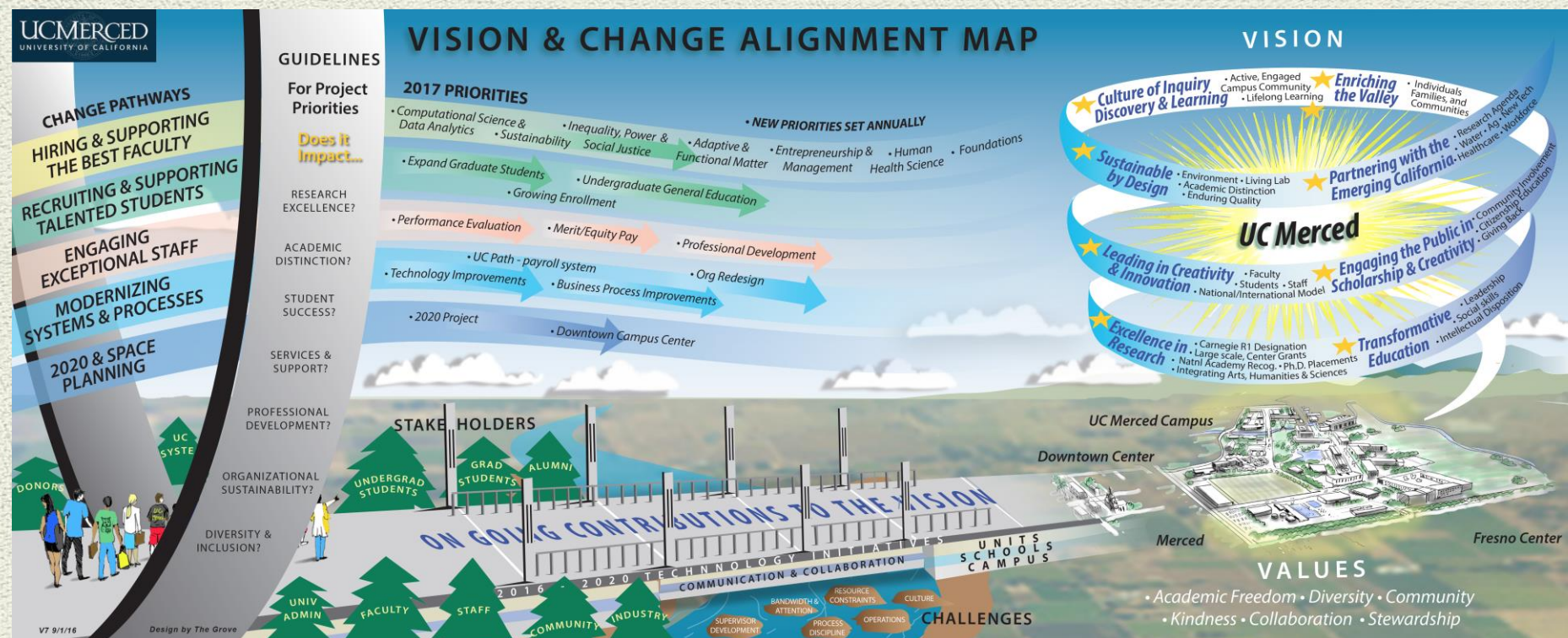


UC Merced Workforce Planning

Leadership Council
March 22, 2017



Meeting Agenda

- ♦ **Meeting Agenda:**

- ♦ **Opening Remarks** – 10min – Chancellor
- ♦ **Set up and ground rules** – 5min
- ♦ **Presentation 1** – 10min – Sam Traina, Research Excellence & Academic Distinction
- ♦ Small group discussion on Presentation 1 – 10min
- ♦ Large group debrief and capture for presentation 1 – 10min
- ♦ **Presentation 2** – 10min – Charles Nies, Student Success
- ♦ Small group discussion on Presentation 2 – 10min
- ♦ Large group debrief and capture for presentation 2 – 10min
- ♦ **Presentation 3** – 10min – Michael Reese, Organizational Efficiencies and Sustainability
- ♦ Small group discussion on Presentation 3 - 10min
- ♦ Large group debrief and capture for presentation 3- 10min
- ♦ **Closing Thoughts**
- ♦ How are we going about it?
- ♦ How will you play a part today?

