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.
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…….
Table Questions

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Student Success
<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
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<tbody>
<tr>
<td>Charles Nies</td>
<td>Convener, Vice Chancellor of Student Affairs</td>
</tr>
<tr>
<td>Marjorie Zatz</td>
<td>Vice Provost and Dean of Graduate Education</td>
</tr>
<tr>
<td>Elizabeth Whitt</td>
<td>Vice Provost and Dean of Undergraduate Education</td>
</tr>
<tr>
<td>Donna Jones</td>
<td>Assistant Vice Chancellor, Campus Budget Office</td>
</tr>
<tr>
<td>Brian O'Bruba</td>
<td>Interim Assistant Vice Chancellor for Campus Life, Student Affairs</td>
</tr>
<tr>
<td>Elisabeth Gunther</td>
<td>Chief Campus Counsel</td>
</tr>
<tr>
<td>Jan Mendenhall</td>
<td>Associate Vice Chancellor for Development, Development and Alumni Relations</td>
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<td>De Acker</td>
<td>Director of Campus Climate</td>
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<tr>
<td>Peter Schuerman</td>
<td>Associate Vice Chancellor for Research and Economic Development</td>
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<td>Chou Her</td>
<td>Interim Chief of Police</td>
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<tr>
<td>Ed Klotzbier</td>
<td>Associate Chancellor and Chief of Staff, Office of the Chancellor</td>
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<tr>
<td>Laura Hamilton</td>
<td>Associate Professor, School of Social Sciences, Humanities and Arts (Faculty Rep)</td>
</tr>
<tr>
<td>Laura-Beaster Jones</td>
<td>Assistant Dean for Faculty Support, School of Natural Sciences (Faculty Rep)</td>
</tr>
<tr>
<td>Alisha Kimble</td>
<td>Assistant Dean, Undergraduate Education (Staff Rep)</td>
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</table>
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

<table>
<thead>
<tr>
<th>Name</th>
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<tbody>
<tr>
<td>Michael Reese</td>
<td>Convener, Vice Chancellor of Business and Administrative Services</td>
</tr>
<tr>
<td>Kyle Hoffman</td>
<td>Vice Chancellor of Development and Alumni Relations</td>
</tr>
<tr>
<td>Dan Feitelberg</td>
<td>Vice Chancellor of Planning and Budget</td>
</tr>
<tr>
<td>Gregg Camfield</td>
<td>Vice Provost for the Faculty</td>
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<tr>
<td>Ann Kovalchick</td>
<td>Associate Vice Chancellor of Information Technology</td>
</tr>
<tr>
<td>Abigail Rider</td>
<td>Assistant Vice Chancellor of Real Estate Services</td>
</tr>
<tr>
<td>Jill Orcutt</td>
<td>Associate Vice Chancellor of Enrollment Management, Student Affairs</td>
</tr>
<tr>
<td>Andy Boyd</td>
<td>Executive Director, Business and Financial Strategic Initiatives</td>
</tr>
<tr>
<td>Luanna Putney</td>
<td>Associate Chancellor and Senior Advisor to the Chancellor</td>
</tr>
<tr>
<td>Mike Riley</td>
<td>Assistant Vice Chancellor, Business and Financial Services</td>
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<tr>
<td>Mike McLeod</td>
<td>Associate Vice Chancellor of Physical Operations, Planning &amp; Development</td>
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<td>Ed Klotzbier</td>
<td>Associate Chancellor and Chief of Staff, Office of the Chancellor</td>
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<tr>
<td>Kurt Schnier</td>
<td>Professor, School of Social Sciences, Humanities and Arts (Faculty Rep)</td>
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<tr>
<td>Paul Maglio</td>
<td>Professor, School of Engineering (Faculty Rep)</td>
</tr>
<tr>
<td>Paul Garza</td>
<td>Employee &amp; Labor Relations Consultant (Staff Rep)</td>
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</tbody>
</table>
Existing Administrative configuration is not organizationally sustainable at 10,000 FTE.

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)

CLIENT

LOCAL ADMINISTRATIVE TEAM (clerical support)

INTERFACE (i.e. Faculty Liaison Center)
Start of Requisite Information Capture

Does it require input into a campus administrative system?

If more info is needed

Requires expertise or complex skill

Is the “Information gathering” complete?

CENTER OF EXPERTISE (SME)

Strategy is finalized; transferred to Operations Teams for execution

OPERATIONS TEAMS (Transactional)

Places Order

Further consultation is needed with client, then returned for execution
How it might work (example)

**FACULTY**
Need to Buy Equipment

**LOCAL ADMINISTRATIVE TEAM (clerical support)**
**INTERFACE (i.e. Faculty Liaison Center)**
Start of Requisite Information Capture

- Requires expertise or strategic sourcing
- Can it just be ordered? Is the "Information gathering" complete?

**CENTRAL PROCUREMENT (SME)**
Procurement strategy is finalized; transferred to Operations Teams for execution

**OPERATIONS TEAMS (Transactional)**

If more info is needed

Further consultation is needed with client, then returned for execution

Places Order
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