# CUCSA 2011 – 2012 Annual Report

## Table of Contents

CUCSA: History & Mission................................................................................................................................. 2

- A Brief History of the Council of University of California Staff Assemblies ......................... 2
- The Mission of the Council of University of California Staff Assemblies ......................... 4

CUCSA: Relationship to Other UC System-Wide Entities.............................................................. 5

- Staff Advisor to the Regents .................................................................................................................. 5
- Senior Leadership at Office of the President ................................................................................... 5
- Academic Senate ................................................................................................................................. 6

CUCSA: Year in Review .......................................................................................................................... 7

- Council Composition .......................................................................................................................... 7
- Spotlight on Career Counseling ......................................................................................................... 9
- Quarterly Meetings ............................................................................................................................... 9
- Committees & Work Groups ............................................................................................................... 11

  - *Educational Benefits Work Group* ................................................................................................. 11
  - *Performance Management Work Group* ..................................................................................... 12
  - *Talent Analytics Workgroup* ......................................................................................................... 13
  - *Internal Operations Workgroup* .................................................................................................... 15

- 2012 – 2013 Leadership Transition ................................................................................................. 16

- Acknowledgements ............................................................................................................................. 17
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.

2011: CUCSA Chair invited to serve on Campus Climate Study Team.

2012: CUCSA Chair invited to serve on search committee for new UC Provost.
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 2011–12 CUCSA delegation continued to fulfill and extend its mission. This document represents an overview of the work undertaken by CUCSA during the 2011–12 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, Juliann Martinez and Kathy Barton) 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. This year, the CUCSA leadership team met monthly with the Staff Advisor to the Regents and Designate.

Senior Leadership at Office of the President
In 2011–12, 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 Nathan Brostrom, Executive Vice President for Business Operations, Dwaine Duckett, Vice President for Human Resources and CUCSA’s new formal sponsor, Joseph Epperson, Systemwide Employee Relations Director.

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

- UC Staff Engagement Survey
- Personnel Policy 60: Layoff and Reduction in Time from Professional and Support Staff Career Positions
- Salary Actions for Non-Represented Staff
- Educational Benefits for Staff
- Performance Review Compliance
- Career Counseling
- Staff-Student Engagement on Student protests
- Personnel Policy 34 - Incentive and Recognition Awards Plans
- Phased Retirement Programs

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**

CUCSA Leadership met this year with Chair Robert Anderson and Vice Chair Robert Powell. 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 merit increases for non-represented staff and educational benefits.
**CUCSA: Year in Review**

**Council Composition**
This year’s CUCSA delegation consisted of three executive officers (Chair Ravinder Singh, Chair-Elect Steve Garber, and Secretary Gerard Au), 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:

<table>
<thead>
<tr>
<th>Name</th>
<th>(Position)</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ravinder Singh</td>
<td>(Chair)</td>
<td>UC Office of the President</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Research Analyst</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Institutional Research</td>
</tr>
<tr>
<td>Steven Garber</td>
<td>(Chair-Elect)</td>
<td>UC Berkeley</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Business Services Director</td>
</tr>
<tr>
<td>Gerard Au</td>
<td>(Secretary)</td>
<td>UC Los Angeles</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Director, Information Technology/CIO</td>
</tr>
<tr>
<td>Donna Seaward</td>
<td></td>
<td>UC Berkeley</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Lead Faculty Assistant</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Haas School of Business</td>
</tr>
<tr>
<td>Greg Ryan</td>
<td></td>
<td>UC Berkeley</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ergonomics Specialist</td>
</tr>
<tr>
<td></td>
<td></td>
<td>University Health Services</td>
</tr>
<tr>
<td>Rob Kerner</td>
<td></td>
<td>UC Davis Medical Center</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IT Manager</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Department of Plant Sciences</td>
</tr>
<tr>
<td>J.P. Eres</td>
<td></td>
<td>UC Davis</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Manager, Patient Support</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Patient Support &amp; Volunteer Services</td>
</tr>
<tr>
<td>Patricia Collette</td>
<td></td>
<td>UC Irvine</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Department Administrator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Electrical Engineering &amp; Computer Science</td>
</tr>
<tr>
<td>Jasson Valdry</td>
<td></td>
<td>UC Irvine</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Director of Technology</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Claire Trevor School of the Arts</td>
</tr>
<tr>
<td>Victor Chan</td>
<td></td>
<td>Lawrence Berkeley National Laboratory</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OCFO</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Matrixed to Life Sciences Division</td>
</tr>
<tr>
<td>Elizabeth Bautista</td>
<td></td>
<td>Lawrence Berkeley National Laboratory</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Computer Systems Engineer</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Computing Sciences Division</td>
</tr>
<tr>
<td>Name</td>
<td>UC/Institution</td>
<td>Position/Department</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------------</td>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>Brandie Henderson</td>
<td>UC Los Angeles</td>
<td>Policy Analyst, Academic Senate Executive Office</td>
</tr>
<tr>
<td>Tanya Williams</td>
<td>UC Los Angeles</td>
<td>Revenue Manager, Conference Services</td>
</tr>
<tr>
<td>Annette Garcia</td>
<td>UC Merced</td>
<td>Director of Administrative Operations, Division of Student Affairs</td>
</tr>
<tr>
<td>Rachael Martin</td>
<td>UC Merced</td>
<td>Coordinator, Graduate Student Services</td>
</tr>
<tr>
<td>Kenneth Feer</td>
<td>UC Office of the President</td>
<td>Senior Policy Analyst, Universitywide Academic Senate</td>
</tr>
<tr>
<td>Jeannie Urban</td>
<td>UC Office of the President</td>
<td>Principal Analyst, Human Resources</td>
</tr>
<tr>
<td>Steve Lerer</td>
<td>UC Riverside</td>
<td>Resident Director, Aberdeen Inverness Hall</td>
</tr>
<tr>
<td>Tim Willette</td>
<td>UC Riverside</td>
<td>Policy Analyst &amp; Information Officer, Finance &amp; Business Operations</td>
</tr>
<tr>
<td>Anna Gandolfini</td>
<td>UC San Diego</td>
<td>College Business Officer, John Muir College</td>
</tr>
<tr>
<td>Lawana Richmond</td>
<td>UC San Diego</td>
<td>Business Analyst, BFS Mail Services</td>
</tr>
<tr>
<td>Kollette Masey</td>
<td>UC San Francisco</td>
<td>Accreditation &amp; Edu Dev Manager, Office of Continuing Medical Education</td>
</tr>
<tr>
<td>Michael Jaffe</td>
<td>UC San Francisco</td>
<td>Facilities Coordinator, Department of Clinical Pharmacy</td>
</tr>
<tr>
<td>Martha Olsen,</td>
<td>UC Santa Barbara</td>
<td>Asst to Director of Resource Planning, Office Vice Chancellor Student Affairs</td>
</tr>
<tr>
<td>Greta Carl-Halle</td>
<td>UC Santa Barbara</td>
<td>Student Affairs Manager, Computer Science Department</td>
</tr>
<tr>
<td>Ebony Lewis</td>
<td>UC Santa Cruz</td>
<td>Associate Director, Office of Undergraduate Admissions</td>
</tr>
<tr>
<td>John Steele</td>
<td>UC Santa Cruz</td>
<td>Programmer Analyst, Information Technology Services</td>
</tr>
</tbody>
</table>
Spotlight on Career Counseling
This year, CUCSA continued to offer a formal individual professional development program to its delegates. 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 at their home locations. 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 15 related skill dimensions. The four meta-competency areas are communication, problem-solving, performance management, and leadership/influence.

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. The 2011 – 2012 meetings took place at:

- UC Irvine (September 2011)
- UC Santa Cruz (December 2011)
- UC Merced (March 2012)
- UC Berkeley / LBNL (June 2012)

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
- Nathan Brostrom, Executive Vice President
- Robert Anderson, Academic Senate Chair
- Dwaine Duckett, Vice President Human Resources
- Peter Taylor, Chief Financial Officer
- Grace Crickets, Chief Risk Officer
- Cathy O’Sullivan, Director, Working Smarter Project
- Gwendolyn Mosely, Director, Staff Development and Diversity
The Board of Regents:
- Penny Herbert, Staff Advisor to The Regents
- Kevin Smith, Staff Advisor Designate to The Regents
- Fredrick Ruiz, Regent

