**CUCSA Workgroups**

The CUCSA workgroup consists of a team of leaders. While the designated team leader will be responsible for coordinating everyone’s efforts and facilitating the process, everyone is expected to fully contribute to the group’s efforts and outcome. Please consider these leadership characteristics as you work together and be the type of team member with whom you’d like to work:

|  |  |  |  |
| --- | --- | --- | --- |
| Proactive | Flexible/Adaptable | Good Communicator | Respectful |
| Enthusiastic | Open-Minded | Seek Feedback | Open to Change |
| Resourceful | Appreciative | Knowledgeable | Organized |
| Evaluative | Consistent | Initiative | Supportive |

**CHAIR RESPONSIBILITIES** (with input from workgroup members)

* **Provide framework for workgroup success**: Clarify workgroup purpose, work with team to define project scope, ensure ongoing communication, etc.
* **Assess team’s strengths to workgroup productivity**: Determine whose strengths lend themselves to which tasks, so that this individual can take the lead or offer guidance to the rest of the team
  + Writing and editing skills = drafting the report or proofreading other’s contribution
  + Layout and design = visual construction or graphics for the report
  + Excel spreadsheets and charts = integrating data into the report
  + Research background/interest = knowledge of key resources
  + Creativity and Innovation = generating new ideas and recommendations
  + Collegial and influence skills = conducting interviews
* **Send meeting reminders prior to each meeting:** logistics (dial-in info), meeting agenda (incl. deliverables), participant list
* **Facilitate each meeting/con-call:**  confirm agenda and solicit changes, address agenda items, close by reviewing progress against project plan and confirming next steps
* **Distribute meeting minutes following each meeting:**  discussion highlights, action items (assignments, responsibilities, deadlines), logistics for next meeting (*Note: rotate the assignment of taking meeting minutes*)
* **Check progress against project timeline:** During the meeting, review timeline and make appropriate adjustments
* **Determine who is responsible for what and when it is due:** leverage members’ strengths, maintain a balanced workload, and assign tasks when appropriate
* **Obtain input from CUCSA leadership before acting on CUCSA’s behalf**: sending surveys, contacting UCOP, etc. needs to be considered through a broad lens and in the context of all CUCSA activities
* **Coordinate and ensure compilation of workgroup report**

**WORKGROUP MEMBER RESPONSIBILITIES**

* **Contribute**
* **Collaborate**
* **Communicate**
* **Constructive Conflict and Resolution**
* **Complete Assigned Work**

**CUCSA LEADERSHIP RESPONSIBILITIES**

* **Provide Guidance**
* **Identify Resources**
* **Communicate**
* **Monitor Progress**
* **Approve Workgroup Actions, as needed**

**2016-2017 CUCSA WORKGROUP TIMELINE AND DELIVERABLES**

**SEPTEMBER 7, CUCSA MEETING – INAUGURAL WORKGROUP MEETING**

* **Introductions**
  + Name, role, campus, strengths/interests, busy times, etc.
  + Could give you a sense of what folks are bringing to the table
* **Establish regular meeting schedule**
  + Highly recommend every 2 weeks, beginning ASAP
  + Send Outlook meeting request for the whole term.
  + Remain flexible, as needed.
* **Begin to Clarify Project Scope**
  + What this project will and will not address.
  + What needs to be done, and what will not be done.
  + Define the criteria for measuring success.Sep

*NOTE: The following items may not be completed during the 1st meeting, but should be completed shortly thereafter.*

* **Clarify Project Scope**
  + What this project will and will not address.
  + What needs to be done, and what will not be done.
  + Define the criteria for measuring success.
* **Agree on Project Deliverables** 
  + Mandatory, work group report.
  + Optimal, useful resources for local Staff Assemblies or campus leadership
* **Identify key stakeholders and resources for information**
* **Brainstorm key tasks or milestones** 
  + Typically includes data gathering, data analysis, recommendations, CUCSA presentations
* **Establish preliminary timeline**
* **Determine who is responsible for what and when it is due**
  + If team members are not volunteering, ask for volunteers…then, move to delegating assignments

**SEPTEMBER 30**

* **Finalize project scope document summarizing key information** *(sample attached)*
  + Use for ongoing reference to track progress and edit.
* **Obtain CUCSA leadership approval of scope**

**OCTOBER - NOVEMBER**

* **Draft surveys or interview guides, as needed**
  + Obtain leadership input before sending surveys or scheduling interviews.
* **Identify resources and begin to collect research**

**DECEMBER 7 – 9 CUCSA MEETING – PROJECT UPDATE PRESENTATION**

* **Overview of project scope, deliverables, milestones, timeline**
* **Early discoveries based on initial research and interviews**
* **Solicit delegates input or support**

**JANUARY – FEBRUARY**

* **Review findings to-date**
* **Determine what additional information is needed** **based on preliminary findings**
* **Adjust scope**
  + Timeline, deliverables, etc.
  + If required, obtain leadership input.

**MARCH 1 – 3 CUCSA MEETING – PROJECT UPDATE PRESENTATION**

* **Changes to scope**
* **Preliminary findings from surveys, interviews, research, etc.**
* **Early conclusions**
* **Solicit delegates input or support**

**APRIL – MAY**

* **Complete data gathering and analysis**
* **Agree on workgroup final conclusions and recommendations/”asks” of UCOP**
* **Determine sections of final report**
* **Write the report**
* **Edit the report**

**JUNE 5**

* **1st draft of workgroup report is complete**
* **Draft report is used to create final workgroup presentation**

**JUNE 7 - 9 CUCSA MEETING – FINAL PROJECT PRESENTATION**

* **Project purpose**
* **KEY findings and final analysis**
* **Recommendations/”asks” of UCOP leadership**
* **Solicit delegates input or support**

**JUNE 16 – WORKGROUP REPORT FEEDBACK, COMMENTS, EDITS**

* **Obtain workgroup report feedback from CUCSA leadership**
* **Edit the workgroup report, as needed**
* **Remember to inform or involve fellow workgroup members, as appropriate**

**JUNE 23- FINAL WORKGROUP REPORT DUE**

* **Final workgroup report due**

**RESOURCES**

* [**CUCSA Website**](http://cucsa.ucr.edu/workgroup_reports.html)– See past workgroup reports.
* [**CUCSA Sharepoint Site**](http://cucsa.ucr.edu/delegate_resources.html)– See past workgroup reports, store supporting documentation, and save work in shared folders.
* **Google Drive (formerly Google Docs)** – Collaboratively work on report in real time.
* **Samples and Templates**
  + Presentation Samples (December, March and June)
  + Group Writing Documents
  + Sample Agenda and Meeting Minutes
  + New Report Template
  + Presentation Template
  + Sample Reports