Council of UC Staff Assemblies

2022-23 Final Workgroup Presentations

Spring Quarter Meeting 2023, UCSF
Welcome

Jen Bowser (UC Santa Barbara), CUCSA Operations Officer

- Land Acknowledgement
- Presentation Outline
- Zoom audience has been muted.
- Q&A is being monitored.
- This webinar is being recorded.
Workgroup Background

Dennis McIver (UC Office of the President), CUCSA Chair

- Why these priorities?
- Why this presentation?
Workgroup Introduction

John Bodenschatz (UC Irvine), CUCSA Chair-elect

- Advancement
  Jeremy Brooks (UC Berkeley)

- Total Compensation
  Nathan McCall (UC Santa Cruz)

- Wellness & Staff Experience
  Shira Miner (UC Santa Barbara)

- CUCSA Strategic Plan
  Jeremy Thacker (UC Irvine)
Retention Through Advancement

CUCSA Spring Quarter Meeting 2023, UCSF

Group Members:
- Jeremy Brooks, UCB - Workgroup Chair
- Andrea Graeser, UCSF
- Lucine Torosian, UCLA
- Neli Lopez, LBNL
- Agam Patel, UCR
- Erica White, UCOP
Agenda

1. Background on Our Work
2. Areas of Focus
3. Recommendations
Scope for this Workgroup

- Reviewed Project Charge
  - How can our current advancement infrastructure be refined/enhanced to help retain UC staff?

- Read through the CORO Report, Advancing UC: Retaining Our Workforce
  - Created a Table on Recommendations

- Identified Areas of Focus
  - Meeting with UC Leaders & CHROs
  - Find and promote existing resources
  - Career coaching
  - Mentorship programs
  - Career tracks
2021 CORO Report

Five key themes important to retaining talent:

- Adopt a Relational Rather than a Transactional Management Approach
- **Invest in Employee Training and Development**
- Provide Reasonable Scheduling Flexibility
- Offer Competitive Compensation
- **Streamline Processes for Resources and Retention**
2021 CORO Report

Key recommendations for our workgroup:

- **Recommendation A:** Increase engagement among supervisors, managers and human resources staff to enhance shared knowledge of career advancement policies and best practices
- **Recommendation C:** Make internal recruitment and promotion procedures clear and accessible for all
- **Recommendation E:** Actively promote systemwide tools and resources
Meeting with UC Leaders & CHROs

- **Template Agenda**
  - Encourage supervisors to make [PPSM-50: Professional Development](#) a priority
- The supervisor plays a huge role in understanding what an employee wants to do, providing them with opportunities, and being their advocate. **We need to focus on the quality of supervisors and provide training for them.**
- Staff fellowship programs that allow staff to try out another position within the organization require funding but can be helpful in retaining staff and giving staff opportunities to see themselves in other areas within the organization.
- Training directors at each UC location can partner with staff organizations like CUCSA to strategize on what to prioritize for staff training.
- CUCSA can help UCOP and locations share information on how to navigate and find career track information for reclassification and advancement.
Promoting Existing Resources

- UC provides education and training to its employees and the public
- We identified systemwide career and professional development opportunities
  - Talent Management Courses
    - UC Managing Implicit Bias Series
    - Search Advisory and Hiring Committee Best Practices
  - UC Systemwide People Management Series and Certificate
  - UC Management Skills Assessment Program (MSAP)
  - UC Women’s Initiative for Professional Development
  - UCB Next Opportunity at Work (NOW) Conference
  - UCR Staff Conference
- Increase opportunities for advancement, promotion, and potential for leadership positions
Career Coaching

- One-on-one career coaching is not available at all locations

- Career coaching is a valuable resource employees can use to help advance their careers

- Recommendation is for UC Systemwide to support locations with no dedicated career coaching, either:
  - Through offering career coaching through My UC Career, or
  - Providing locations with funding to employ/fund career coaches
Mentorship

- Research shows that mentorship programs increase employee engagement and retention