Chancellors:
- George Blumenthal, Chancellor, UCSC
- Dorothy Leland, Chancellor, UC Merced

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

UCI:
- Michael R. Gottfredson, Executive Vice Chancellor and Provost
- Robert Demerjian, Director, Environmental Planning and Sustainability

UC Santa Cruz:
- Margaret Delany, Vice Chancellor, Planning and Budget
- Ashish Sahni, Associate Chancellor and Chief Diversity Officer

UC Merced:
- Gina Johnson, Principal Analyst, Institution Planning and Analysis
- Tom Lollini, Associate Vice Chancellor, Campus Architect
- Hubert Walsh, Merced City Supervisor

UC Berkeley/LBNL:
- Peggy Huston, Director, Operational Excellence Program Office
- Jeannine Raymond, Assistant Vice Chancellor, Human Resources, UCB
- Paul Alivisatos, Laboratory Director, LBNL
- Vera Potapenko, Chief Human Resources Officer, LBNL

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

Educational Benefits Work Group

CUCSA has a long history of advocating for employee educational benefits and educational benefits for their dependents. These issues are critical to the University’s ability to recruit and retain a talented workforce, which is vital in fulfilling its mission in research and teaching. The current economic climate, with an increasing cost of living and decreasing benefits subsidies for UC employees, in addition to the uncertain work environment, makes this an even more important benefit for staff development and morale.

If UC can provide enhanced educational opportunities to our employees, we will have more highly educated, satisfied employees. Programs such as these can save the University millions of dollars currently wasted because high quality employees leave for positions with better pay and benefits. Hiring and training new employees is much more expensive than educating existing employees. Many years of stagnant salaries and increasing workloads has left employees with very low morale. Adding a benefit such as this would be a great first step in turning that trend around. Improved skills and an increase in morale translate to better productivity. CUCSA feels that by redesigning the employee education benefit we cannot only save the University money while expanding the resource, but we can improve the quality of employees, as well as help retain excellent employees. If education is one product UC produces, it only makes sense to offer it as a benefit to its employees.

The 2011-12 CUCSA Educational Benefits Workgroup focused on three areas: analyzing the current UCOP Reduced Fee Enrollment Policy (PPSM 51 and Regental Policy 7502), comparing UC’s policies with best practices among comparative universities, and investigating UC Extension educational options.

First, the workgroup reviewed the past reports and recommendations by former CUCSA workgroups, as well as Academic Senate reports to the Regents. Many valid recommendations were made, and in most cases would have been supported by the Regents – if funding were available. The workgroup followed-up on the critical issues raised in previous reports: 1) The inconsistent implementation of the current policy across UC locations was a major issue in the 2008-09 report, and this issue remains. 2) There are no central tracking metrics or identified persons responsible for managing the program. 3) The structure of the current policy is not well designed for today’s workforce: Confining the benefit to degree-seeking students debars most staff. Further, as we explain below, the current 2/3 reduction of full-time tuition for full-time status is not functionally or financially sound; changing how the benefit is calculated will both make the program more affordable and allow more access.

The workgroup then reviewed the educational benefits for employees and their dependents at the eight universities frequently compared to the UC system. All of the comparator universities had
programs with clearly defined documentation on their websites and a program contact person. Most of the universities within the Comparator Eight had educational benefits of varying depth and scope for employees’ dependents.

The workgroup also conducted an extensive analysis of the California State Universities (CSU) policy since they have a similar organizational structure and adhere to the same California tax code. The CSU has a strong tuition fee waiver program for staff and faculty that is overseen by the Office of the Chancellor’s Human Resources department and has program coordinators at each of the 23 campuses. This fee waiver benefit can be transferred to an employee’s dependent by the employee, if the employee does not want to use the program.

UC Extension and employee development programs were also investigated at the different UC locations. These programs are inconsistently implemented, and only some campuses offer fee waivers for extension classes and employee development classes.

