

UNIVERSITY
OF
CALIFORNIA

Coro-UCOP Leadership Collaborative

Cohort Recommendations

2013

Executive Summary

The University of California Office of the President (UCOP) initiated a Coro Leadership Collaborative program in 2012/13, charging an initial cohort of 13 emerging leaders (Appendix A) from throughout the organization with developing approaches and recommendations for strengthening and improving relationships and communication between UCOP and UC campuses. This document summarizes key background and processes undertaken as well as outlining a set of recommendations and ways to measure progress towards improvement.

While learning leadership skills and techniques and building greater personal and organizational understanding in monthly meetings over a 12-month period, program participants also engaged in a diligent process of inquiry and review to inform the process and ensure representative involvement and input. The group conducted interviews and surveys with leadership at UCOP, UC Merced, and UC Davis. In addition, on-site visits were conducted to UC Merced and UC Davis, meeting with representative campus leaders and administrators. Feedback and input from those activities informed the Collaborative's recommendations centered around three key areas for improvement:

1. **Improved coordination between UCOP departments.** Though somewhat conflicting in direction, there were concerns about duplicative, redundant, or uncoordinated meetings and requests from/with campuses.
2. **Policy flexibility and clarity.** Both UCOP and campus leaders expressed support for policy flexibility that would allow campuses to meet specific or unique needs.
3. **Alignment of UCOP and campus goals.** Campus and UCOP leaders conveyed a need for a shared vision and strategic objectives that set a foundation for the system as a whole, while enabling campus individuality and flexibility.

Based on this feedback, the Collaborative offers the following recommendations:

1. **Develop and articulate a clear, strategic plan for UCOP.** Much has changed over the last several years with budget stress, changes in funding models and other organizational re-examination. The outcome has left many—within UCOP and throughout the system—hungry to better understand UCOP's role. Additionally, while many campuses have developed their own strategic plans or initiatives there is a lack of clarity on how and if those are shared across the system. By examining previous organizational reviews, capitalizing on new leadership opportunities with the arrival of a new President, and formalizing ways to bring various constituents together at regular intervals, UCOP has an opportunity to better articulate shared values, initiatives and priorities across the system.
2. **Improving collaboration and coordination.** UCOP must model improved collaboration and communication among divisions, departments and individual staff to reduce silos that cause inefficiencies and hurt credibility and effectiveness. This may include investing in collaborative technology tools, actively seeking more campus representation in discussions, and generally being better prepared and effective in meeting management. Ensuring that proper staffing support is assigned to systemwide initiatives is also critical in ensuring proper follow-through.
3. **Further clarify policy process and governance.** UCOP's Ethics Compliance and Audit Services office (ECAS) has been diligently involved in clarifying, inventorying and reviewing policy. Continuing to do so and further involving the campuses and allowing flexibility is critical in establishing a great sense of trust and collaboration. This would include greater communication on policy creation, input and review with campus constituents and reinforcing a shared goal of minimizing unnecessary constraints on campuses.

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Some of the challenges and opportunities outlined in this document are inevitable in large, complex organizations. The UCOP-Coro Collaborative has clearly demonstrated the benefits of attention, focus and leadership in these areas and welcomes the opportunity to lead further initiatives in support of improving relationships and collaboration during these critical times for the UC system.

Coro

Coro is a non-profit, non-partisan educational institute supported by foundations, corporations and individuals begun in San Francisco in 1942. Coro's mission is to prepare individuals for leadership through hands-on, collaborative learning in public, private, and non-profit settings.

UCOP-Coro Leadership Collaborative

The University of California Office of the President (UCOP) initiated a Coro Leadership Collaborative program in 2012/13. The UCOP-Coro program is custom-designed for UCOP leaders to develop techniques to enhance leadership abilities, build greater personal and organizational awareness, and establish a strong network of peers.

The first cohort of thirteen emerging leaders experienced learning opportunities to increase knowledge, awareness, and connections within the Office of the President and larger UC community. This occurred in twelve all-day meetings and associated activities, research and site visits, culminating in a group leadership challenge.

The 2012/13 UCOP-Coro team was presented with the following leadership challenge:

***How can the relationship and communication
between the campuses and UCOP be
strengthened and improved?***

Process of Inquiry

The 2012/13 UCOP-CORO cohort strategized in meeting this challenge. Our inquiry included surveys and interviews with leaders from UCOP, UC Merced and UC Davis; on-site visits to UC Merced and UC Davis (campus participants listed in Appendix B); application of Coro tools and techniques (Appendices C&D); and research of industry Best Practices (Appendix E). Information gathered from these activities informed our response to the challenge.

First, we asked the leaders to answer two questions around the themes of communications and relationships:

- **What are the most important components of effective communication and positive relationships between UCOP and the UC Campuses?**
- **What are the greatest opportunities for improving relationships between UCOP and the campuses?**

Responses to the above questions from campus leaders, as well as UCOP leaders, established the framework for two in-person visits to UC Merced and one to UC Davis. On the first UC Merced visit, we met with Chancellor Leland alone, and also with her Cabinet. We summarized the key themes that emerged from their survey responses and invited a deeper exploration of each theme, resulting in a very robust discussion. We then engaged participants in a concrete “Stop-Start-Continue” (Appendix D) exercise to generate specific, actionable suggestions. On the second UC Merced visit, we met again with Chancellor Leland, and also in small groups with select campus leaders to gain additional insight on several specific suggestions that emerged from the first visit.

UC Merced is unique as a young university with a unique set of challenges. The Collaborative expanded our inquiry beyond UC Merced to a second campus to develop recommendations more applicable to UC’s mature campuses. UC Davis was selected for its proximity; size; and the diversity it provides with its medical school. We met with Chancellor Katehi alone, then separately with her Cabinet. The UC Davis agenda mirrored the first UC Merced visit, again resulting in a very robust discussion and a number of specific, actionable suggestions.

What We Heard

Our campus visits were very productive because they were personal. This introduced our diverse group to a wide range of campus stakeholders across the range of campus units and enabled better communications and insight into the unique perspectives of each campus and their relationships with UCOP.

Several themes emerged from the surveys and interviews of senior leaders at UCOP, UC Merced and UC Davis that may lead toward enhanced communications and relationships between UCOP and all campuses. Most stakeholders feel these communications and relationships are generally good. UC Davis and UC Merced leaders indicated that UCOP provides individualized attention in certain areas based on their unique needs, and all those interviewed believe in-person exchanges and communications between UCOP and the campuses are very important. However, they cite several areas for improvement, including stronger coordination amongst UCOP departments, especially citing streamlined systemwide requests, meetings and communications; policy clarity and flexibility; and better alignment of UCOP and campus goals.

1. Alignment of UCOP and campus goals

UCOP and campus leaders believe UC is a world renowned research university because it is more than the sum of its parts. Yet, the systemwide office charged with leading the diverse UC locations together toward a common goal appears to lack a well-developed vision, mission or set of objectives for basing decisions or guiding the campuses. The tremendous value of the collective strength of the UC system is clear to all those interviewed, yet campuses acknowledge that pressures to splinter are greater than ever. These campus leaders convey a need for the UC system's next President to clearly articulate the vision and strategic mission of the University, while enabling campus individuality and flexibility.

While UCOP's roles remain unclear to many, some feel this is understandable given the tremendous sea change that has impacted the UC system over the past several years, including budget shortfalls, leadership turnover and political struggles. During times of transition, campuses understand that the often apparent lack of clarity around roles and governance. However, for UCOP and the campuses to work well together, UC Merced and UC Davis believe that clarity of roles is critical.

2. Coordination between UCOP departments

The campus interviews revealed some conflicting issues. There were concerns around receiving duplicate information and briefings, while also indicating that communication was sometimes lacking. Both UCOP and campus leaders perceive a lack of coordination on requests to campuses, meetings and communications within UCOP as a significant problem. They indicated that multiple UCOP departments often send requests to different campus units for similar information, conveying that UCOP is not coordinating internally. This results in confusion and duplication of effort that is inefficient, costly and erodes trust. Campuses also cited redundant communication on the same topic, such as budget updates to VCAs, VCPBs and others. At the same time, there were concerns that one group might be briefed on a specific topic, but not share the update with campus colleagues, or that the parallel briefings were not concurrent and some groups benefitted by hearing the information first. This concern seemed to resonate with both Chancellors. At UC Merced, where stakeholders handle multiple scopes, the same person often attends two similar meetings, with much information being repetitive.

The Collaborative queried UCOP divisions to compile a list of recurring calls/meetings to better comprehend the outgoing communications from UCOP, and cross collaboration among campuses. UCOP convenes approximately 284 separate, recurring, functionally-based calls/meetings in an effort to facilitate communication around systemwide issues (Appendix F). This may be information overload, when effective communication was intended.

Leaders from UC Merced and UC Davis value functionally based meetings. However, as noted above, they acknowledge that information is frequently presented and discussed by UCOP in multiple venues to multiple stakeholders, resulting in repetition and inconsistent interpretation. Some observed that periodic updates may be more effectively delivered via conference calls than in-person meetings. One campus suggests a regularly scheduled UCOP call where all systemwide updates are discussed and campus leadership decides which staff from their campus will participate in portions of the call. These could also be filmed and available for on-line viewing. Others recommend that in-person meetings be coordinated, scheduled, and combined with similar meetings, with specialized break-out sessions as needed. For systemwide committees and workgroups, UC Merced suggested leveraging a single subcommittee or representative to report to the larger committee, rather than asking multiple subgroup members to also participate on the larger committee.

UC Merced suggests the creation of a campus-focused liaison role at UCOP to facilitate consolidation of duplicate requests and track systemwide meeting requests and communications, with the intent of reducing inefficiencies and inconsistencies. However, UC Davis believes that no one person at the campus level or UCOP can fully absorb or communicate all that is happening across the campus, and

creating these positions may be inefficient and expensive. Both campuses supported an exchange program or job share function between UCOP and the campuses to help each entity better understand each other and better coordinate requests, meetings and communications. UCOP and campus leaders believe in-person meetings improve relationship-building and collaborative opportunities. Campuses encourage UCOP leaders and staff to spend time on campus engaging with staff, students and faculty addressing systemwide issues, to improve communication and coordination. Consideration might be given to creating options for campuses and UCOP to gain insight on the needs and priorities of each other, and advance and strengthen these relationships.