- All UC locations have some form of a mentorship program, either centralized (i.e., run by HR, Staff Assembly, etc.) or decentralized (units with their own program)

- To obtain additional information, a brief survey was sent to CUCSA delegates. We received information from CUCSA delegates and mentorship program coordinators
Mentorship

Best Practices:

- Guidelines, trainings, and expectations for mentors and mentees
- “Speed-dating” style matching
- Just-In-Time mentoring
- Meet-and-greet and social mixers are always helpful for engagement
- Feedback surveys at the end of each cohort

Recommendations:

- Create more awareness of mentorship programs, including on UCnet
- Active recruitment of more mentors. Provide incentives such as gift cards, etc. Consider group mentoring.
- Move the program to HR rather than it being run by Staff Assembly
- Locations with no centralized program develop a centralized program
Career Tracks and Pathways

- Each location (except for Berkeley lab) has their own Career Tracks resource page
  - Career Tracks organize job titles & show development pathways

- Some locations offer career pathway training programs
  - Staff Fellowship Program - UC Berkeley
  - Workforce Development Programs - UCSF
    - Clinical - CNA, MA
    - Research
    - IT
    - Healthcare Administration
  - Berkeley Lab Career Pathways
Recommendations - Partnership with HR

- Local staff assemblies and CUCSA delegates should have strategic partnerships with their locations’ HR department that include regular meetings, involvement in engagement strategies, and input on supervisory training.

- Local staff assemblies should be involved in the interview and onboarding process for the CHRO.

- All UC supervisors should make PPSM-50: Professional Development a priority for their employees.
Recommendations - Staff Mobility

- Speed up the process for reclassification, promotion, and granting stipends at each location. Include consistent timelines for these processes.

- Each location should look to grow examples of clear career pathways within departments to encourage staff advancement mobility.

- Develop a fellowship program at the different locations to support career mobility within the campus community.
Recommendations - Further Areas of Focus

- Ensure that all UC locations provide career coaching.

- UC Systemwide be a resource to UC location mentorship programs by providing support and guidance, especially in addressing challenges such as how to recruit mentors.

- Career Tracks job descriptions and job builder tools should be available to all UC locations.
Recommendations - Further Areas of Focus

- Systemwide Talent Management should facilitate additional integrated talent management strategies in collaboration with location partners to further address shared priorities, leverage best practices, and eliminate redundancies.

- Systemwide Talent Management should make existing professional development resources available to all UC staff on a centralized webpage.
Questions?
Retention via Total Compensation

CUCSA June Meeting 2023, UC San Francisco

Group Members:
- Nathan McCall, Santa Cruz (Workgroup Chair)
- Erika M Leon, Riverside
- Ana Esquivel, Los Angeles
- Nicola Gruen, Office of the President
- Theresa Short, Lawrence Berkeley National Lab
Retention via Total Compensation | Goal

Scope
- Charge: “How can our current compensation model be refined and enhanced to help retain UC staff?”
- Multi-year approach

Starting Point
- Establishing a foundation of awareness around compensation gaps to realize meaningful, measurable, and sustainable change
- Past CUCSA delegation work - THANK YOU!

Suggestions
- How can CUCSA workgroups carry on this work next year...
We selected four deliverables to raise awareness at multiple levels throughout our organization:

1. UC Wide Total Compensation Matrix  
   ○ Staff Assemblies
2. Staff Housing & Dependent Tuition Assistance  
   ○ CUCSA
3. Compensation Benefits Survey  
   ○ Systemwide HR
4. Understanding Your Compensation Situation  
   ○ Individual and Regents
1. **UC Wide Total Compensation Matrix**

Categorization of Benefits

**Total Compensation Benefits**
The total monetary and non-monetary benefits given to an employee in exchange for their work. Certain benefits may have a financial value, even though an employee receives no cash.

- **Monetary Compensation Benefits**
The financial value that an employee receives in exchange for their services. This monetary value can include wages, salary, commissions and bonuses.