Thus CUCSA suggests that UC should alter their current Reduced Fee Enrollment Programs (RFEP) to include:

- Centralized program administration to track metrics and review usage data
- Elimination of the admission requirements for employees, enabling them to register for one to three classes per semester/quarter as long as they do not displace an admitted student,
- Fee waivers for all courses offered by UC, UC Extension and staff development offices
- The ability for UC employees to register for courses at any UC location
- A similar model to the CSU program that allows employees to transfer their benefit to dependents

**Performance Management Work Group**

Performance management practices are not necessarily always in place, even in large organizations like the University of California. Our research shows that individual campuses have integral parts implemented, but not a consistent approach of managing employee performance throughout the system. In order for the UC System to successfully recruit and retain staff, it is imperative to properly manage and engage the current workforce by providing them with challenging work, ample career opportunities and development, and by providing staff with the tools they need to improve overall performance.

As such, the University would be well served by implementing a Performance Management Initiative with the following best practices:

- Create a standard method of setting goals that are aligned with the UC mission
• Provide continuous reviews and feedback at least once each quarter, while establishing a clear understanding of expectations
• Require an annual appraisal of each employee
• Implement an automated system to simplify tasks like reminders and provide a storage area of the appraisals for easy access
• Create a culture of mentorship and sponsorship to foster career development
• Ensure accountability and compliance throughout the system
• Properly document the process where it is easily accessible for all parties

As the University of California moves toward a merit based compensation system, and salary increases are tied to performance, it is of the utmost importance to implement a process that enhances the retention of staff who are the best in this industry. Successful use of a performance management system will enable us to improve program delivery, increase employee engagement, and improve productivity. In addition, the process will focus staff back to organizational priorities, aligning individual efforts toward the University’s goals, provide managers and staff with a documented basis for improving capabilities, and help to adjust our current reward system to recognize high performers. Lastly, this process is in accordance with the University of California’s Talent Management mission as established by the Leadership and Development Consortium.

Talent Analytics Workgroup
The 2010-11 CUCSA Demographics Working Group examined the available employee statistical and summary data collected by UC. The information gathered was compared to similar data reflected by other large employers. The comparison yielded several suggestions regarding the collection and presentation of employee data that would enhance UC employee relations’ strategic planning by exploring new axes of analysis and augmenting current efforts. Of particular note was the recommendation of the working group to focus on normative demographic (or pipeline) data with a greater emphasis on framing and explanatory text to enhance UC reports. The working group also suggested that data on total remuneration should be analyzed across many metrics, rather than as a single aggregate, and that transactional data regarding internal personnel changes be tracked and reported differently. Finally, the working group encouraged greater study of employee workplace and work/life satisfaction in order to drive recruitment and retention strategies.

This year, the CUCSA Talent Analytics Working Group continued on the same trajectory, seeking to provide specific, concrete examples of models to UC employee relations and to provide strategic justifications for the development and implementation of those tools across all UC locations. A critical step in that process was to conduct informational interviews with system-wide human resources officers. We are grateful to Joe Epperson, Dennis Larsen, and Jennifer D’Amico-Murphy for their time and cooperation with this project. Another recurring
effort was to investigate best practices and determine where UC could make the greatest strides in positioning itself to be an “employer of choice” as demonstrated through successful employee recruitment and retention. Indeed, the theme of successful staff recruitment and retention frames this report.

Becoming a national “employer of choice” in the current environment requires careful study and strategic planning. Having a more robust and standardized set of demographic data elements for analytical use will greatly assist each of the UC campuses in developing and implementing strategies for succession planning and employee development and growth. Thus, these analytical tools will allow UC to better recruit and retain workers and empower UC to be California’s “employer of choice” for today and into the future.

It is within this framework that the CUCSA Talent Analytics Working Group identified three broad topics for investigation: 1) having a better understanding of our comparators and the market; 2) defining the “retirement bubble” and its impacts; and 3) adding a robust and flexible system-wide data system. Our exploration of these topics yielded the following actions that would assist UC in developing and implementing effective strategies:

1. fully consider previous UC efforts with similar goals and use its internal resources, such as faculty experts, as often as possible
2. complete the in-progress title code cleaning and streamlining process being undertaken as the payroll component of UPath
3. specify the competitors against which the rewritten descriptions are to be compared, and the rationale for each included competitor
4. utilize comparative data more robustly
5. report payroll and HR transactional data in a manner conducive to career arc tracking
6. gain a better understanding of the approaching retirement bubble
7. require greater localized strategic planning, including succession planning and plans for retaining institutional memory
8. conduct systematic and standardized engagement surveys
9. encourage non-monetary rewards and recognition, such as flexible schedules and other individualized work-life balance enhancement options
10. systematize and standardize the use of exit interviews
11. develop and use systemized and standardized “on-boarding” and transition interviews/surveys
12. systematize and standardize performance reviews, preferably following the 360-degree model
13. matrix and integrate both the quantitative and qualitative data
   a. create and track over time several “straw men”, or employee archetypes
   b. analyze UC’s competitive place and UC’s employee satisfaction with multivariate analyses
**Internal Operations Workgroup**