3. Policy flexibility and clarity

UCOP and campus leaders believe campuses need flexibility to meet their specific unique situations. Campuses would like flexibility in systemwide policy development and implementation when possible. Campuses indicated that flexibility is needed in areas such as budgeting, capital planning, staff personnel programs, research administration, and more, to meet established goals in support of the UC mission. The appetite for risk tolerance often differs among the campuses. As systemwide policies are developed, UC Merced and UC Davis feel that UCOP should determine if systemwide policies/practices are too risk-averse or create an unnecessary burden for campuses trying to grow in creative ways. *(Note: the policy update initiative begun in 2010 encourages differentiation between policy requirements versus procedures and guidelines)*

Campuses voiced concern that systemwide policies are being developed without clearly communicated governance structures and processes or campus consultation. Governance structures should ensure that policies in development or review are aligned well (and simply) with related policies, and that the requirements and governance structure are easily interpreted to encourage compliance.

Recommendations

Our Coro challenge was complex, and the diversity of the UC campuses further challenges development of global recommendations. Still, the Collaborative is advancing three recommendations: Develop and Articulate a Clear Strategic Plan for UCOP; Improve Collaboration and Coordination; Provide Clarification on Policy Process and Governance.

Develop and Articulate a Clear Strategic Plan for UCOP

The University of California, its ten campuses, five medical centers, national labs and agricultural and natural resource operations is an enormous and complex organization. We recommend development and articulation of a clear strategic plan for UCOP to serve as the foundation and direction for the system. This will require a concerted, inclusive, and consultative process with campus collaboration and UCOP leadership. It can clarify UCOP functions, roles, and priorities, while exploring new approaches and ideas for broad benefit. Specific recommendations suggested below may help guide development of this strategic plan, and engage essential stakeholders. Some of the groundwork already exists. The imminent presidential transition reinforces the timeliness of this opportunity.

Revisit the Monitor Report

In 2007, the Regents and the President commissioned the Monitor Group to assess UCOP's finance and administration organization and operations. The Monitor Report (January 2008) <http://www.universityofcalifornia.edu/future/monitor0907.pdf> addressed UCOP's mission and role. A subset of these recommendations may warrant revisiting to enhance communications and collaboration. This is an ideal time for that review, in light of the incoming president and an upturn in the fiscal situation. We propose that several issues, as excerpted below, be re-examined with updated recommendations:

- *Performance management systems with clearer authority, communications of expectations and results*
- *Two-way accountability systems between the campuses to the president and the Regents; and UCOP accountability to the campuses for quality and effectiveness.*
- *Improved communication between the campuses and UCOP with two-way flow to create a truly consultative management practice*
- *Continued clarity in the high level roles of the Regents, President, and the Chancellors to enhance effectiveness of each, and assist in two-way communications between campuses and UCOP*

A small diverse workgroup could revisit the key recommendations and devise an updated set of recommendations, some of which could be included in the strategic planning effort outlined below.

Convene a Congress

Another approach would be to convene a diverse congress with the specific charge to develop a strategic plan for UCOP, with additional tasks to develop improved communications. The congress should be designed to achieve greater stakeholder engagement and could chart a course to achieve system-wide goals.

A suggested structure would be a two-day congress that could coincide with the new UC Presidency. This should have an initiative-based agenda, emphasizing interactive communication between delegates and conveners. It would benefit from smaller breakout sessions with clear, realistic objectives, structured by interesting and well-formulated

questions and facilitators. The dynamic information exchange should result in a fruitful brainstorming activity, perhaps also leading to new ideas.

UCOP Divisional Summits

Tremendous opportunities exist for colleagues throughout the system to learn and share best practices with each other and UCOP. Many of these interactions occur at a departmental or functional level. However, if UCOP divisions were encouraged to bring together similar campus organizations on a regular basis it would serve in building relationships and enhancing communication. These summits could reexamine options to clarify, enhance, strengthen, or simplify roles/responsibilities for UCOP. These ideas can also be shared with the new President and the congress described above.

The work products from the Monitor Report review, congress, and divisional summits can be compiled into a final report. The open process, generation of ideas, and preparation of the final report will be useful for the UCOP leadership team, especially at this transition time.

Successful implementation would be evidenced by completion, distribution and implementation of a UCOP Strategic Plan that clearly defines the roles, goals and objectives for UCOP communications and collaboration with campuses.

Improve Collaboration and Coordination

The University of California (UC) is a complex organization with a culture of collaboration and inclusion. The complexity and size make it challenging to ensure stakeholders are included in informational communications and the wide variety of decisions. There are innumerable meetings across the system, sometimes with the same stakeholders, and often with similar and interdependent issues and initiatives. Campuses both praised the benefit of these meetings and disparaged over their number. The Collaborative compiled information on systemwide meetings (Appendix F). The sheer volume of calls and meetings reflect the overload of information critical to the complexity of ongoing UC operations and demonstrate the need for a tool to simplify and clarify ongoing exchanges. To improve collaboration and coordination we recommend:

- UCOP take the lead in improving communications processes and effectiveness, by
 - Diversifying the membership of PAG (President's Advisory Group) to enhance awareness of campus perspective and better disseminate information
 - Lead by example in developing interdisciplinary teams at UCOP, and reducing silos
- Develop a program for personnel exchange between UCOP and campuses to diversify expertise and understanding of both UCOP staff as well as campus staff
- Invest in technology to increase effectiveness of communications, meetings

The Collaborative believes the highest priority for improving communications is for UCOP to model improved collaboration and communication among UCOP divisions, departments, and individual staff members. Because the majority of systemwide meetings originate at UCOP, our meeting organizers should be encouraged to ensure they run meaningful and effective meetings. This would be an example in leading the improvement of communication and relationships. Other means to improve these areas include:

- Encourage early and meaningful campus involvement when developing initiatives
- Look to campuses for best practices, and share best practices with other campuses
- Provide notice and sufficient background information when seeking feedback
- Ensure sufficient staff support for follow-through and implementation of initiatives

Successful implementation of UCOP leading the way in improved communications and collaboration would be evidenced by:

- Development of an workgroup with a charter, an implementation plan, and communicating this throughout UCOP and campuses
- Creating and using a master calendar for systemwide meetings
- Effective cross-divisional meeting coordination and effective meetings
 - Creating a training campaign for UCOP systemwide meeting organizers
 - Stating the purpose of each meeting in the invitation
 - Inviting the right people, striving for the right number of stakeholders who can contribute without involving too many people
 - Sending preparatory materials/drafts to participants prior to the meeting
 - Sending an agenda in advance with clearly identified topics and types and actions using the Outcomes, Agenda, Roles and Rules framework (OARRs see Appendix C); with action and follow-up items clearly defined and communicated at the end of meetings
- Annual review of the communication workgroup progress, purpose, and membership

Provide Clarification on Policy Process and Governance

UCOP should continue efforts to update and streamline policies, with clear communication to stakeholders and collaborative inclusion in the process. The Collaborative notes that UCOP's Ethics Compliance and Audit Services office (ECAS) has recently been updating UC policies, focusing on ownership and accountability, consistent formatting, differentiating between mandatory and discretionary language, and identifying areas for review and revision. A number of campus policy stakeholders have been involved in this ongoing project, but all campus constituencies may not be aware of this effort.

The Collaborative recommends:

- Ongoing UCOP governance process for creation and review of policies be communicated more widely and regularly to all campus constituencies.
- UCOP should consistently encourage campus input early in the policy process and develop consistent ways to socialize policies under review in time for thoughtful contributions.
- As policies are revised or introduced, minimize unnecessary constraints on campuses. Policies should clearly articulate mandatory elements and guidelines/best practices, including when/how exceptions might be permitted.

A successful implementation of this recommendation would be evidenced by:

- Broad communication of clear, simple guidelines on the factors that trigger the need for a policy, who initiates the process, and the protocols for development and review.
- Broad communication of the timeline for review of existing policies. The plan/timeline should be updated on a regular basis, perhaps annually.
- Accessible information on policies under development or review.
- A growing body of policies with consistent format, clear indication of mandatory elements (and cited authority) vs. implementation guidance, and process indicating when/how exceptions may be considered.

Conclusion

Effective communication and strong relationships between UCOP and the campuses are essential for UC to maintain our position as the leading University system in the nation and the world. The challenge for the inaugural UCOP-Coro Collaborative was to identify how UCOP may become more effective in communications and relationships between the Office of the President and the campuses. Through inquiry with campus leaders at UCOP, UC Merced and UC Davis, we heard different perspectives, yet similar themes. UCOP should endeavor to:

- Internally coordinate our efforts as we work with campus stakeholders across multiple functional areas
- Provide clear and consistent communications
- Improve policy clarity and consistency; differentiate between mandatory clauses and procedures/guidelines; provide flexibility where possible
- Articulate UCOP roles and objectives
- Match UCOP behaviors to the defined goals and objectives and
- Involve campus stakeholders in systemwide decision-making in an early and meaningful way

While effective communications and relationships between UCOP and the campuses are a shared responsibility, we believe UCOP can and should take the first step. This report outlines several specific and actionable recommendations that UCOP can take to make significant improvements. We urge UCOP leaders to designate an executive sponsor to spearhead and implement these recommendations, support these recommendations and allocate appropriate resources toward further development and implementation.

Our inaugural UCOP-CORO Collaborative has benefited from this leadership opportunity. We valued the exercises, the networking, and the interdisciplinary roster that provided insight across many UC operations. All thirteen of us would like to express our continued commitment and support to UCOP leadership to effect positive change at UCOP and beyond. Please do not hesitate to call on any or all of us from the 2012/13 UCOP Coro Collaborative, if we can be of assistance in achieving this important objective.