- **Non-Monetary Compensation Benefits**
Compensation that doesn't involve cash, such as gym memberships, tuition reimbursement, professional development classes, etc. Certain benefits may have a financial value, even though an employee receives no cash.
1. UC Wide Total Compensation Matrix

<table>
<thead>
<tr>
<th>Monetary Compensation Benefits</th>
<th>Ag &amp; Natural Resources</th>
<th>Berkeley</th>
<th>LBNL</th>
<th>Davis</th>
<th>Irvine</th>
<th>Los Angeles</th>
<th>Merced</th>
<th>Riverside</th>
<th>San Diego</th>
<th>San Francisco</th>
<th>Santa Barbara</th>
<th>Santa Cruz</th>
<th>UCOP</th>
</tr>
</thead>
</table>

Non-Monetary Compensation Benefits:
- Compensation includes benefits such as job security, tuition discounts, and access to healthcare and professional development opportunities.
- Certain benefits may affect employees' overall compensation package.

*Total Compensation Benefits is the total cash and non-cash payments given to an employee in exchange for their work. Certain benefits may have a financial value, even though a team member receives no cash.*
1. **UC Wide Total Compensation Matrix**

Suggestions

- CUCSA Delegation should refresh each year in the fall.
- Add new categories as necessary.
## 2. Staff Housing & Dependent Tuition Assistance

<table>
<thead>
<tr>
<th>Original Goal:</th>
<th>Focus on Staff Retention by through highlighting Staff Housing and Tuition Benefits for dependents</th>
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</thead>
<tbody>
<tr>
<td>How do we accomplish this goal:</td>
<td>Through the creation of compensation matrix, we identified shortfalls of available housing and dependent tuition benefits</td>
</tr>
<tr>
<td>Current State:</td>
<td>Created survey for CUCSA Delegates for deeper look into current and future state of these benefits</td>
</tr>
<tr>
<td>Recommendation for next steps:</td>
<td>Enable future CUCSA Delegates to have data and further partner with UC HR to address total comp of dependent tuition and housing benefits</td>
</tr>
</tbody>
</table>
2. Staff Housing | Survey Results

Current State:

- Sub-market housing available for rent, purchase, and transitional housing for those moving into the area
- Primarily for faculty, but staff are allowed in when there are no faculty that want them
- Employees are eligible for mortgage assistance through Landed, which is a company that works with campus to assist staff/faculty in identifying rental and purchase opportunities (this program is currently waitlisted)
- The majority of campuses we heard from either do not offer housing benefits or offer minimal housing benefits to staff
2. Staff Housing | Survey Results

Desired Future State:

- Make the same faculty loan program also available to staff
- Provide home loans for staff at sub-market rate
- Provide down payment assistance or shared equity options for first-time home buyers
- Focus housing efforts within a reasonable distance of UC location
2. Dependent Tuition Assistance | Survey Results

Current State:

- Dependent tuition assistance program does not exist and is highly recommended
  - John Bodenschatz is on a systemwide committee focused on options for dependent tuition assistance
  - We have provided our survey results to assist the committee
- A dependent tuition assistance program can help with:
  - Recruitment
  - Retention
  - Financial stability
- In addition to dependent tuition assistance, there were also many comments towards increasing benefits for staff tuition assistance
2. Dependent Tuition Assistance | Survey Results

Desired Future State:

- **Dependent Tuition Assistance considerations:**
  - Full or partial for dependents of staff at any UC campus
  - Provide comparable benefits to comparator organizations

- **Staff Tuition Assistance considerations:**
  - Wave University extension course fees
  - Graduated system of reimbursement, based on the years of qualified service and active employment
  - Provide comparable benefits to comparator organizations
2. Staff Housing & Dependent Tuition Assistance

Suggestions:

- Structure all data from the survey similar to the UC Wide Total Compensation Matrix. (will be completed in June 2023)
- CUCSA to form a specific “ask” for advocacy, such as:
  - Shared equity
  - MOP loan for staff
  - Give staff equal opportunities as academic employees
  - Graduated system of reimbursement, based on years of service
3. Compensation Benefits Survey