The 2011-12 Internal Operations (IO) Workgroup developed a long list of potential projects aimed at updating processes and improving the organizational efficiency and effectiveness of CUCSA. Two themes emerged: communication and procedural improvements.

In terms of communication, the projects identified primarily addressed communication outside of the CUCSA delegation. This includes communication between delegates and local staff assembly officers, between CUCSA and its alumni, and between CUCSA and the larger UC community.

The IO Workgroup ultimately undertook four projects to improve communication:

- Cross Staff Assembly Position Lists: to offer opportunities for officers in staff assemblies across campuses to communicate and collaborate;
- CUCSA Alumni Network: to engage past CUCSA delegates and provide opportunities for continued participation;
- Press Releases: to increase awareness of the issues with which CUCSA is involved and its accomplishments; and
- Facebook Fan Page: to offer additional avenues of staff to engage with CUCSA and provide a platform for general information sharing.

The procedural projects were aimed at improving the way CUCSA conducts business. Projects in this area focused on clarifying procedures and internally sharing information more effectively.

The four projects that came to fruition regarding procedural improvements were:

- Elections Process Revision: updated and formalized the process for electing CUCSA officers;
- CUCSA History: updated the timeline and highlights on the CUCSA website;
- SharePoint Online Archives: established a new SharePoint site for CUCSA and began to populate the site with historical and functional information; and
- Junior Delegate Information Packet and Orientation: Updated the junior delegate information sheet and created a new orientation PowerPoint to be utilized with new junior delegates prior to the first meeting of the year.

In addition to the specific projects that were undertaken, the workgroup made several recommendations on the future structure of the Internal Operations Workgroup. The most significant proposed change overall is to establish certain on-going roles to ensure continuity of certain critical functions of the organization. The proposed on-going roles are: chair, alumni network manager, cross staff assembly list manager, website/SharePoint manager and communications manager.
Finally, there were a number of projects that had been identified as areas for attention or improvement, but were not actually undertaken in the 2011-12 year. These projects should be considered for action by the 2012-13 workgroup:

Communication:

- Further development of the Alumni Network;
- Establishment of mechanisms for sharing best practices across campus staff assemblies; and
- Plan and convene a Staff Assembly Summit.

Procedures:

- Review and revision of CUCSA bylaws;
- Identification of a formal protocol for discussion of issues and voting; and
- Development of a consistent process for collecting feedback from the campuses.

In summary, the Internal Operations Workgroup perceives a need to develop and adhere to consistent procedures that can be sustained from year to year as the membership of the organization changes.

2012 – 2013 Leadership Transition

At the final meeting of the 2011-12 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 2012-13 year.

The new CUCSA executive officers will be:

**Chair:** Steve Garber, *UC Berkeley*

**Chair-Elect:** Kenneth Feer, *UCOP*

**Secretary:** Annette Garcia, *UC Merced*

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 2012-13 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 continued regular quarterly meetings with CUCSA leadership. This year under the leadership of Vice President of Human Resources Dwaine Duckett, CUCSA was fortunate to have a sponsor assigned to focus entirely on UC Employee Relations. Director of Employee Relations Joseph Epperson attended our CUCSA quarterly meetings and provided guidance and support to CUCSA leadership and our delegates.

In addition, CUCSA fully benefited from the attention and support of Staff Advisor to the Regents Penelope Herbert and Staff Advisor Designate to the Regents Kevin Smith. Penny and Kevin 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 around many issues affecting staff. Important staff issues such as Educational Benefits, UC advocacy and the accessibility to the Regents required the need for active and constant communications and coordination.

CUCSA would not have been able to accomplish so much without the valuable contributions of Chair Elect Steve Garber, Secretary Gerard Au, and the extremely dedicated 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.