Appendix A
2012/13 UCOP Coro Collaborative



Michael Baptista
Executive Director, Benefits
Programs & Strategies Human
Resources

*What Coro means to me:
"The Coro Leadership program has provided me with a rich opportunity to collaborate with colleagues within Office of the President that given the normal course of my work I would have missed the occasion to engage."*



Shirley Bittlingmeier
Client Services Officer
Information Technology Services

*What Coro means to me:
"The recognition of the significant investment UCOP leadership has made to strengthen our leadership capabilities and form strong collaborative relationships across OP and UC. I am honored to have participated in such a distinguished program and look forward to working more closely with my Coro colleagues."*



Garen Corbett
Director
Health Sciences

*What Coro means to me:
"Coro has been an opportunity for growth and collaboration with extraordinary colleagues, and it has enhanced my personal management toolkit. I think the investment will pay dividends in my work, and enhance my ability to lead and contribute to UC."*



Grace M. Crickette
Chief Risk Officer
Finance Division–Risk Services

*What Coro means to me:
"The greatest 'tool' I obtained in Coro was strengthening my existing relationships and developing new relationships. Finding the right people is key to being a successful leader and creating success throughout the organization. I want to share what I've learned with my Risk Services team so they can benefit from the concepts and tools and can, in turn, develop as leaders."*



Jenny Kao
Executive Director
Issues Management, Policy
Analysis & Coordination (IMPAC)

*What Coro means to me:
"Coro has opened my eyes. True leadership is defined by the leader, not by a book or a business manual or a set of guidelines. For me, true leadership is simultaneously pushing myself beyond my comfort zone while remaining authentic to who I am at my core when I am my best self, enabling those around me to also shine as leaders."*



Patricia Osorio-O'Dea
Deputy to the Vice Provost
Academic Planning, Programs
and Coordination

*What Coro means to me:
"Coro has given me the opportunity to delve deep into leadership issues, questions, and challenges, while providing me tools that can that I can use to make positive changes at UCOP and beyond. Through Coro I've been able to establish new relationships with OP colleagues and strengthen old relationships through this shared leadership experience."*



Luanna Putney
Director of Research Compliance
Office of Ethics, Compliance and
Audit Services

*What Coro means to me:
"CORO gives arms, legs and expression to the Leadership concept -- making her dance and sing in a way that is unforgettable."*



Donna M. Salvo
Executive Director, Systemwide
Talent Management and Staff
Development Human Resources

*What Coro means to me:
"As someone very new to UC and UCOP, Coro as a highly respected program has allowed me to build lifelong relationships and partnerships which will allow me to become an effective leader in UC."*



Greta Schnetzler
Deputy Campus Counsel, UCSF
Department

*What Coro means to me:
"As someone situated on a campus, the best thing about the UC-CORO Collaborative has been the opportunity to establish close working relationships with my colleagues at OP. CORO provides the structure and tools for becoming an impactful leader and lets participants practice those tools in a safe environment."*



Jason Simon
Executive Director, Marketing
Communications — External
Relations

*What Coro means to me:
"The Coro program has been a great reminder of the need to nurture and hone leadership skills but, more importantly, it's been a chance to understand more about the UC system, how colleagues throughout the organization make it better daily, and effective ways we can inspire and lead."*



Wendy Streitz
Executive Director
Research Policy Analysis &
Coordination, ORGS

*What Coro means to me:
"Coro has certainly given me new tools and has reinforced old ones. Perhaps more importantly, I find myself part of a group of thoughtful and committed colleagues to whom I can turn with confidence as we struggle with our various leadership challenges."*



Nancy Tanaka
Executive Director & Deputy
Officer
Academic Personnel

*What Coro means to me:
"CORO has provided an opportunity
to develop valuable relationships
with colleagues across divisional
lines. These collaborative
relationships will serve to strengthen
and facilitate the important work at
the Office of the President. CORO
has introduced leadership paradigms
which have given me the opportunity
to refine my leadership role and
develop new management tools."*



Deborah Wylie
Associate Vice President
Capital Resources Management

*What Coro means to me:
"The Coro program is valuable for
many reasons: interdisciplinary
camaraderie, experiential exercises,
and self-assessment. I really value
the time we've spent with senior
leadership discussing their views of
leadership and their paths to the
University of California."*

Appendix B

List of Participants at Campus Visits

UC Merced Visit #1, November 20, 2012:

Dorothy Leland, Chancellor
Mark Aldenderfer, Dean, School of Social Sciences, Arts and Humanities
Annette Garcia, Assistant Chancellor and Chief of Staff
Dan Hirleman, Dean, School of Engineering
Kyle Hoffman, Vice Chancellor, Development and Alumni Relation
Jane Lawrence, Vice Chancellor, Student Services
Juan Meza, Dean, School of Natural Sciences
Mary Miller, Vice Chancellor, Administration
Tom Peterson, Executive Vice Chancellor and Provost
Sam Traina, Vice Chancellor, Research
Janet Young, Associate Chancellor and Special Advisor to the Chancellor

UC Merced Visit #2, February 20, 2013:

Mary Miller, Vice Chancellor, Administration
Tom Lollini, Associate Vice Chancellor, Campus Architect
Monir Ahmed, Asst. Vice Chancellor – Business and Financial Services
Kyle Hoffman, Vice Chancellor for Development and Alumni Relations
Lisa Pollard, Executive Director, Development Services
Shannon Runyon, Management Services Officer –Development and Alumni Relations
Michael Thompson, Asst. Vice Chancellor for Enrollment Management
Diana Ralls, Director of Student Financial Aid
Charles Nies, Associate Vice Chancellor for Student Affairs
Rachael Martin, Graduate Student Services Coordinator
Brian Gresham, Director of Administrative Operations & Financial Planning for Student Affairs

UC Davis Visit, March 12, 2013:

Ken Burtis, Faculty Advisor to the Chancellor/Provost
Matt Carmichael, Chief, University Police Department
Adela de la Torre, Interim Vice Chancellor-Student Affairs
Karl Engelbach, Associate Chancellor/Chief of Staff
Jeffery Gibeling, Dean-Graduate Studies
Susan Gilbert, Associate Vice Chancellor-Human Resources
Ralph Hexter, Provost and Executive Vice Chancellor
Shaun Keister, Vice Chancellor Development & Alumni Relation
William Lacy, Vice Provost-University Outreach & International Programs
Jeremiah (Jer) Maher, Director, Internal Audit Services
John Meyer, Vice Chancellor-Administrative and Resource Management
Karl Mohr, Assistant Executive Vice Chancellor
Claudia Morain, Interim Exec. Director of Strategic Communications
Tom Nesbitt, Associate Vice Chancellor-Human Health Sciences
Kelly Ratliff, Associate Vice Chancellor-Budget & Institutional Analysis
Rahim Reed, Associate Executive Vice Chancellor-Campus Community Relations

Appendix C
OARRS Meeting Guidelines

OARRS

O	OUTCOMES	What do you need to accomplish during your time together
		Where do you want your group to be by the end of the meeting?
		What are the specific items that you need to get done?
		What do we mean bty outcomes?
		Specific, concrete, and measurable!
A	AGENDA	What steps do we need to take to get there?
		Is there a particular order that we need?
		Do we need to do some things first before we can do other things?
		What is the estimated time that we need to do the item?
		What is the plan/process we need to address the outcomes?
R	ROLES	Who will do what?
		Examples
		Facilitator-person who focuses the group
		Recorder- someone to keep track of what gets said or improtant decisions
		Timekeeper-someone to keep the group on the set time-limits
Participants-these are people who drive the meeting with great ideas		
R	RULES	What boundaries or guidelines will govern our interaction?
		Examples
		All participate
		No one dominates
		Minimize side conversations

Appendix D Start-Stop-Continue Exercise

Overview - The *Start/Stop/Continue* exercise is used for a variety of purposes related to individual, team and organizational development. This approach is effective in generating respectful, honest and meaningful communication as well as tangible action, and facilitates a balanced discussion of areas of strength and areas of improvement.

Instructions -Take some time to think about the campus and the UCOP representatives with whom you will be having this conversation. Take into consideration communication styles as you reflect on talking with this team about the following three questions in the worksheet.

1. List one or two things that would be beneficial for this team to **START** doing to increase effectiveness.
2. List one or two things that this team is currently doing that are not working well for you and should **STOP** doing them.
3. List one or two things this team is currently doing that she/he/we should **CONTINUE** to do because those things are serving us well.

START	List one or two things that would be beneficial for this person or team to START doing to increase her/his/our effectiveness. One idea per post-it note.
STOP	List one or two things that this person or team is currently doing that are not working to achieve positive results, and should STOP doing them. One idea per post-it note.
CONTINUE	List one or two things that this person or team is currently doing well that she/he/we should CONTINUE doing. One idea per post-it note.

EXPLANATORY NOTE

This is one of the most basic yet effective tools to use with teams and individuals. It is effective because it has application in either high performing teams (where the process is used in a continuous improvement context) or between individuals in conflict (where emotions tend to run high).

The power of the process is that it demands specific behaviors, ideas, or examples to be used to communicate the perspective of the individual. In responding to the questions, it ultimately demands that the responder be more balanced in perspective and provide feedback that is based on behavior rather than emotion, or on solution rather than problem. What the Start/Stop/Continue approach does best is that it compels participants to identify their concerns, their expectation of change, and the solutions that they can support. This takes participants beyond the emotion of the here and now, bringing objectivity into the process. This interactive orientation makes the outcomes from the investment of time far more productive because the focus is on solution and the re-establishment of operating guidelines and behavioral boundaries.