What was the original goal?
- Gain an understanding of employee sentiment regarding current benefits offered

What did we do to accomplish the goal?
- Forged a relationship with Jay Henderson, AVP of Total Rewards and Missy Matella, AVP Employee & Labor Relations
- Discovered they already began the process of creating a survey

What is the current state?
- Expressed interest for partnering with systemwide HR on creating an employee benefits survey
- The development of the survey content is on hold until next year
3. Compensation Benefits Survey

Suggestions:

- Proactively follow up with systemwide HR in August 2023 to check on the status of the effort.
- Partner with systemwide HR to compose the questions and help to publicize.
- Use the results for relevant advocacy.
4. Understanding Your Compensation Situation

What was the original goal?
- Equip employees with clear and specific salary data they could appropriately advocate at the regental level during public comments

What did we do to accomplish the goal?
- Consulted with:
  - Jay H. Systemwide HR AVP re: approach and data access
  - Molly Greek UCOP CIO regarding tool usage or development

What is the current state?
- Live web page for Understanding Your Compensation Situation that is employee-centric and in a systemwide, neutral location
4. Understanding Your Compensation Situation

One Tool, Two Outcomes

Employees will either...
1. ...build understanding and realize they’re better off than they thought!
2. ...build understanding and visualize advocacy.
4. Understanding Your Compensation Situation

Build Understanding...

Questions on the website:

- What is Total Compensation?
- How is the market rate for a Classification determined?
- How can I find the market rate for my Classification?
- Should I be paid at the market rate?
- How does my salary compare to the market rate?
4. Understanding Your Compensation Situation

Build Understanding...

<table>
<thead>
<tr>
<th>Estimated Annual Cost of Benefits</th>
<th>University Costs</th>
<th>Employee Costs *</th>
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<tbody>
<tr>
<td>Medical Insurance</td>
<td>$23,450.52</td>
<td>$1,035.60</td>
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<tr>
<td>Dental Insurance</td>
<td>$1,539.48</td>
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<tr>
<td>Vision Insurance</td>
<td>$129.12</td>
<td>$0.00</td>
</tr>
<tr>
<td>Social Security</td>
<td>$4,590.00</td>
<td>$4,590.00</td>
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<tr>
<td>UC Paid Life Insurance</td>
<td>$47.04</td>
<td>$0.00</td>
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<tr>
<td>UC Paid Disability Insurance</td>
<td>$96.48</td>
<td>$0.00</td>
</tr>
<tr>
<td>Primary Retirement Benefit</td>
<td>$7,170.00</td>
<td>$4,200.00</td>
</tr>
<tr>
<td><strong>Estimated Total Cost</strong></td>
<td><strong>$37,022.64</strong></td>
<td><strong>$9,825.60</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Estimated Total Compensation (Benefits and Salary)</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Cost of Benefits as a % of Salary</td>
</tr>
<tr>
<td>University Cost of Benefits</td>
</tr>
<tr>
<td>Total Compensation (Salary + Benefits)</td>
</tr>
</tbody>
</table>
4. Understanding Your Compensation Situation

Build Understanding...

Salary as a Percentage of Market Rate

<table>
<thead>
<tr>
<th>Your Salary</th>
<th>Pay Range Midpoint</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>$60,000.00</td>
<td>$65,000.00</td>
<td>92%</td>
</tr>
</tbody>
</table>

Salary as a Percentage within the Pay Range

<table>
<thead>
<tr>
<th>Your Salary</th>
<th>Pay Range Minimum</th>
<th>Pay Range Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>$60,000.00</td>
<td>$45,000.00</td>
<td>$85,000.00</td>
</tr>
</tbody>
</table>
4. Understanding Your Compensation Situation

Visualize Advocacy…

Question on the website:
- How can I use this information to advocate for change?

