chair Lin King, Chair-Elect Brian Gresham, and Secretary Sue Anderson), and two delegates from each of the ten campuses, the Office of the President and the Lawrence Berkeley National Laboratory. The twenty-seven members of this year's council collectively possessed more than three hundred years of service to the University of California, and represented a broad-diversity of functions within UC. The complete roster of CUCSA members is as follows:

Lin King

UC Davis (Chair)
Program Manager
R4 Recycling Program

Brian Gresham

UC Merced (Chair-Elect)
Assistant Director, Capital Planning &
Space Management

Sue Anderson

UC Riverside (Secretary)
Manager, Education and Development,
Human Resources

Paul Riofski

UC Berkeley
Manager, UC Berkeley Nanosciences and
Nanoengineering Institute

Steven Garber

UC Berkeley
Business Services Director, Office of the
Chancellor

Peter Blando

UC Davis
Business Services Manager, Office of the
Vice Provost

Jasu Prasad

UC Davis Medical Center
Food Services Supervisor II

Andrea Wiley

UC Irvine
Management Services Officer,
Developmental and Cell Biology

Jan Serrantino, Ed.D.

UC Irvine
Director, Disability Services Center

Stefano De Santis

Lawrence Berkeley National Laboratory
Staff Scientist, Accelerator and Fusion
Research Division

Maryann Villavert
Lawrence Berkeley National Laboratory
Business Manager, Earth Sciences
Division

Gerard Au
UC Los Angeles
Computer Support Coordinator,
Department of English

Erin Webb
UC Merced
Assistant Registrar, Office of the
Registrar

Andrea Gerstenberger, Sc.D.
UC Office of the President
Director, Health Sciences Planning and
Programs

Scott Silverman, Ed.D.
UC Riverside
Coordinator, Orientation Programs,
Student Life

Alonso Noble
UC San Diego
Assistant Superintendent, Facilities
Management/Landscape Services

Ashley Inman
UC San Francisco
Human Resources Analyst, Human
Resources

Maureen Wadleigh
UC Los Angeles
CAO, UCLA Recreation, Department of
Cultural & Recreational Affairs

Gary Lowe
UC Merced
Research Analyst, Institutional Planning
and Analysis

Ravinder Singh
UC Office of the President
Research Analyst, Institutional Research

Veronica Ruiz
UC Riverside
Management Services Officer,
Vice Chancellor Student Affairs

Chuck Morgan
UC San Diego
Assistant Director, Facilities Management
Department

Kathryn Jackson
UC San Francisco
Academic Personnel Analyst,
Obstetrics, Gynecology and Reproductive
Sciences

Stephanie G. Coghlan
UC Santa Barbara
Associate Administrator, Student Health
Services

Julie Luera,

UC Santa Barbara

Budget and Financial Analyst, College of
Engineering

Connie Crocker

UC Santa Cruz

Budget Analyst, McHenry Library

Claudia Parrish

UC Santa Cruz

Program Coordinator, STARS

Quarterly Meetings

The primary vehicle through which CUCSA works to accomplish its mission of enhancing communication between senior administration and staff are the quarterly meetings. Being physically present at the various campuses allows for a much greater sense of the unique characteristics and qualities of each location, and how they contribute to the specific set of best practices that each location presents at the formal meetings. However, recognizing the need curb travel expenses, CUCSA held its first meeting video conference in December. The 2009 – 2010 meetings took place at:

- UC Los Angeles (September 2009)
- Video Conference – Regional videoconference hubs at UC Riverside and UCOP (December 2009)
- UC Davis (March 2010)
- UC Santa Barbara (June 2010)

CUCSA's quarterly meetings continued to reveal CUCSA's increasing reputation as a valuable staff partner that brings a collaborative approach to addressing issues of importance to staff and for finding mechanisms whereby staff can continue to make tangible contributions to the mission of the University of California. CUCSA's role as a valued partner was demonstrated by the high-level of engagement the organization had with key members of the University of California, including face-to-face discussions with:

University of California Office of the President:

- Mark Yudof, *President*
- Henry "Harry" Powell, *Academic Senate Chair*
- Dwaine Duckett, *Vice President Human Resources*
- Peter Taylor, *Chief Financial Officer*
- Gary Schlimgen, *Director of Retirement Services*
- Patrick Lenz, *Vice President, Budget Office*

- Vincent W. Stewart, *Associate Director, Institutional Relations, UC State Governmental Relations*

The Board of Regents:

- Edward Abeyta, *Staff Advisor to The Regents*
- Juliann Martinez, *Staff Advisor Designate to The Regents*
- Jesse Bernal, *Student Regent*
- Jess Cheng, *Student Regent, Designate*
- Norman Pattiz, *Regent*

Chancellors:

- Gene D. Block, *Chancellor, UCLA*
- Henry T. Yang, *Chancellor, UC Santa Barbara*

In addition to the aforementioned leaders, CUCSA delegates had the opportunity to directly engage with the following additional guests:

UCLA:

- Dr. David Feinberg, *Chief Executive Officer & Associate Vice Chancellor – UCLA Medical Center*

UC Davis:

- Enrique Lavernia, *Provost and Executive Vice Chancellor*
- Karen Hull, *Associate Vice Chancellor, Human Resources*
- John Meyer, *Vice Chancellor, Administrative and Resource Management*
- Dr. Thomas Nesbitt, *Assistant Dean of Administration, School of Medicine*

UC Santa Barbara:

- Marc Fisher, *Associate Vice Chancellor*
- Cynthia Cronk, *Human Resources Director*

The ability to meet face-to-face with such a broad array of key leaders across the UC system has long been one of the core foundations of CUCSA's organizational success. The value of meeting in person, both in terms of the relationships that are formed and the ability to discuss sensitive matters cannot be understated, and CUCSA is eager to restore a full slate of meetings at the earliest possible date.

Committees & Work Groups

Strategic Communications Work Group

Communication continues to be a critical and important issue for the University of California and the Strategic Communications Workgroup sought to facilitate discussions related to the identification and evaluation of relevant news content relevant for UC employees. To this end, the workgroup issued the following ideas:

- All campus locations should have a clearly identified link, from their main web page, to the University of California's UC Newsroom.
- Each UC location should include a standardized (in terms of content, if not format) employee resources location containing links to: At Your Service; UC budget information; UC for California; centralized UC job postings; links to approved staff organizations; career development resources for each campus; UC Diversity and other relevant items of interest to employees.
- In order to enhance and reinforce the notion of a unified UC system, each location's main website should contain some similar UC branded elements that link to a central UC website.
- The possibility of combining the "Our University" and "Your University" newsletters should be studied, as much confusion exists regarding the distinctions between the two.

Staff Morale Workgroup

The Council of UC Staff Assemblies' Staff Morale Workgroup was formed, with a total of eight members from six UC campuses, the Lawrence Berkeley National Laboratory and the Office of the President, and sought to provide the Office of the President with no-cost or low-cost ideas that would positively impact staff morale systemwide.

These ideas stem from a survey undertaken by the Staff Morale Workgroup, distributed through local staff assemblies. While the participation rates and employee classification of staff respondents varied per location, with the result that the sample may not be statistically significant, the workgroup and CUCSA find the survey results to hold both practical significance and meaningful relevance for increasing staff morale at the University of California.

In summary, in order to have a significant and immediate impact on improving staff morale, the workgroup has identified three ideas (with a sample low cost idea following in italics) that would improve staff morale at the University of California.

- Improve Supervision; (*Provide mechanisms for bi-directional assessment*)
- Increase Professional/Career Development Opportunities; (*Provide a centralized location for all UC recruitment listings*)
- Increase Employee Recognition and Rewards; (*Provide formal employee incentive and recognition programs*)

In addition, the Staff Morale Workgroup suggests consideration of the following principles when ideas are implemented:

- Metrics for evaluation: It is important for any program implemented to include a clear way of measuring the efficacy of the program. Metrics must be in place to assure that implemented ideas actually do improve morale.
- Staff involvement: Staff has participated in making the recommended ideas presented in this report. However, continued participation in the decision-making process is recommended wherever possible. Empowering staff at all levels to have influence in the process will create support for our institutional mission and improve morale. Staff who feel valued in this process will be far more likely to understand and appreciate the reasoning for future decisions and actions taken by the University.
- Ongoing communication: Ongoing communication in the execution of any or all of the ideas presented in this report is vital, as staff will recognize that their voice is being heard.