Set up

- ◆ Tables of 4-8 (no less than 4)
- ◆ Each table elects a note-taker and a spokesperson
- ◆ After each presentation, groups will discuss and answer questions
- ◆ All the groups will be asked to share results
- ◆ Results will be captured and charted

Ground Rules

- ◆ All contributions are worthwhile, even weird or way-out ideas
- ◆ Suspend judgement! The purpose of the summit is to gather feedback for leaders, not to problem-solve
- ◆ Divergent, or contradictory ideas and feedback are OK!

Table Questions

- ◆ **What are the top 3-5 actions you would recommend for the workforce planning group? What do they need to be aware of (but may have missed)? What needs to happen to insure success?**
- ◆ **What are the “Pro’s” of the plan?**
- ◆ **What are the “Con’s” of the plan?**

More info:

- ◆ **Additional info and feedback:**
- ◆ **jmartin22@ucmerced.edu**

Research Excellence and Academic Distinction

*Tom Peterson, Susan Amussen, Michael Scheibner,
Mark Matsumoto, Juan Meza, Jill Robbins, Ed Klotzbier,
Veronica Mendez, Annette Garcia, Autumn Salazar,
Brian Powell, Haipeng Li, Sam Traina*

- ◆ Most of the topics considered by this group involve direct support of faculty in their research and teaching missions.
- ◆ Topics are broken up into two general areas:
 - ◆ ones that are more transactional and represent standard business processes across the University
 - ◆ and areas that require specialized knowledge or specialized services that are somewhat unique to faculty

- Before we can come up with a strategy for new FTE, we needed to understand how the current FTE are utilized
- Local Research Administration will serve as an example

- ♦ One challenge presented by the current structures is that we have a small number of staff in each unit (Schools and ORUs) who are all doing the same job.
- ♦ For example: Research Administration staff in all of the ORUs and the Schools.
 - ♦ Provide local support to the faculty
 - ♦ Little capacity for backup
 - ♦ Varied levels of training and experience across the units
 - ♦ Varied job descriptions between the units.

Going forward....

- ◆ Creating some mechanism for backup
- ◆ Standard job descriptions and responsibilities across units
- ◆ Standardized training for all staff in this area
- ◆ Determine number of staff needed for projected growth of faculty

- ◆ Think about those areas in the Schools that can benefit from a similar approach
- ◆ What areas are really School centric, perhaps instructional support.

- ◆ Campus wide support units
 - ◆ Library
 - ◆ Assessment
 - ◆ Specialized Research Support, research cores.....

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Student Success

Student Success

Charles Nies

Convener, Vice Chancellor of Student Affairs

Marjorie Zatz

Vice Provost and Dean of Graduate Education

Elizabeth Whitt

Vice Provost and Dean of Undergraduate Education

Donna Jones

Assistant Vice Chancellor, Campus Budget Office

Brian O’Bruba

Interim Assistant Vice Chancellor for Campus Life, Student Affairs

Elisabeth Gunther

Chief Campus Counsel

Jan Mendenhall

Associate Vice Chancellor for Development, Development and Alumni Relations

De Acker

Director of Campus Climate

Peter Schuerman

Associate Vice Chancellor for Research and Economic Development

Chou Her

Interim Chief of Police

Ed Klotzbier

Associate Chancellor and Chief of Staff, Office of the Chancellor

Laura Hamilton

Associate Professor, School of Social Sciences, Humanities and Arts (Faculty Rep)

Laura-Beaster Jones

Assistant Dean for Faculty Support, School of Natural Sciences (Faculty Rep)

Alisha Kimble

Assistant Dean, Undergraduate Education (Staff Rep)

Student Success: Review of WFPs

Does this position directly impact STUDENT SUCCESS (increase access to or improve student services and support)

- ◆ Does this position deliver on our enrollment goals?
- ◆ Does this position advance the support students' academic accomplishments (retention, graduate rates, time to degree, etc.)?
- ◆ Does this position expand or create specific programs in meeting student needs outside the classroom (personal & professional development, community-building, health and wellness, etc.)?
- ◆ Does this position promote equity in student support services?