Example:
“My name is Michael Scott. I have two years of service in my classification of ADMIN SUPV 2, and I am paid 49% of the market rate, according to the Office of the President salary analysis.”
4. Understanding Your Compensation Situation

Suggestions:

● Publicize this tool broadly and routinely in CUCSA and local outlets.
● Highlight the number of people who use the tool’s template at regental meetings during public comment.
● Add “cost of housing” section, linking to federal and state data.
● Consider a geo-differential table for cross-location comparison.
Summary of Total Compensation | Deliverables

We selected four deliverables to raise awareness at multiple levels throughout our organization:

1. UC Wide Total Compensation Matrix  
   Completed
2. Staff Housing & Dependent Tuition Assistance  
   Final Stage
3. Compensation Benefits Survey  
   Deferred FY24
4. Understanding Your Compensation Situation  
   Completed
Retention via Total Compensation
Wellness & The Staff Experience

CUCSA Spring Quarter Meeting 2023, UC San Francisco

Workgroup Lead: Shira Minerd, UCSB

Group Members:
- Desiree Hennon, UCSD
- Greta Carl-Halle, UCSB
- Kaeleigh Hayakawa, UCI
- Courtney Klein, UCB
- Vanity Campbell, UC ANR

CONTENT WARNING: Mention of mental health concerns and suicide.
Employee Health and Wellness (Well-Being)

Workgroup Definition

Employee well-being is made up of five key dimensions consisting of:

- Physical and psychological safety and security
- Connection and community through social support and belonging
- Autonomy and flexibility integrated to create work-life harmony
- Purpose through dignity and meaning
- Personal and professional growth

Defining a Framework

Five Essentials for Workplace Mental Health & Well-Being

Components
Creating a plan with all workers to enact these components can help reimagine workplaces as engines of well-being.

Protection from Harm
- Prioritize workplace physical and psychological safety
- Enable adequate rest
- Normalize and support mental health
- Operationalize DELA* norms, policies, and programs

Connection & Community
- Create cultures of inclusion and belonging
- Cultivate trusted relationships
- Foster collaboration and teamwork

Work-Life Harmony
- Provide more autonomy over how work is done
- Make schedules as flexible and predictable as possible
- Increase access to paid leave
- Respect boundaries between work and non-work time

Mattering at Work
- Provide a living wage
- Engage workers in workplace decisions
- Build a culture of gratitude and recognition
- Connect individual work with organizational mission

Opportunity for Growth
- Offer quality training, education, and mentoring
- Foster clear, equitable pathways for career advancement
- Ensure relevant, reciprocal feedback

*Diversity, Equity, Inclusion & Accessibility

Other Considerations

Employees face different challenges that impacts the five key dimensions of employee well-being, including, but not limited to:

- Occupation, setting, organizational structures
- Personal characteristics such as race, sex (including pregnancy, gender identity, and sexual orientation), immigration status, national origin, age, disability, or genetic information
- Socio-economic, political, and cultural factors
- Poorer health, shorter lifespans, higher health care costs, and less access to health care compared with other wealthy countries
- Economic inequality, food insecurity, and housing insecurity
- Household, educational, and medical debt

Charge

Create a framework for addressing employee retention through the lens of wellness and the staff experience, and further charged with identifying local and systemwide resources for employees and supervisors to use.

Our Vision

The University of California (UC) is the workplace of choice for Californians and the nation, prioritizing equitable workforce engagement and an organizational culture that positions all employees to thrive towards a more resilient, diverse, and competitive California. Through the UC workforce and the University’s combined missions of teaching, research, and public service, California will exceed its standing as the 5th largest gross domestic product in the world.

Steps taken to investigate the issue

- Reviewed previous workgroup reports on staff wellness
- Reviewed the 2021 engagement survey
- Attended Wellness Managers meeting in the fall, winter and spring quarters to gather information and feedback
- Met individually with Wellness Managers
- Healthy Campus Network meetings in Fall and Spring
- Reviewed research on best practices and recommendations for Workplace Health and Wellbeing from:
  - The American Heart Association
  - NIOSH
  - US Surgeon General
- Collected impact survey testimonials (280 responses systemwide)
Staffing Numbers & Burnout

“Lack of sleep, high anxiety, pain due to stress, feeling sick all the time, having a lot of personal responsibilities, sick-dead-dying family and friends, sick family and children, lack of general happiness, the mood in the office is bleak, our engagement has deteriorated.”