The workgroup believes that through demonstrated commitment to address the concerns raised in the staff survey, the University of California can consistently improve staff morale and maintain it at the highest possible levels.

Policies and Procedures Workgroup

The Policies and Procedures Workgroup is a standing CUCSA committee, convened annually to examine CUCSA's policies with a focus on improving efficiency, increasing productivity, and enhancing internal communications.

An ongoing charge for the Policies and Procedures group is the analysis of regularly-recurring operational items including: the CUCSA operating budget; delegate travel expenditures; and the archival of previous and current CUCSA documents.

Additionally the group is responsible for updating CUCSA-related materials such as: the Staff Assembly Profiles; Frequently Asked Questions worksheet; Travel Guidelines; the CUCSA History Timeline; proposing recommendations for the by-laws, and updates to the working procedures document.

Internal Communications Workgroup

The CUCSA Internal Communications Work Group (ICWG) focused its energies and efforts in 2009-2010 on the following areas:

- Optimizing communication within CUCSA in the broadest sense, including not only the current CUCSA delegates and officers, but also alumni (past CUCSA participants), guests, campus constituents and friends;
- Maintaining and developing the CUCSA website, refining protocols and further developing working relationships with UCOP IT staff, updating content and standardizing formats, and creating a new “look and feel” for the site;
- Expanding CUCSA’s branding initiative by featuring the new logo in every place imaginable (e.g., on agendas and reports, in PowerPoint presentations, and on name tents and badges at CUCSA meetings) and reviewing and revising the CUCSA website to ensure consistent use of the CUCSA name and logo; and
- Exploring virtual meeting options to replace the three-day face-to-face CUCSA meeting in December of 2009 (agreed to by the previous year’s delegation in an effort to reduce costs in this year of severe cuts to UC’s budget), including a review of online conferencing options, interface with UCOP staff and meeting coordination support to CUCSA.

The ICWG also offered several recommendations to next year’s CUCSA leadership and delegation:

- Create a quarterly electronic newsletter as a vehicle for the CUCSA leadership to report to the delegates and their constituents on their activities at the systemwide level, and also initiate dialogue and solicit feedback on important issues;
- Include a CUCSA button on local campus/lab Staff Assembly websites so visitors can click on the CUCSA logo to go to the CUCSA website;
- Improve organizational communication strategies to include more opportunities for delegates to interact with each other and hear each other’s points of view, so that new and better ideas can emerge from the discussion, both in face-to-face and virtual meetings.

CUCSA: A View Toward the Future

As CUCSA moves into the 2010-2011 year, the following four areas have been identified as ongoing high-priority concerns:

- Policy-covered Staff Compensation & Benefits. CUCSA leadership has expressed its concerns to senior leadership at Office of the President that policy-covered staff compensation has not kept pace with peer groups either within or beyond the UC system. CUCSA believes it is imperative to retain UC's high-value staff and stands ready to support Office of the President in their efforts to ensure all staff are fairly compensated.
- Educational Benefits Equity for University Employees. CUCSA continues to raise the issue of benefits equity for UC employees, noting the massive gap between educational benefits offered to employees of the California State University System and those offered to employees of the UC system. As the cost of UC education continues to rise, addressing this inequity will be critical to ensuring UC continues to attract the best and brightest employees.
- Foster a Culture Committed to Talent Management. For more than a decade, UC has issued multiple white papers on the importance of talent management yet, to date, few substantial initiatives to seriously address talent management and succession planning at UC have been implemented. However, based on ongoing conversations with Dwaine Duckett (*Vice President, Human Resources*) and Randy Scott (*Executive Director, Talent Management and Staff Development*) CUCSA is encouraged that real progress might yet be made on this critical matter.
- Support Tolerance and Diversity Continued Collaboration to Sustain UC Excellence. CUCSA has long been a leader, and advocate, for tolerance and diversity across all levels of the University of California and remains a committed and dedicated partner, working toward improving campus climate for not only students, but for all UC employees as well.