Appendix E

Communication Best Practices in Higher Education and Private Industry

Employee/organizational communications is a complex process that is vital to most organizations, as well as our organizational success. Yet, for researchers and managers, the greatest continuing area of weakness in management practice is the human dimension. In good times or bad, there seems to be little real understanding of the relationships between managers, among employees, and interactions between the two. When there are problems, everyone acknowledges that the cause often is a *communication problem*. (Jim Lukazewski, 2006)

Most experts on organizations, management and leadership, assert that effective communications is the foundation for effectiveness in any type of organization. They assert there can't be too much communication. Some leaders misinterpret communications to be the same as paperwork or bureaucracy and so they're averse to a high degree of communications. As leaders and managers mature, they realize the need to effectively convey and receive information, and efforts at communications (internal and external) increase substantially.

As part of the UCOP-CORO Leadership Challenge, we reviewed internal communication channels within the UC system and across other institutions of higher education and industry. At University of California Office of the President (UCOP), the UC campuses, and between UCOP and the campuses we found that there was no single and effective method or system for communicating to employees internally. From an initial internal communication needs analysis, the following limitations were recognized:

- Heavy reliance on email as the primary communication channel
- Limited use of channels to effectively deliver key messages
- No consistency in management of project communication within the UC system
- No archiving process/policy for communications
- Challenges in working outside of immediate departments and divisions

These limitations pose a significant business risk and an overall threat to the ongoing effectiveness of internal communication and collaboration at UCOP. The following objectives should be considered during the planning and execution of any new UC internal communication framework:

- Streamline and effectively manage and archive internal communications, including email, event invites, surveys, project communications, etc.
- Deliver effective internal communications with the highest achievable impact and lowest possible disturbance
- Effectively track, measure and report on internal communications
- Provide multiple channels to effectively deliver messages
- Allow for measurement of employee responsiveness to communications
- Reduce distraction and costs due to email overload

Over the past few weeks we researched internal communication procedures and software tools that may be used to improve the correspondence within and between the campuses and UC Office of the President. The initial step in applying a successful communication plan is to describe the scope and purpose of implementing such a plan. We found communication plan/strategy templates from preeminent higher education institutions (private and public). The templates from the higher education institutions include examples from Yale and University of Minnesota. These templates emphasize the importance of defining the goals/objects of the plan, recognizing the audience for whom the plan is targeted ,

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addressing strategies for how to use new communication software, assessing budgetary requirements, and figuring out how you know if the plan was successful.

In addition to researching communication plan/strategy templates from the higher education sector; we also found examples of software tools from businesses with less than 500 employees as well as those with more than 500 employees that UC should consider enhancing efficient and robust internal communication:

Yammer is an Enterprise Social Network that brings together employees, content, conversations, and business data in a single location. Employees can create groups to collaborate on projects and share and edit documents. The service can be accessed through the web, desktop, and mobile devices including iPhone, iPad, Windows Phone, Android, and Blackberry, enabling a “virtual office” that employees can plug into while on-the-go. Additionally, Yammer can be easily integrated with other systems such as Microsoft SharePoint, creating a social layer across all enterprise applications. More than 5 million users, including employees from 85 percent of the Fortune 500, have adopted Yammer’s Software-as-a-Service solution.

SnapComms provides software channels for enterprise internal communications. There are six channels available to administrators which can be used to meet distinctly different communication needs and purposes. Channels include; Desktop Alerts, Scrolling News Ticker, User Generated Internal Newsletters, Screensaver Messaging, and Internal Social Media channels. These channels can be grouped into three general application types. Each application type has specific properties that define a) the level of impact communications have on users, b) on screen display characteristics and c) the level of user interactivity. A range of moderation and reporting functions are available which provide organizations with visibility, and if necessary control, over how their staff use the tools. Users of SnapComms include: Elite Customer Solutions, Cox Communications, Virgin Mobile, and more.

Pricing for software tools depends on the number of users and features a company feels necessary for successful communication. UC should find out how protected the user data is before a software tool is implemented throughout the system. The templates and case studies provide good benchmarks on how to articulate the goals and strategies of an efficient communication plan.

References

[Lukaszewski, J. \(2006\). Rethinking employee communication: A strategic analysis. No. 5. JimLukaszewski Strategy.](#)

SnapComms Home: <http://www.snapcomms.com/>

SnapComms Demo: <http://www.snapcomms.com/demorequest.aspx>

Yammer Home: <https://www.yammer.com/>

Yammer Demo: <http://techcrunch.com/2012/06/15/from-the-archives-watch-yammers-first-public-demo-and-launch-at-tc50/>

Appendix F List of Systemwide Meetings

Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Business Operations	Budget and Capital Resources	Campus Budget Directors	Campus Budget Directors	Conference Call	Semi-annually	2
Business Operations	Budget and Capital Resources	Campus Budget Directors	Campus Budget Directors	In-person	Annually	1
Business Operations	Budget and Capital Resources	Joint Meeting - EVC's and VCPBs	Campus Executive Vice Chancellors and Vice Chancellors for Planning and Budget	In-person	Quarterly	4
Business Operations	Budget and Capital Resources	Vice Chancellors for Planning and Budget	Vice Chancellors for Planning and Budget	Conference Call	Bi-weekly	25
Business Operations	Budget and Capital Resources	Vice Chancellors for Planning and Budget	Vice Chancellors for Planning and Budget	In-person	Bi-monthly	6
Business Operations	Budget and Capital Resources	Campus Architects Call	Campus Architects	Teleconference	Monthly	12
Business Operations	Budget and Capital Resources	Campus Architects Meeting	Campus Architects	In-person	Semi-annually	2
Business Operations	Budget and Capital Resources	Capital Planning Directors Call	Capital Planning Directors	Teleconference	Monthly	12
Business Operations	Budget and Capital Resources	Capital Planning Directors Meeting	Capital Planning Directors	In-person	Semi-annually	2
Business Operations	Budget and Capital Resources	Capital Programs Institute	Any campus staff involved with Capital Programs (provides more than 1,000 man-days of training per year)	In-person	Monthly	12
Business Operations	Budget and Capital Resources	CHESC Annual Conference (California Higher Education Sustainability Conference)	Over 1,000 attendees from UC, CSU, CCC and private institutions, approximately 25% students	In-person	Annually	1
Business Operations	Budget and Capital Resources	Climate Change Working Group	Sustainability Directors; Environmental Managers; planning staff; facilities staff	Teleconference	Monthly	12
Business Operations	Budget and Capital Resources	Contract Administrators Workshop	Contract Administrators	In-person	Annually	1
Business Operations	Budget and Capital Resources	Dialogue Newsletter	Distributed to 700 campus staff each issue	E-mail distribution	Bi-monthly	6
Business Operations	Budget and Capital Resources	Green Building Working Group	Campus Architects; Project Managers; Planners; Sustainability Directors	Teleconference	Monthly	12
Business Operations	Budget and Capital Resources	High Interest Project Calls	Campus Planning & Design staff (one campus per call)	Teleconference	Monthly	12
Business Operations	Budget and Capital Resources	Medical Center Sustainability Contacts	Med Center sustainability contacts (faculty; facilities directors; sustainability managers; nutrition and foodservice directors; environmental services directors)	Teleconference	Quarterly	4

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Business Operations	Budget and Capital Resources	Physical and Environmental Planners	Physical and Environmental Planners	Teleconference	Bi-monthly	6
Business Operations	Budget and Capital Resources	Solid Waste and Recycling Working Group	Recycling coordinators and sustainability staff	Teleconference	Monthly	12
Business Operations	Budget and Capital Resources	Sustainability Directors Call	Sustainability Directors (and other sustainability staff)	Teleconference	Monthly	12
Business Operations	Budget and Capital Resources	Sustainability Steering Committee	VC Administration or AVC/Campus Architects	In-person	Annually	1
Business Operations	Budget and Capital Resources	Sustainable Foodservice Working Group	Dining Services Directors; Student Center Dining/Business Operations Directors; Med Center Nutrition and Foodservice Directors; procurement staff; real estate staff; sustainability staff	Teleconference	Bi-monthly	6
Business Operations	Budget and Capital Resources	Sustainable Operations (LEED EBOM) Working Group	Facilities, sustainability, and planning staff	Teleconference	Monthly	12
Business Operations	Budget and Capital Resources	Sustainable Purchasing Working Group	Procurement staff and sustainability staff	Teleconference	Quarterly	4
Business Operations	Budget and Capital Resources	Sustainable Transportation Working Group	Transportation directors, alternative transportation coordinators, fleet representatives	Teleconference	Monthly	12
Business Operations	Budget and Capital Resources	Sustainable Water Systems Working Group	Facilities, sustainability, planning staff, and EH&S staff	Teleconference	Monthly	12
Business Operations	Budget and Capital Resources	Systemwide Sustainability Contacts	Sustainability staff and chairs of Chancellor's Sustainability Committees	Teleconference	Monthly	12
Business Operations	Budget and Capital Resources	Task Force on Reporting on Socially Responsible Investing	Deputy Treasurer; CFO of UCSD Foundation; select faculty; sustainability staff	Teleconference	Monthly	12
Business Operations	Budget and Capital Resources	Task Force on Reporting on Sustainability Education and Research	Faculty; academic coordination staff; sustainability staff	Teleconference	Monthly	12
Business Operations	Human Resources	AA/EEO Officer Mtg	AA/EEO Officer from campuses/med centers	In-person	Quarterly	4
Business Operations	Human Resources	Benefits Managers Mtg	Benefits Managers from campuses/med centers	Conference Call	Monthly	12
Business Operations	Human Resources	Benefits Managers Mtg	Benefits Managers from campuses/med centers	In-person	Semi-annually	2
Business Operations	Human Resources	CHRO Meeting	Chief Human Resources Officers from campuses/med centers	Conference Call	Monthly	12
Business Operations	Human Resources	CHRO Meeting	Chief Human Resources Officers from campuses/med centers	In-person	Quarterly	4
Business Operations	Human Resources	Compensation Managers Mtg	Compensation Managers from campuses/med centers	In-person	Quarterly	4
Business Operations	Human Resources	Council of UC Staff Assemblies (CUCSA)	Staff Assembly members from campuses/med centers	In-person	Quarterly	4