“I hope that the university takes a hard look at how staff are treated and valued. The overall morale is low and the workloads are not sustainable. The pride we used to have in our work is waning. We want to do good work and restore UC to its former glory help us to make that happen before it’s too late.”

“Our university experiences high turnover and vacant positions. Yet, somehow, those who remain cannot get raises that would allow them to live and raise families in this HCOL area. Until salaries are enough to rent and buy houses near UC campuses, high turnover and the eventual burnout of those who remain will persist. This is a systemic problem. The 5,000 vacant jobs aren’t the result of the Great Resignation; they are the result of UC not investing in staff.”
Ask to Senior Leadership: Change the message

- “Lean and mean” is not a good thing
- Stop normalizing overwork
- Change the expectation that it is business as usual
- Change the culture—attitude of acceptance
- Call to action: Lend your voice to our voice
- Advocate for more staffing/staff salary increases

KAROSHI 過労死

death by overwork
“Reasonable Workload” and Sustainability

A reasonable workload is the #1 one mitigator of stress and burnout, and the #3 mitigator of depression.

Adjusting employee workloads can reduce stress and improve overall well-being.

There's no one-size-fits-all solution to managing work volume, but re-examining company-wide expectations and re-distributing workloads can create happier, healthier employees.

For Managers and Supervisors

- This group is a key element when considering staff wellness and experience as folks who both experience high levels of stress and pressure and have the potential to “make or break” a supervisee’s experience with UC.

- We recommend:
  1. Developing manager and supervisor skills around advocacy, intervention, and leadership through evidence-based training, guidelines, and recommendations.
  2. Build accountability and promote the imperative nature of wellness and staff experience through incorporation of wellness-related responsibilities into manager and supervisor position descriptions.
  3. Promote mindset and social norms shifts across UC through intentional implementation of campaigns and modeling by location leaders.
Advocating for a Director of Systemwide Employee Wellbeing

- **Issue** - There is no system wide effort to connect and support location wellness managers and healthy campus network.

- **Defining the role** - This role would provide subject matter expertise and guidance on employee well-being initiatives and evaluate current practices to help develop and execute systemwide guidelines.

- **Benefits** - Accountability for UC locations to act on guidelines. Helps enforce a minimum wellness standard.

- **Action** - In order for this to work there would need to be a directive from the President to the Chancellor's to support this.
Wellness Ambassadors

Wellness Ambassadors are a coordinated group of volunteers dedicated to making the workplace healthier.

- In partnership with campus wellness coordinators/managers to promote UC Wide and local campus wellness initiatives
- Expands resources for wellness coordinators/managers who have budget, staff and time limitations
- Serve as a trusted point of contact for specific VC areas and departments
- Campuses with funding challenges can use non monetary recognition for ambassador efforts such as recognition on wellness sites, certificates of participation in personnel file, STAR awards, swag, etc.
- Can be certified to be a DPP coach which may allow compensation for time depending on staff status
- Successful ambassador program models: UC Riverside, UC Irvine, UC Berkeley
Healthy Department Certifications

Healthy Department Program to certify departments as models of health.

- Certified departments serve as a model for other areas and should have a point of contact for other departments to reach out to when working towards their own certification
- Will help expand the campus wellness coordinator/manger reach for programs and initiatives
- Departments recognized publicly on wellness web sites & newsletters
- Departments get a certificate/award for the office once certified
- Certification can be coordinated with the ambassador program
- Department certification model: UC Riverside, UC Davis
Advocating for a Healthy University

Through the Okanagan Charter

1. Embed health into all aspects of campus culture, across the administration, operations and academic mandates.

2. Lead health promotion action and collaboration locally and globally.
Advocating for a Healthy University

Call to Action #1: Embed health into all aspects of campus culture, across the administration, operations and academic mandates