Student Success: Look at Functions

- ◆ Can this position be shared?
- ◆ What is the most effective alignment to deliver the services?
- ◆ Does this function need to be done by UCM? A 1.0 FTE?
- ◆ If we shifted administrative functions, can we better use current FTEs?

Student Success: Research

- ◆ Group 1: positions identified as necessary to meet required service expectations.
- ◆ Group 2: positions that are needed to meet basic functionality requirements.
- ◆ Group 3: positions that are high need programs in risk of elimination without grant support. These programs serve some of our most vulnerable students.
- ◆ Group 4: positions that, if not filled, pose major risks around campus climate and campus enrollment goals.
- ◆ Group 5: positions that could be filled via graduate student assistantships and internships.

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UC Merced: A Conceptual Staff Operating Model

The Operational Efficiency and Sustainability Workgroup

Organizational Efficiencies and Sustainability

Michael Reese

Convener, Vice Chancellor of Business and Administrative Services

Kyle Hoffman

Vice Chancellor of Development and Alumni Relations

Dan Feitelberg

Vice Chancellor of Planning and Budget

Gregg Camfield

Vice Provost for the Faculty

Ann Kovalchick

Associate Vice Chancellor of Information Technology

Abigail Rider

Assistant Vice Chancellor of Real Estate Services

Jill Orcutt

Associate Vice Chancellor of Enrollment Management, Student Affairs

Andy Boyd

Executive Director, Business and Financial Strategic Initiatives

Luanna Putney

Associate Chancellor and Senior Advisor to the Chancellor

Mike Riley

Assistant Vice Chancellor, Business and Financial Services

Mike McLeod

Associate Vice Chancellor of Physical Operations, Planning & Development

Ed Klotzbier

Associate Chancellor and Chief of Staff, Office of the Chancellor

Kurt Schnier

Professor, School of Social Sciences, Humanities and Arts (Faculty Rep)

Paul Maglio

Professor, School of Engineering (Faculty Rep)

Paul Garza

Employee & Labor Relations Consultant (Staff Rep)

WHY

- ◆ Existing Administrative configuration is not organizationally sustainable at 10,000FTE.
- ◆ Financial constraints on creating new FTE will not deliver results needed to support the mission.
- ◆ OES team chose to analyze new ways to organize the work.

Current State Challenges

- ◆ Different segments of local administration, central services and centers of expertise (HR, APO, Procurement, etc.) activities are blended.
- ◆ Systems and processes have multiple points of entry and are not consistent or standardized.
- ◆ Process variability creates challenges for internal controls.
- ◆ Actions are initiated by various roles within the institution.
- ◆ Multiple technologies exacerbate process variation and limit visibility into the totality of the processes.

A segmented staffing approach

Activity Types:

Local Support

- Local support for faculty and staff

Initiation and Interface

- Point of contact and support for system related administrative work-flow
- Input of necessary information into work-flow

Centers of Expertise

- Specialized support for processes that require subject-matter expertise

Operations

- Provides transactional support for routine processes that are common to all campus populations

A staffing approach

- ◆ Local Administrative Support
 - ◆ Leadership support
 - ◆ Local faculty and department support (pooled when possible)
- ◆ Partnered with “Interface” Support (Faculty Liaisons, Administrative Generalists)
- ◆ Centers of Expertise
- ◆ Operational Teams

2 Types of Local Support

- ◆ Non-system Support
 - ◆ Leadership Administrative Offices (Chancellors, Deans, Vice Chancellors)
 - ◆ Chief of Staff (budget, space, operations)
 - ◆ Scheduling
 - ◆ Administrative Support
 - ◆ Faculty and administrative local support
 - ◆ Administrative support (scheduling, small events, copying, curriculum support, other) – any task that does not hit a central system
- ◆ System Interface
 - ◆ Workflow initiation for various types of administrative functions.