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Business Operations	Human Resources	Employment Managers Mtg.	Employment Managers from Campus/Med Centers/Lab	Conference Call	Monthly	12
Business Operations	Human Resources	Employment Managers Mtg.	Employment Managers from Campus/Med Centers/Lab	In-person	Semi-annually	2
Business Operations	Human Resources	Fall Benefits Training	Training for all Benefits Managers/Reps on the changes to H&W programs	In-person	Annually	1
Business Operations	Human Resources	Health Care Facilitators	HCFs from campuses/med centers to provide updates and clarification on detailed health benefits issues	Conference Call	Monthly	12
Business Operations	Human Resources	Labor Relations Managers Mtg	Labor Relations Managers from campuses/med centers	In-person	Bi-monthly	6
Business Operations	Human Resources	Talent Management	Designated group of Training Directors, Employment Managers, AA/EEO Officers discuss Design system-wide TM programs.	Conference Call	Monthly	12
Business Operations	Human Resources	Talent Management	Designated group of Training Directors, Employment Managers, AA/EEO Officers discuss Design system-wide TM programs.	In-person	Semi-annually	2
Business Operations	Human Resources	UCRS Advisory Board Mtg	Elected and designated board members and HR staff meet to discuss issues concerning retirement programs	In-person	Quarterly	4
Business Operations	Human Resources	Wellness coordinators	Wellness coordinators from campuses/med centers to provide updates and clarification on wellness plans and initiatives	Conference Call	Monthly	12
Business Operations	Human Resources	Health Care Task Force (HCTF)	Faculty and HR staff meet to discuss issues concerning Health & Welfare programs	In-person	Bi-monthly	6
Business Operations	Human Resources	Task Force on Investment and Retirement (TFIR)	Faculty and HR staff meet to discuss issues concerning retirement programs	In-person	Bi-monthly	6
Business Operations	Human Resources	Disability Management professionals	Disability Management/Voc Rehab people from campuses/med centers to provide updates and clarification on detailed disability benefits issues	Conference Call	Monthly	12
Business Operations	Information Technology Services	Information Technology Leadership Council (ITLC)	Most Campus CIOs	Conference Call	Monthly	12
Business Operations	Information Technology Services	Information Technology Leadership Council (ITLC)	Most Campus CIOs	In-person	Semi-annually	2
Business Operations	Information Technology Services	Information Technology Policy and Security	Policy and Information Security staff	Conference Call	Monthly	12

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Business Operations	Information Technology Services	UC IT Policy Group	Campus Policy staff	Conference Call	Monthly	12
Business Operations	Information Technology Services	Web Accessibility Resources Group	Named campus representatives (by the CIO) and functional area representatives	Conference Call	Bi-monthly	6
Business Operations	Information Technology Services	UC Records Management Committee	Records Manager from each campus, LBNL, ANR and OGC	Conference Call	Monthly	12
Ethics, Compliance and Audit Services		Campus Ethics and Compliance Officers (CECO) Meeting	CECOs from all UC locations	Conference Call	Monthly	12
Ethics, Compliance and Audit Services		Campus Ethics and Compliance Officers (CECO) Meeting	CECOs from all UC locations	In-person	Semi-annually	2
Ethics, Compliance and Audit Services		Campus Policy Managers	Campus Administrative Policy Managers	Conference Call	Monthly	12
Ethics, Compliance and Audit Services		Chief Health Sciences Compliance and Privacy Officers	Chief Health Sciences Compliance and Privacy Officers from AMCs	Conference Call	Monthly	12
Ethics, Compliance and Audit Services		Chief Health Sciences Compliance and Privacy Officers	Chief Health Sciences Compliance and Privacy Officers from AMCs	In-person	Semi-annually	2
Ethics, Compliance and Audit Services		Export Control Workgroup	Export control administrators from each UC location	Conference Call	Monthly	12
Ethics, Compliance and Audit Services		Health Sciences Internal Auditors	Health sciences internal auditors from all UC locations	Conference Call	Bi-monthly	6
Ethics, Compliance and Audit Services		Internal Audit Directors (IADs)	IADs from all UC locations	Conference Call	Monthly	12
Ethics, Compliance and Audit Services		Internal Audit Directors (IADs)	IADs from all UC locations	In-person	Quarterly	4
Ethics, Compliance and Audit Services		IT Internal Auditors	IT internal auditors from all UC locations	Conference Call	Quarterly	4
Ethics, Compliance and Audit Services		MDaudit Workgroup	MDaudit users from UC Medical Centers	Conference Call	Quarterly	4

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Ethics, Compliance and Audit Services		Medical Billing Advisory Group (MBAG)	Compliance and Privacy Officers, Medical Physicians, Compliance Directors, Research Compliance at the 5 Medical Centers	Conference Call	Bi-monthly	6
Ethics, Compliance and Audit Services		Research Compliance Advisory Committee (RCAC)	AVCs of Research and/or Research Compliance Directors at all UC locations	Conference Call	Monthly	12
Ethics, Compliance and Audit Services		TeamMate (internal audit management system) Super Users	Designated TeamMate Super Users from all UC locations	Conference Call	Monthly	12
External Relations	Alumni & Constituent Affairs	Alumni Association of the UC (AAUC)	4 alumni Regents; campus Alumni Board pres; campus Alumni Staff Dirs	In-person	Tri-annually	3
External Relations	Alumni & Constituent Affairs	UC Advancement Data Managers	Donor/constituent/alumni/parent database managers from campuses, OP personnel	Conference Call	Semi-annually	2
External Relations	Alumni & Constituent Affairs	UC Advancement Data Managers	Donor/constituent/alumni/parent database managers from campuses, OP personnel	In-person	Semi-annually	2
External Relations	Alumni & Constituent Affairs	UC in Washington, D.C., Leadership Group	DC-based volunteer leaders from each campus	In-person	Annually	1
External Relations	Communications	Communications AVP and News Directors	Systemwide VP/AVP of Communications and key news directors of 10 campuses, medical centers, ANR, and other large enterprises. Generally talk about media and issues management topics that are primarily systemwide in nature and update from/for Regents and President.	Conference Call	Monthly	12
External Relations	Communications	Communications AVP and News Directors	Systemwide VP/AVP of Communications and key news directors of 10 campuses, medical centers, ANR, and other large enterprises. Generally talk about media and issues management topics that are primarily systemwide in nature and update from/for Regents and President.	In-person	Annually	1
External Relations	Communications	Marketing Communications Directors	AVP/VP of Communications and marketing directors from campus, med center level and also includes marketing contacts from admissions/student affairs and other programs throughout the system.	Conference Call	Monthly	12

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
External Relations	Communications	Marketing Communications Directors	AVP/VP of Communications and marketing directors from campus, med center level and also includes marketing contacts from admissions/student affairs and other programs throughout the system.	In-person	Annually	1
External Relations	Federal Governmental Relations (FGR)	Federal governmental relations directors (GRDs)	Campus federal GRDs, OP personnel	Conference Call	Bi-weekly	25
External Relations	Federal Governmental Relations (FGR)	Federal governmental relations directors (GRDs)	Campus federal GRDs, OP personnel	In-person	Annually	1
External Relations	Institutional Advancement	Associate Vice Chancellors for Development (AVCD)	Campus AVCs for development, OP personnel	In-person	Annually	1
External Relations	Institutional Advancement	Campus Foundation CFOs	Campus-designated foundation CFOs, OP personnel	Conference Call	Monthly	12
External Relations	Institutional Advancement	Campus Foundation CFOs	Campus-designated foundation CFOs, OP personnel	In-person	Annually	1
External Relations	Institutional Advancement	Campus Foundation Trustees (Investment Forum)	Campus foundation trustees, OP personnel	In-person	Tri-annually	3
External Relations	Institutional Advancement	Corporate and Foundation Relations	Campus directors of corporate and foundation relations, OP personnel	Conference Call	Semi-annually	2
External Relations	Institutional Advancement	Corporate and Foundation Relations	Campus directors of corporate and foundation relations, OP personnel	In-person	Annually	1
External Relations	Institutional Advancement	International Giving group	Campus personnel interested in international giving, OP personnel	In-person	Annually	1
External Relations	Institutional Advancement	Parent Giving Directors	Campus parent giving directors, OP personnel	Depends on campus chair	As needed	
External Relations	Institutional Advancement	Planned Giving	Campus planned giving directors & staff, OP personnel	Conference Call	As needed	
External Relations	Institutional Advancement	Planned Giving	Campus planned giving directors & staff, OP personnel	In-person	Annually	1
External Relations	Institutional Advancement	Stewardship Coordinators	Campus stewardship coordinators, OP personnel	In-person	Annually	1
External Relations	Institutional Advancement	Support Group Coordinators	Campus designees, OP personnel	Conference Call	As needed	
External Relations	Institutional Advancement	University Relations Vice Chancellors Council (URVCCC)	Campus vice chancellors for university/external relations, OP personnel (inc SVP - External Relations)	Conference Call	Tri-annually	3
External Relations	Institutional Advancement	University Relations Vice Chancellors Council (URVCCC)	Campus vice chancellors for university/external relations, OP personnel (inc SVP - External Relations)	In-person	Semi-annually	2