A. Embed health in all campus policies.
B. Create supportive campus environments.
C. Generate thriving communities and a culture of well-being.
D. Support personal development.
E. Create or re-orient campus services. Coordinate and design campus services to support equitable access, enhance health and well-being, optimize human and ecosystem potential and promote a supportive organizational culture.
Advocating for a Healthy University

Call to Action 2: Lead health promotion action and collaboration locally and globally

A. Integrate health, well-being and sustainability in multiple disciplines to develop change agents.
B. Advance research, teaching and training for health promotion knowledge and action.
C. Lead and partner towards local and global action for health promotion. Build and support inspiring and effective relationships and collaborations on and off campus to develop, harness and mobilize knowledge and action for health promotion locally and globally
Recommendations

1. Hiring goals for staff that are on par with student and faculty growth numbers. Lean and mean is not the answer, rather we need to change the message on overwork and burnout.

2. Funding for at least one wellness manager and a programming budget for each campus and location.

3. Building accountability and critical skills for managers and supervisors through evidence-based training, guidelines, and leadership.

4. A Director of Systemwide Employee Wellbeing within the Office of the President serving all UC employees.

5. Adaptation of the Okanagan Charter as a directive from the President to the campuses to sign on to be a "health promoting university".
Questions?
Strategic Plan Workgroup

CUCSA Spring Quarter Meeting 2023, UC San Francisco

Group Members:
- Jeremy Thacker (UCI) - Workgroup Chair
- Ian Cooke (UCM)
- Lauren McDiarmid (UCD)
- Khoban Kochai (UCDH)
Outline

● Strategic planning process overview
  ○ Stakeholders
  ○ Data Gathering & Prioritization
  ○ Drafting & Revision
● Goals
  ○ Objectives
  ○ Measures
  ○ Strategies
● Next steps
  ○ Feedback
  ○ Finalization
  ○ Adoption & Implementation
Process Overview

1. Readiness Assessment
2. Identify Stakeholders
3. Information Gathering
4. Identification of Strategic Issues
5. Prioritization
6. Strategy formulation
7. Review and revision
8. Adoption
9. Description of Organization in the Future
10. Assessment & Revision Plan
11. Implementation
# Stakeholders & Data Gathering

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Collab. Planning</th>
<th>Focus Groups</th>
<th>Delegate Outreach</th>
<th>Feedback Surveys</th>
<th>Town Hall</th>
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<td>CUCSA Leadership</td>
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<td>CUCSA Current Delegates</td>
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<td>CUCSA Alumni</td>
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Strategic Issue Identification

- Augment existing CUCSA resources to increase capacity for impactful work
- Collaborate with HR (systemwide & CHROs) on issues of mutual concern
- Cultivate strategic structural alliances with key partners
- Ensure that non-represented staff voices are at the table in policy & key hiring decisions
- Establish a professional posture that balances ambition, practicality, assertiveness, and partnership
- Facilitate cross-pollination and promotion of successes and best practices
- Gather system-wide data that identifies issues, informs recommendations, and monitors progress
- Maintain a physical presence with stakeholders and peers
Strategic Issues Prioritization

CUCSA Current & Past Delegate Priorities Survey

Demographic Information

Ranking of our 16 identified strategic issues

Opportunity to add additional input

Response Analytics

CUCSA Identity

SWOT Analysis

Strengths

Weaknesses

Opportunities

Threats
Goals, Objectives, Measures, & Strategies

Goal 1
Solidify and enhance CUCSA’s identity as the UC-wide partner for non-represented staff advocacy

Goal 2
Improve organizational continuity and support to increase effectiveness and capability

Goal 3
Strengthen partnerships to increase influence and inclusion
Goals, Objectives, Measures, & Strategies

- Goal
- Narrative
- Objectives
- Measures
- Suggested Strategies
Goal 1: Solidify and enhance CUCSA’s identity as the UC-wide partner for non-represented staff advocacy