Interface Support

Liaisons or generalists who navigate for clients the following system-oriented processes:

- ◆ Travel and entertainment
- ◆ Facilities
- ◆ IT
- ◆ Procurement
- ◆ Hiring
- ◆ Research grants

Centers of Expertise

Provides specialized support for processes that require subject-matter expertise. Examples:

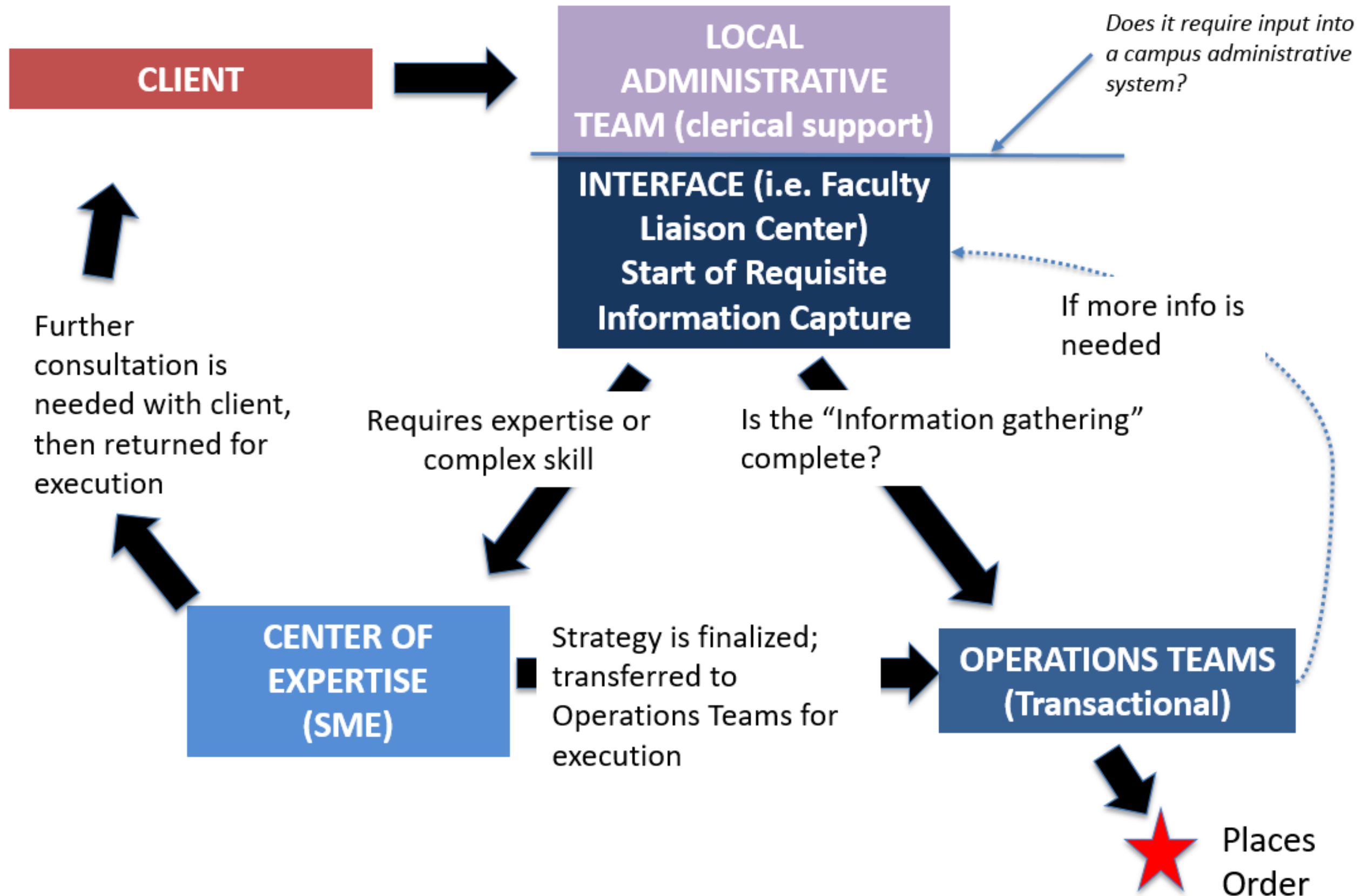
- ◆ Academic personnel
- ◆ Budget
- ◆ Information Technology
- ◆ Procurement
- ◆ Research administration
- ◆ Curriculum integration

Operational Teams

Provides transactional support for routine processes that are common to all campus populations. Examples:

- ◆ Building services
- ◆ Business services
- ◆ Custodial and grounds
- ◆ Information Technology (Desk support)
- ◆ Payroll processing
- ◆ Printing services
- ◆ Shipping and receiving

How it might work (concept)



How it might work (example)

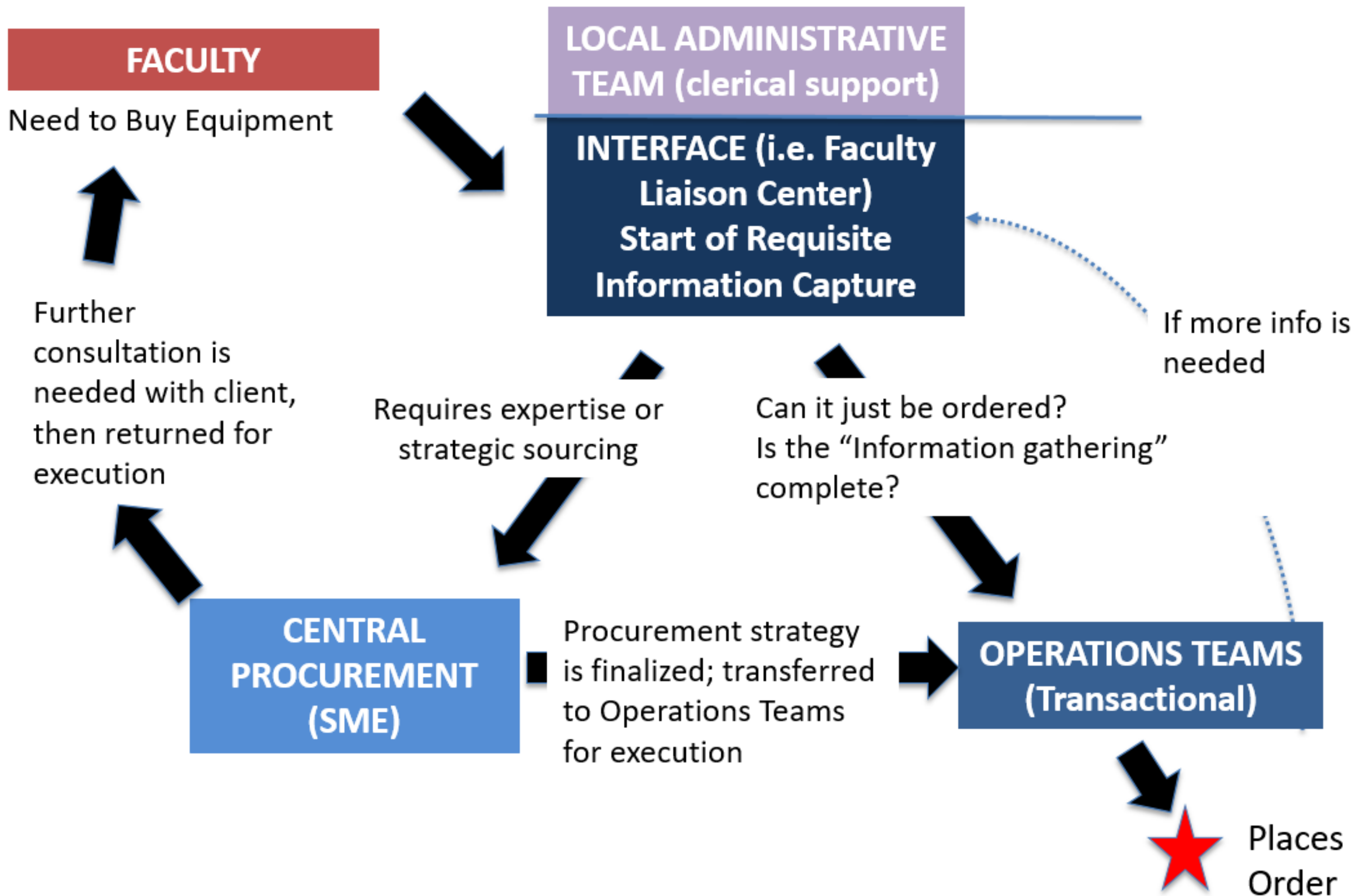


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