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
External Relations	State Governmental Relations (SGR)	Health and medical center governmental relations directors (Health GRDs)	Campus health ed/ med school/ med center state GRDs, OP personnel	Conference Call	Weekly	50
External Relations	State Governmental Relations (SGR)	Health and medical center governmental relations directors (Health GRDs)	Campus health ed/ med school/ med center state GRDs, OP personnel	In-person	Semi-annually	2
External Relations	State Governmental Relations (SGR)	State governmental relations directors (GRDs)	Campus state GRDs, OP personnel	Conference Call	Weekly	50
External Relations	State Governmental Relations (SGR)	State governmental relations directors (GRDs)	Campus state GRDs, OP personnel	In-person	Quarterly	4
Finance Office	Capital Markets Finance	Debt Advisory Group	Vice Chancellors	In-person	Annually	1
Finance Office	Capital Markets Finance	Debt Advisory Sub Group	Debt Managers as designated by AVC's	In-person	Quarterly	4
Finance Office	Capital Markets Finance	Rating Agency Meeting	OP Management/Individual Campus	In-person	Annually	1
Finance Office	Financial Accounting	Foundations Call	Controllers and Executive Directors from all campuses and UCOP (11-15 attendees)	Conference Call	Monthly	12
Finance Office	Financial Accounting	UC Controller's Meeting	All campus Controllers and UCOP (15-20 attendees)	In-person	Monthly	12
Finance Office	Financial Accounting	UC Medical Controller's Meeting	Medical Controllers from UCOP, UCD, UCI, UCLA, UCSD, and UCSF (10 attendees)	Conference Call	Monthly	12
Finance Office	Financial Accounting	UC Medical Controller's Meeting	Medical Controllers from UCOP, UCD, UCI, UCLA, UCSD, and UCSF (10 attendees)	In-person	Quarterly	4
Finance Office	Financial Controls and Services	Control Directors Forum	Campuses	In-person	Annually	1
Finance Office	Financial Controls and Services	Corporate Card and Procurement Card Meeting	Campuses and Labs	In-person	Annually	1
Finance Office	Financial Controls and Services	Credit Card Coordinators Meetings	Campuses and Labs	In-person	Annually	1
Finance Office	Financial Controls and Services	UC Travel Council	Campuses and Labs	In-person	Monthly	12
Finance Office	Risk Services	Campus Emergency Managers (Council of Emergency Managers)	Systemwide staff from Public Safety (police/fire); EH&S; Medical Centers; and independent Emergency Management offices (multiple disciplines and depts.)	Conference Call	Monthly	12
Finance Office	Risk Services	Center for Health Quality for Improvement Enterprise Risk Management (CHQIERM)	OPRS, Health Sciences and Services, Medical Center Risk Managers and other designated representatives	Conference Call	Periodic	
Finance Office	Risk Services	Disability Management call	Systemwide disability managers	Conference Call	Monthly	12

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Finance Office	Risk Services	Employment Practices Improvement Committee (EPIC)	Members of the Risk, Legal, and HR constituencies throughout the system	Teleconference	Quarterly	4
Finance Office	Risk Services	ERM Panel Meeting	ERM Panel Members (total list of 53 members)	Teleconference	Monthly	12
Finance Office	Risk Services	ERM Toolbox Webinar	ERM Practitioners, Risk Managers (distribution list has about 235 subscribers, some non-UC)	Teleconference	Monthly	12
Finance Office	Risk Services	General Liability Monthly Call	Directors of Risk at all locations and their staff	Conference Call	Monthly	12
Finance Office	Risk Services	Incident Report Steering Committee	OPRS and selected medical center representatives: Kathy Rowe (UCDHS), Ivy Kolvan and Kathy Radics (UCSF MC), Tod Barry (UCLAMC), Nance Hove (UCI MC), Andrea Snyder and Eema Homan (UCSD MC); Student Health and Counseling Center representatives periodically	Conference Call	Monthly	12
Finance Office	Risk Services	Occupational & Environmental Advisory Coalition	Occupational medicine directors	Conference Call	Monthly	12
Finance Office	Risk Services	PL Monthly Risk Management	OPRS and Medical Center Risk Management Staff	Conference Call	Monthly	12
Finance Office	Risk Services	PL Trial Conference Calls	OPRS, OGC, Third Party Administrators and Medical Center Risk Management Staff	Conference Call	Bi-monthly	6
Finance Office	Risk Services	Risk Management Leadership Council (RMLC)	Management on all Campuses and Medical Centers	Conference Call	Monthly	12
Finance Office	Risk Services	Student Health and Counseling Credentialing	OPRS and Student Health and Counseling Center Credentialing Staff and Directors or others as interested	Conference Call	Bi-monthly	6
Finance Office	Risk Services	Student Health and Counseling Peer Review	OPRS and Student Health and Counseling Center Designated individuals	Conference Call	Bi-monthly	6
Finance Office	Risk Services	Student Health Counseling Center	OPRS and Student Health Counseling Center Directors	Conference Call	Bi-weekly	25
Finance Office	Risk Services	Student Health Services and Counseling and Psychology Services (SHS & CAPS) initiative Weekly Call	SHS and CAPS EMR IT staff	Conference Call	Weekly	50
Finance Office	Risk Services	Student Health Steering Panel	UCOP and Campus leaders providing oversight to Student Health and Counseling Services	Teleconference	Monthly	12

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Finance Office	Risk Services	UC Ready	Systemwide UC Ready/Business Continuity Planners	Conference Call	Monthly	12
Finance Office	Risk Services	UC SHIP Advisory Board	UCOP, campus administrators and student stakeholders in UC SHIP	In-person	Quarterly	4
Finance Office	Risk Services	UC SHIP Executive Committee	UCOP and Campus leaders providing oversight to UC SHIP	In-person	Tri-annually	3
Finance Office	Risk Services	UC SHIP Operations Team	UC SHIP team and Student Health Insurance Managers on each campus	Teleconference	Bi-weekly	25
Finance Office	Risk Services	Workers' Compensation Manager Call	Systemwide workers' compensation managers	Conference Call	Quarterly	4
Finance Office	Risk Services	WorkStrong	Occupational medicine directors, WorkStrong coordinators, workers' compensation managers, wellness directors, sports recreation directors	Conference Call	Bi-monthly	6
Finance Office	Procurement Services	Equipment Managers	All campuses including med centers and lab	In-person	Annually	1
Finance Office	Procurement Services	Equipment Managers	All campuses including med centers and lab	Teleconference	Monthly	12
Finance Office	Procurement Services	Life Science Commodity Managers	All ten campus science procurement managers including stockroom personnel and sometimes Materiel Managers	Teleconference	Bi-weekly	25
Finance Office	Procurement Services	Maintenance Repairs and Operations: Business Reviews	2 Rep from Sourcing from each site	Teleconference	Quarterly	4
Finance Office	Procurement Services	Maintenance Repairs and Operations: Flooring Workgroup	5 Reps from various sites	Teleconference	Bi-monthly	6
Finance Office	Procurement Services	Maintenance Repairs and Operations: Janitorial Workgroup	5 Reps from various sites	Teleconference	Bi-monthly	6
Finance Office	Procurement Services	Maintenance Repairs and Operations: MRO & Facilities Commodity Team	1 Rep from Sourcing from each site	Teleconference	Bi-monthly	6
Finance Office	Procurement Services	Maintenance Repairs and Operations: MRO Workgroup	5 Reps from various sites	Teleconference	Bi-monthly	6
Finance Office	Procurement Services	P200 Procurement Leadership Council Call	Campus Procurement Directors and UCOP Procurement Leadership	In-person	Weekly	50
Finance Office	Procurement Services	P200 Procurement Leadership Council Meeting	Campus Procurement Directors and UCOP Procurement Leadership	In-person	Bi-monthly	6
Finance Office	Procurement Services	PC Configuration Team Call	IT Desktop Support and PC Buyers	Teleconference	Quarterly	4

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Finance Office	Procurement Services	Small Business Managers	All campuses including med centers and lab	In-person	Annually	1
Finance Office	Procurement Services	Small Business Managers	All campuses including med centers and lab	Teleconference	Monthly	12
Finance Office	Procurement Services	Sourcing Technology: Campus Primary Rep (CPR) - Sourcing Directory Check-in	Subject matter experts responsible for communicating problems and enhancement requests to the P200 core team as well as defining the system-wide configuration of Sourcing Technology	In-person	Weekly	50
Finance Office	Procurement Services	Sourcing Technology: Campus Primary Rep (CPR) - Supplier Registration and Sourcing Feature Request Review/Prioritization	Subject matter experts responsible for communicating problems and enhancement requests to the P200 core team as well as defining the system-wide configuration of Sourcing Technology	In-person	Monthly	12
Finance Office	Procurement Services	Spend Analytics: Campus Primary Rep (CPR) - Enhancements Review/Prioritization	Subject matter experts responsible for communicating problems and enhancement requests to the P200 core team as well as defining the system-wide configuration of Spend Analytics	In-person	Monthly	12
Finance Office	Procurement Services	Spend Analytics: Campus Primary Rep (CPR) Check-in	Subject matter experts responsible for communicating problems and enhancement requests to the P200 core team as well as defining the system-wide configuration of Spend Analytics	In-person	Weekly	50
Finance Office	Procurement Services	Spend Analytics: Governance	Campus representatives from most, but not all, campuses as elected by the PLC	In-person	Weekly	50
Finance Office	Procurement Services	SPOC Change Readiness Call	Campus leaders responsible for engaging campus users, stakeholders and senior leaders in change readiness activities for P200. Multi-way communication channel to facilitate shared learning between the campuses	In-person	Weekly	50
Finance Office	Procurement Services	Technical Acquisition Support (TAS)	All campuses including some medical centers have a primary and secondary TAS representative as delegated by their CIO	In-person	Annually	1
Finance Office	Procurement Services	Technical Acquisition Support (TAS)	All campuses including some medical centers have a primary and secondary TAS representative as delegated by their CIO	Teleconference	Weekly	50