While the challenges before UC are substantial, CUCSA remains optimistic that, through continued collaboration and commitment to excellence, the University of California will endure as a beacon of excellence in higher education and we look forward to addressing these, and other issue as they arise, in the years ahead.

2010 – 2011 Leadership Transition

At the final meeting of the 2009-10 delegation, held at UC Santa Barbara, annual elections were held in accordance with the CUCSA bylaws for the positions of Chair Elect and Secretary for the 2010-11 year.

The new CUCSA executive officers will be:

Chair: Brian Gresham, *UC Merced*

Chair-Elect: Ravinder Singh, *UCOP*

Secretary: Kathy Jackson, *UCSF*

To ensure a successful transition in leadership teams, the incoming and outgoing executive officers will be holding a one-day leadership retreat. The focus of this planning meeting will not only be internal knowledge transfer but also to create a framework for the 2010-11 delegation that will allow for an acceleration of the workgroup formation and work flow processes.

Acknowledgements

The accomplishments achieved this year by CUCSA would not have been possible without the support and work of others whose contributions made it possible.

CUCSA would like to appreciate and acknowledge the superb support provided by President Mark Yudof and Executive Vice President Nathan Brostrom. In order to better connect with staff, both leaders established regular quarterly meetings with CUCSA leadership.

This year under the new leadership of Vice President of Human Resources Dwaine Duckett, CUCSA was fortunate to have a new sponsor assigned to focus entirely on UC Employee Relations. Director of Employee Relations Howard Pripas attended our CUCSA quarterly meetings and provided guidance and support to CUCSA leadership and our delegates. In working with CUCSA, Director Pripas has also started researching and reviewing the Educational Benefits papers CUCSA produced in the past three years.

In addition, CUCSA fully benefited from the attention and support of Staff Advisor to the Regents Ed Abeyta and Staff Advisor Designate to the Regents Juliann Martinez. Ed and Juliann also attended all of the CUCSA meetings and delivered information on topics that are important to the Regents and advised the delegation on ways to effectively communicate our concerns to the Regents. CUCSA leadership worked very closely and in rhythm with the Staff Advisors to the Regents as we were appointed to serve on the Post Employment Benefits and Commission on the Future. Important staff issues such as Educational Benefits, furloughs, UC advocacy and the

accessibility to the Regents required the need for active and constant communications and coordination.

At the beginning of the CUCSA year, Student Regent Jesse Bernal, Student Regent Designate Jesse Cheng, and Academic Senate Chair Henry Powell were meaningful and inspirational as they helped set the tone for our future meetings.

Due to budget reductions, CUCSA also held our first videoconference for our December meeting between UC Office of the President and UC Riverside. We were fortunate to have Vice President Patrick Lenz, Chief Financial Officer Peter Taylor, and Director Gary Schlingen join us to present valuable insights and information pertinent to staff.

At UCLA and UCSB, the Chancellors welcomed us to their campus and at UC Davis, due to the Chancellor being away from her office, the Provost and EVC welcomed us. To start the year with the welcome reception at the Chancellor's residence at UCLA and ending the year with Chancellor Yang joining us for lunch proved particularly meaningful. At our last meeting, we were also particularly appreciative Regent Norman Pattiz made special arrangements to join us.

This year was especially difficult for CUCSA leadership and the delegates due to the furloughs and significant campus budget reductions. CUCSA would not have been able to accomplish so much without the valuable contributions of Chair Elect Brian Gresham, Secretary Sue Anderson, and the extremely dedicated delegates. A special acknowledgement is well deserved for Sue as her role went well past the traditional duties of the CUCSA Secretary. She served as a critical component of our leadership team and also created a professional development program for the delegates.

Lastly, CUCSA expresses our sincere appreciation to the supervisors, support staff, and families who have supported us through these challenging times. CUCSA continues to be an amazing organization to serve the University of California's goals of research and providing Californians accessibility to quality higher education. The significant support of those mentioned here make CUCSA's contributions possible.