Objectives

1.1. Strengthen and align a focused sense of identity and purpose among CUCSA’s leadership and delegates
1.2. Increase recognition of CUCSA among Regents and systemwide leadership
1.3. Standardize staff inclusion in systemwide and local hiring committees, policy decisions, and other staff-affecting decision-making bodies
1.4. Serve as a systemwide data sharing hub to empower staff advocates and boost legitimacy
1.5. Increase awareness of CUCSA, its mission, and how to interface with it among non-represented staff
Goal 1: Solidify and enhance CUCSA’s identity as the UC-wide partner for non-represented staff advocacy

Sample Measures

- CUCSA newsletter analytics
- Number of volunteers for public comment on CUCSA messaging
- Perception survey

Sample Strategies

- Establish a procedure for inventorying, tracking, and publicizing the status of CUCSA recommendations and programs
- Create an “Advocacy Statistics” one-pager for distribution to local staff assemblies and other partners; establish a standing refresh cycle
- Identify staff data that would be useful from an advocacy perspective: obtain, aggregate, and publish
Goal 2: Improve organizational continuity and support to increase effectiveness and capability

Objectives

2.1. Improve continuity and follow-through to build on past efforts and improve accountability
2.2. Improve delegate onboarding and rotation to make the delegates more effective while they’re here
2.3. Maximize percentage of delegate time spent on high-value, issue-oriented work
Goal 2: Improve organizational continuity and support to increase effectiveness and capability

Sample Strategies

- Conduct an annual review and planning assessment in the summer that includes the delegation to discuss progress on the last year’s goals and objectives and current opportunities and challenges.
- Provide First Year delegate onboarding training that includes expectation setting for normal CUCSA activities and time commitment.
- Clarify the role of Second Year delegates as mentors to their corresponding First Year delegate.

Sample Measures

- First-year delegate experience survey
- Markers and tracking artifacts coming out of an annual review session
- Allocation of funds and/or dedicated staff time towards operational needs
Goal 3: Strengthen partnerships to increase influence and inclusion

Objectives

3.1. Improve collaboration with local staff assemblies
3.2. Increase access to and influence with local leadership
3.3. Improve transparency and coordination with UC Systemwide HR partners
3.4. Strengthen long-term engagement with and better leverage alumni
3.5. Leverage existing UC infrastructure, such as UCOP State Governmental Relations, to coordinate and align efforts related to governmental advocacy
**Goal 3: Strengthen partnerships to increase influence and inclusion**

<table>
<thead>
<tr>
<th>Sample Strategies</th>
<th>Sample Measures</th>
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<tbody>
<tr>
<td>● Raise awareness of CUCSA activities and opportunities for partnership</td>
<td>● Number of interactions with local staff assemblies, leadership etc</td>
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<tr>
<td>● Provide useful reference materials about CUCSA identity and activities, including improvements to website and newsletter to serve as a better reference to local staff assemblies</td>
<td>● Number of attendees at interactions (tracking sheet)</td>
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<tr>
<td>● Create forums for cross-pollination of best practices among local staff assemblies</td>
<td>● Frequency of budget update</td>
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Next Steps

● Feedback from this presentation and final revisions
● Strategic plan document
  ○ Executive summary
  ○ Purpose
  ○ Methodology
  ○ Goals, objectives, measures, and strategies
  ○ Vision of the future
  ○ Monitoring and evaluation plan
● Adoption
  ○ Approval by CUCSA Chair
  ○ Appointment of responsibility for implementation and tracking
Feedback

Goals
Narratives
Objectives
Measures
Suggested Strategies

Goal Review Document & Feedback Form

Please respond by Sunday, June 26th
Questions?
Open Q&A

Dennis McIver (UC Office of the President), CUCSA Chair

- Please submit your questions using the Q&A function.
- Zoom audience will remain muted.
- Questions will be posed to the workgroups on the Zoom audience’s behalf.
- We will get to as many questions as time allows.
- Will follow up by email to any we are unable to address today.
Next Steps

Dennis McIver (UC Office of the President), CUCSA Chair

- Town Hall
- Regents Meeting
Closing Remarks

John Bodenschatz (UC Irvine), CUCSA Chair-elect

- Executive Board
- Thank you!