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Health Sciences and Services	Center for Health Quality and Innovation	Operations Committee	UC Health Leaders, HSS	Conference Call	As needed	
Health Sciences and Services	Center for Health Quality and Innovation	Operations Committee	UC Health Leaders, HSS	In-person	Quarterly	4
Health Sciences and Services	Health Sciences and Services	CA Medical School Admissions Deans (all 9 allopathic CA medical schools)	Medical School Admission Deans and AVP HSS	In-person	Semi-annually	2
Health Sciences and Services	Health Sciences and Services	Cardiovascular Service Management Group	Hospital Cardio Teams, facilitated by 1 HSS Director	Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services	CFO Call (Hospitals)	Self-led by CFOs, SVP HSS participates	Conference Call	Bi-weekly	25
Health Sciences and Services	Health Sciences and Services	Chief Information Officers Call	CIOs, 1 Health Sciences Director	Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services	Chief Medical Officers, Chief Nurse Officers, Medical Directors	Health Sciences Leadership, senior Hospital Medical Leadership	Conference Call	Bi-weekly	25
Health Sciences and Services	Health Sciences and Services	Chief Medical Officers, Chief Nurse Officers, Medical Directors	Health Sciences Leadership, senior Hospital Medical Leadership	In-person	Quarterly	4
Health Sciences and Services	Health Sciences and Services	COO Call (Hospitals)	Self-led by COOs, SVP HSS participates	Conference Call	Bi-weekly	25
Health Sciences and Services	Health Sciences and Services	Cross Campus Nursing Group – special systemwide academic initiative	Convened by HSS AVP	In-person	Quarterly	4
Health Sciences and Services	Health Sciences and Services	Delivery Service Reform Incentive Payment Workgroup	Hospital Project Managers, 1 HSS Director	Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services	Faculty Practice		Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services	Health Care Epidemiology Collaborative	Medical Faculty and 1 HSS Director	Conference Call	Bi-monthly	6
Health Sciences and Services	Health Sciences and Services	Health Care Epidemiology Collaborative	Medical Faculty and 1 HSS Director	In-person	Quarterly	4
Health Sciences and Services	Health Sciences and Services	Hospital CEOs	SVP of HSS, CEOs	Conference Call	Bi-weekly	25
Health Sciences and Services	Health Sciences and Services	Hospital CEOs	SVP of HSS, CEOs	In-person	Quarterly	4
Health Sciences and Services	Health Sciences and Services	Interagency Taskforce on Re-Opening MLK Hospital	SVP, UCLA, other stakeholders	Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services	Managed Care Directors	Senior HSS Leadership and Hospital Managed Care Directors	In-person	Monthly	12

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Health Sciences and Services	Health Sciences and Services	Patient Experience Officers	PEOs (Marketing, Patient Affairs Officers, etc.), led by 1 HSS Director	Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services	Performance Excellence/ Lean Team	Hospital Leadership and some HSS Support	Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services	Pharmacy Directors	Pharmacy Directors, 1 HSS Director	Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services	Schools of Medicine Deans (6 of them)	Senior leadership HSS, Med School Deans	Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services	Schools of Medicine Deans (6 of them)	Senior leadership HSS, Med School Deans	In-person	Annually	1
Health Sciences and Services	Health Sciences and Services	Student Health Steering Panel	SVP HSS Chairs, Senior student health leadership from campuses, as well as student leaders, and others at OP	Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services	Supply Chain	HSS Director and Hospital Purchasing Officials	Conference Call	Bi-weekly	25
Health Sciences and Services	Health Sciences and Services	Supply Chain	HSS Director and Hospital Purchasing Officials	In-person	Bi-monthly	6
Health Sciences and Services	Health Sciences and Services	Transplant Team	Hospital Leadership and HSS Leadership	Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services	Transplant Team	Hospital Leadership and HSS Leadership	In-person	Semi-annually	2
Health Sciences and Services	Health Sciences and Services	UC Graduate Medical Education Deans (6 UC Schools of Medicine)	Deans and AVP, HSS.	In-person	Tri-annually	3
Health Sciences and Services	Health Sciences and Services	UC Health Sciences Committee (6 HS deans; 9 other senior administrators)	6 HS deans; 9 other senior administrators, convened by HSS AVP.	In-person	Quarterly	4
Health Sciences and Services	Health Sciences and Services	UC Health Sciences Deans (deans of UC's 18 HS professional programs)	HSS AVP AND SVP and Deans.	Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services	UC Nursing Leadership (SON deans and Medical Center Chief Nursing Officers)	Senior HSS Leadership, Schools of Nursing Deans and CNOs.	In-person	Annually	1
Health Sciences and Services	Health Sciences and Services	UC PRIME Directors	Prime Directors and HSS Staff. PRIME is an innovative training program focused on meeting the needs of California's underserved.	In-person	Annually	1
Health Sciences and Services	Health Sciences and Services	UC Schools of Medicine Telemedicine Initiative (California Telehealth Network/Prop 1D)	Medical School Leaders, HSS.	In-person	Semi-annually	2
Health Sciences and Services	Health Sciences and Services	UC Vice Deans for Medical Education	Medical School Vice Deans and senior HSS Leadership	Conference Call	Monthly	12
Health Sciences and Services	Health Sciences and Services, Anatomical Affairs	UC MC Clinical Anatomical Pathology Laboratory Consortium	Hospital Leaders, Pathology Labs, HSS Director who coordinates consortium	Conference Call	Monthly	12

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Health Sciences and Services	Health Sciences Clinical Affairs	All Health Professional School Deans	Senior leadership HSS, all Health Professional School Deans	Conference Call	Monthly	12
Health Sciences and Services	HSS- CHBRP	Faculty Taskforce	CHBRP Staff, Faculty	Conference Call	Weekly	50
Health Sciences and Services	HSS- CHBRP	Faculty Taskforce	CHBRP Staff, Faculty	In-person	Semi-annually	2
Health Sciences and Services	HSS- CHBRP	Faculty Taskforce & National Advisory	CHBRP Staff, Faculty, National Adv	In-person	Annually	1
Health Sciences and Services	SVP	Sacramento Call	Health Sciences Leadership, Hospital Senior Leadership, SGR, FGR	Conference Call	Bi-weekly	25
General Counsel		Campus Counsel Meetings	Campus-based attorneys from each campus, the General Counsel, and OGC Deputies	In-person	Tri-annually	3
General Counsel		Health Sciences Counsel Meetings	Medical center-based attorneys from each medical center, the Deputy General Counsel for Health Sciences & Medical Center Services, and Oakland-based health attorneys	In-person	As needed	
General Counsel		Individual Status Calls	Chief Campus Counsel from each campus and Deputy General Counsel to discuss significant, pending campus legal matters	One-On-One Calls	Bi-weekly	25
General Counsel		Individual Status Calls	Chief Health Sciences Counsel from each medical center and Deputy General Counsel to discuss significant, pending medical center legal matters	One-On-One Calls	Bi-weekly	25
General Counsel		OGC Leadership Team Meetings	General Counsel, OGC Deputies, and Chief Campus Counsel	Conference Call	Monthly	12
General Counsel		Status calls	Campus-based attorneys from each campus and OGC Deputies to discuss significant, pending OGC-Oakland legal and administrative matters with campus-based attorneys	Conference Call	Monthly	12
General Counsel		Strategic Plan implementation Meetings	General Counsel, OGC Deputies, Chief Campus Counsel, Strategic Plan Champions	Conference Call	Monthly	12
Office of the Provost	APPC	Academic Planning Council	Joint Academic Senate and campus Administration committee	In-person	Tri-annually	3
Office of the Provost	APPC	Academic Planning Council	Joint Academic Senate and campus Administration committee	Teleconference	Tri-annually	3

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Office of the Provost	APPC	Council of University Librarians (CoUL)	University Librarians representing all UC campuses and the California Digital Library (CDL)	In-person	Annually	1
Office of the Provost	APPC	Council of University Librarians (CoUL)	University Librarians representing all UC campuses and the California Digital Library (CDL)	Teleconference	Monthly	12
Office of the Provost	APPC	Joint Steering Committee on Shared Collections (JSC)	Collection Development Directors from select UC campuses and the CDL	Teleconference	Monthly	12
Office of the Provost	APPC	Summer Sessions Deans/Directors	Dean/directors, Associate and Assistant Directors of Summer Sessions	In-person	Semi-annually	2
Office of the Provost	APPC	UC campus Accreditation Liaison Officers (ALOs)	Designated campus official (i.e. UG Dean, VP for Office of the Provost, VP for Student Affairs, Institutional Planning & Analysis Director)	In-person	Semi-annually	2
Office of the Provost	APPC	UC Libraries Systemwide Operations and Planning Advisory Group (SOPAG)	Asst. and Assoc. University Librarians and library directors/managers representing UC Campuses and the CDL	Teleconference	Bi-weekly	25
Office of the Provost	APPC	Undergraduate Deans	Vice Provosts and Deans for Undergraduate Education	In-person	Tri-annually	3
Office of the Provost	Education Partnerships	CalTeach Coordinators	Staff coordinators for the CalTeach programs at each campus (excludes UCSF)	Teleconference	Monthly	12
Office of the Provost	Education Partnerships	CSMP Concurrence Committee Meetings	Comprised of appointees by the Governor's office, UC, CSU, CCC, SBE, AICCU, CDE, Instructional Quality Commission, and CTC	In-person	Semi-annually	2
Office of the Provost	Education Partnerships	CSMP Executive Directors Meetings	Executive Directors of each of the nine California Subject Matter Projects (CSMP)	In-person	Bi-monthly	6
Office of the Provost	Education Partnerships	Early Academic Outreach Program (EAOP) Directors	EAOP Directors from the ten campuses	In-person	Semi-annually	2
Office of the Provost	Education Partnerships	Early Academic Outreach Program (EAOP) Directors	EAOP Directors from the ten campuses	Teleconference	Semi-annually	2
Office of the Provost	Education Partnerships	SAPEP Council	Comprised of a single representative from each of the statewide Student Academic Preparation and Education Partnership programs (MESA, EAOP, SIP, P20 Regional Alliances, UC Links, UC Scout, Puente	In-person	Semi-annually	2

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Office of the Provost	Education Partnerships	SAPEP Council	Comprised of a single representative from each of the statewide Student Academic Preparation and Education Partnership programs (MESA, EAOP, SIP, P20 Regional Alliances, UC Links, UC Scout, Puente	Teleconference	Semi-annually	2
Office of the Provost	Education Partnerships	Student Initiated Program Representatives	Campus student organization staff and representatives from the UC undergraduate campuses	In-person	Semi-annually	2
Office of the Provost	Education Partnerships	UC Transfer Preparation Committee	UC transfer admissions and program directors from the UC undergraduate campuses	In-person	Semi-annually	2
Office of the Provost	Education Partnerships	UC Transfer Preparation Committee	UC transfer admissions and program directors from the UC undergraduate campuses	Teleconference	Semi-annually	2
Office of the Provost	Education Partnerships (in collaboration with host campus Dean/Director)	Education Deans & Directors	Comprised of Deans/Chairs of Departments/Schools of Education and the Directors of Teacher Education Programs at each campus	In-person	Quarterly	4
Office of the Provost	Education Partnerships (in collaboration with host campus Dean/Director)	P20 Leaders	Comprised of P20 leaders from each of the 10 campuses (2 per campus)	In-person	Quarterly	4
Office of the Provost	Institutional Research	Institutional Research Directors	Institutional Research Directors	In-person	Semi-annually	2
Office of the Provost	Provost Immediate Office	Annual Meeting	Senate Leadership, UCOP VPs	In-person	Annually	1
Office of the Provost	Provost Immediate Office	Chiefs of Staff to EVC	EVC Chiefs of Staff	In-person	Monthly	12
Office of the Provost	Provost Immediate Office	Council of Executive Vice Chancellors	Campus Executive Vice Chancellors	In-person	Monthly	12
Office of the Provost	Research and Graduate Studies	Council of Vice Chancellors of Research	Vice Chancellors of Research	In-person	Tri-annually	3
Office of the Provost	Research and Graduate Studies	Council of Vice Chancellors of Research	Vice Chancellors of Research	Teleconference	Monthly	12
Office of the Provost	Research and Graduate Studies	Research Development Officers	Research Development Officers	Conference Call	Monthly	12
Office of the Provost	Research and Graduate Studies	Research Development Officers	Research Development Officers	In-person	Annually	1
Office of the Provost	Research and Graduate Studies	Technology Transfer Advisory Committee (TTAC)	TTAC Committee Members	In-person	Semi-annually	2
Office of the Provost	Research and Graduate Studies/ Graduate Studies	Council of Graduate Deans	Graduate Division Deans	Conference Call	Monthly	12

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Office of the Provost	Research and Graduate Studies/ Graduate Studies	Council of Graduate Deans	Graduate Division Deans	In-person	Semi-annually	2
Office of the Provost	Research and Graduate Studies/ Natural Reserve System	University wide Natural Reserve System Advisory Committee	Committee Members (includes reps from each of the nine general campuses)	In-person	Semi-annually	2
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Clinical Trial Officers	Clinical Trial Agreement Professionals	Conference Call	Monthly	12
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Clinical Trial Officers	Clinical Trial Agreement Professionals	In-person	Annually	1
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Conflict of Interest (COI) Coordinators	COI Negotiators	Conference Call	Monthly	12
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Conflict of Interest (COI) Coordinators	COI Negotiators	In-person	Semi-annually	2
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Contracts & Grants (C&G) Directors	Directors of C&G Offices	Conference Call	Monthly	12
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Contracts & Grants (C&G) Officers	C&G Professionals	In-person	Semi-annually	2
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Institutional Animal Care and Use Committee (IACUC) Directors	IACUC Directors	Conference Call	Quarterly	4
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Institutional Animal Care and Use Committee (IACUC) Directors	IACUC Directors	In-person	Semi-annually	2
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Institutional Review Board (IRB) Directors	IRB Directors	Conference Call	Monthly	12

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Institutional Review Board (IRB) Directors	IRB Directors	In-person	Semi-annually	2
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Intellectual Property Directors	Directors of Tech Transfer Office	Conference Call	Monthly	12
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Intellectual Property Directors	Directors of Tech Transfer Office	In-person	Semi-annually	2
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Intellectual Property Managers	Tech Transfer Professionals	In-person	Semi-annually	2
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Material Transfer Agreement (MTA) Negotiators	MTA Professionals	Conference Call	Quarterly	4
Office of the Provost	Research and Graduate Studies/ Research Policy Analysis and Coordination	Material Transfer Agreement (MTA) Negotiators	MTA Professionals	In-person	Annually	1
Office of the Provost	Student Affairs	Admissions Evaluators	UCOP and campus staff	In-person	Semi-annually	2
Office of the Provost	Student Affairs	applyUC Advisory Group	Systemwide Admissions staff, UCOP staff (IT & Admissions)	Teleconference	Bi-weekly	25
Office of the Provost	Student Affairs	ASSIST Advisory Board	Staff and faculty from all three segments	In-person	Semi-annually	2
Office of the Provost	Student Affairs	ASSIST Executive Management/Technical Advisory	UCOP, CSUCO, CCCCCO leads	In-person	Monthly	12
Office of the Provost	Student Affairs	ASSIST Users Group	UC, CSU, CCC campus staff	In-person	Quarterly	4
Office of the Provost	Student Affairs	Campus Articulation Officers Meeting	UCOP and campus articulation officers	Teleconference	Monthly	12
Office of the Provost	Student Affairs	Collaborative Recruitment Team	Senior UCOP and campus staff	Teleconference	Monthly	12
Office of the Provost	Student Affairs	Counselor Conference Meetings	Senior UCOP and campus staff	Teleconference	Semi-annually	2
Office of the Provost	Student Affairs	Education Financing Model Steering Committee	Financial Aid Directors, AVC's for Enrollment Management, VCSA's and VC's for Planning and Budget	Teleconference	Quarterly	4

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
Office of the Provost	Student Affairs	Ensuring Transfer Success (ETS) Conference Committee	UCOP and Campus Admissions & Ed Partnerships staff	Teleconference	Semi-annually	2
Office of the Provost	Student Affairs	Greek Life	Greek Life Directors and Coordinators	Teleconference	Semi-annually	2
Office of the Provost	Student Affairs	Loan Collection Managers	Loan Collections Managers and Collectors	Teleconference	Monthly	12
Office of the Provost	Student Affairs	Preferred Lender List Committee	Financial Aid Administrators	Teleconference	Weekly	50
Office of the Provost	Student Affairs	Student Programs and Activities Directors	Student Program and Activities Directors and Coordinators	Teleconference	Quarterly	4
Office of the Provost	Student Affairs	Systemwide Strategic Admissions Taskforce (SSAT)	Admissions Directors, UCOP Staff & Associate Vice Chancellors	In-person	Semi-annually	2
Office of the Provost	Student Affairs	Transfer Admission Guarantee/Transfer Admission Planner	UCOP and Campus Admissions & Ed Partnerships staff	Teleconference	Quarterly	4
Office of the Provost	Student Affairs	UC CARE Managers	CARE and Case Managers, AVCs, Assistant AVCs, Social Workers	Teleconference	Bi-weekly	25
Office of the Provost	Student Affairs	UC Student Mental Health Initiative Campus Psychologists (SMHI)	SMHI Campus Psychologists and Staff	Teleconference	Monthly	12
Office of the Provost	Student Affairs	UC Student Mental Health Oversight Committee (SMHOC)	Campus Student Affairs staff, students, Counseling Directors	In-person	Quarterly	4
Office of the Provost	Student Affairs	UC Undergraduate Experience Survey Steering Committee (UCUES)	VCSA, Dean of Undergraduate Education, IR Directors, Faculty	Teleconference	Quarterly	4
Office of the Provost	Student Affairs	University Committee on Preparatory Education (UCOPE)	Systemwide faculty & UCOP staff	In-person	Semi-annually	2
Office of the Provost	Student Affairs	Undergraduate Admissions Directors	Admissions Directors & UCOP staff	Teleconference	Bi-weekly	25
Office of the Provost	Student Affairs	Veterans Services	Veteran Service Coordinators, Veteran Education Benefit Certifying Officials (Registrar/Financial Aid), UC Extension staff	Teleconference	Bi-weekly	25
Office of the Provost	Student Affairs	Vice Chancellors of Student Affairs (VCSA) Council	Vice Chancellors Student Affairs	In-person	Quarterly	4
Office of the Provost	Student Affairs	Vice Chancellors of Student Affairs (VCSA) Council	Vice Chancellors Student Affairs	Teleconference	Monthly	12
Office of the Provost	ANR	Deans of Colleges	Dean of NR from UCR and UCB, Dean of Ag at UCD and Dean of Vet School at UCD	Conference Call	Quarterly	4
President's Executive Office		Agriculture Advisory Board	President, outside members, some campus faculty/staff	In-person	Annually	1

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Division	Department	Name of Systemwide Call/ Meeting	Attendees/Description	Type of Meeting	Frequency	Times a year
President's Executive Office		Associate to the President/Chancellor Meetings	Spouses of the President/Chancellors	In-person	Bi-monthly	6
President's Executive Office		Associate/Assistant Chancellor/Chief of Staff Call	Debrief to Monthly COC Mtg	Conference Call	Monthly	12
President's Executive Office		Associate/Assistant Chancellor/Chief of Staff Meeting	Chief of Staff to the President, Campus Associate/Assistant Chancellors/Chiefs of Staff	In-person	Bi-monthly	6
President's Executive Office		Council of Chancellors (COC)	Session A: President, Chancellors, Chief of Staff to the President; Session B: All participants from Session A + UCOP VPs as appropriate	In-person	Monthly	12
President's Executive Office		Joint Council of Chancellors + Council of Vice Chancellors (COC/COVC) Meeting [EVCs join one regular COC meeting]	President, Chancellors, Provosts/EVCs	In-person	Annually	1
President's Executive Office		President's Advisory Council on Campus Climate, Culture and Inclusion (CCCI)	President, Special Assistant Edley, UC systemwide and prominent non-UC representatives	In-person	Tri-annually	3
President's Executive Office		President's Task Force on LGBT Issues	UC systemwide and prominent non-UC representatives	In-person	Quarterly	4
President's Executive Office		Regents Meeting	President, Chancellors	In-person	Bi-monthly	6
President's Executive Office		Science Technology Board	President, outside members, some campus faculty/staff	In-person	Annually	1
President's Executive Office		Systemwide Committee on the Status of Women	President, systemwide Chairs/ reps of campus committees	In-person	Annually	1



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University of California
1111 Franklin Street, 5th Floor
Oakland, CA 94607-5200