



Council of University of California Staff Assemblies

**Staff Engagement Survey Forum
UC Santa Barbara
June 12, 2013**



CUCSA's Mission

In support of the mission of the University of California, it is the purpose of the Council of UC Staff Assemblies (CUCSA) to maintain and enhance communication within the University Community on matters of interest to staff employees, in accordance with California laws and Regental policy.



Engagement with Administration

- Quarterly Meetings with the President
- Regular meetings with the following people:
 - EVP Nathan Brostrom
 - Provost Aimee Dorr
 - Academic Council Chair Bob Powell
 - VP of Human Resources Dwaine Duckett



Significant Accomplishments

- Creation of the Staff Advisor to the Regents position
- Domestic Partner Benefits
- Post-Employment Benefits
- Senior Leader Award



Work Groups for 2013

- Health and Welfare Benefits
- Supervisor Training
- Compensation Education



Priorities for 2013

- Educational Benefits for Staff – Create centralized program administration to track metrics and review usage data.
- Talent Analytics – Career Arc tracking and entrance, exit and transition surveys
- Performance Management – Goal setting, continuous feedback and best practices for mentorship and sponsorship
- Engagement Survey Rollout and Action



Engagement Survey Historical Perspective

- Many CUCSA workgroups over the years mentioned employee engagement as an issue
- OP offered to conduct this pulse survey
- Staff Advisor to the Regents Kevin Smith and CUCSA Chair Ravinder Singh worked with Towers Watson and OP to come up with questions and sampling methodology
- Engagement Survey results roll out and action plan is a priority for 2013
- Today we are here to present the results of the survey and request ideas for action



Climate vs. Engagement

- **Campus Climate:** the current attitudes, behaviors and standards of faculty, staff, administrators and students concerning the level of respect for individual needs, abilities and potential
- **Employee Engagement:** an employee's involvement with, commitment to, and satisfaction with work



Now on to the data...



University of California

2012 UC Staff Engagement Survey Results

Spring 2013

TOWERS WATSON 

Agenda

- UC Survey Objectives and Methods
- Key Messages
- University of California Overall Results: Norm Comparisons
- Sustainable Engagement and Retention at UC
- Written Comments
- Action Area Considerations and Next Steps

UC Survey Objectives and Methods

Survey Objectives	<ul style="list-style-type: none"> Understand the current state of engagement of the UC workforce system-wide and how it differs by key organizational segments and demographics Determine what drives engagement at UC specifically Surface strengths to build on and opportunities to address; create a shortlist of actions to address issues and improve employee engagement across the system Involve and communicate with leaders and employees throughout the process
Target Population	<p>Non-represented UC staff with at least 1 year of service were invited to take the survey from May 31st to July 12th, 2012. All UC locations participated except Hastings, ASUCLA and the Medical Centers.</p>
Employee Sample	<p>A random stratified sample was selected based on campus. We over-sampled to account for the roles of employees within the each campus. The personnel category was used to increase the sample (e.g., professional and support staff, management).</p>
Survey Content	<p><u>32 opinion items</u>: Engagement (8); Career Development (4); Communication (2); Image/ Brand (1); Organizational Change (2); Performance Management (3); Supervision (11); Working Relationships (1)</p> <p><u>1 open-ended comment opportunity</u>: <i>“What is the University of California’s most significant unrealized opportunity? And how can we capitalize on it?”</i> (58% comment response rate)</p>

Survey Participation Breakdown by Location

Administration Dates: May 31st – July 12th

Campus	Outgoing	Returned	Return Rate
UC Overall	18,789	8,096	43%
Berkeley	1,861	746	40%
San Francisco	1,789	686	38%
Davis	2,798	1,168	42%
Los Angeles	2,383	834	35%
Riverside	1,188	559	47%
San Diego	2,246	959	43%
Santa Cruz	1,249	624	50%
Santa Barbara	1,399	682	49%
Irvine	1,642	800	49%
Merced	405	180	44%
Lawrence Berkeley National Laboratory	1,067	485	45%
Division of Agriculture and Natural Resources	26	11	42%
Office of the President	735	362	49%

Key Messages — An Opportunity to Engage the Workforce

- Employee favorability overall is moderate, most categories falling below norms
- There are positive engagement signs — e.g., 84% are motivated to go beyond their job responsibilities and 74% would recommend UC as a good place to work
- Supervisor relationships and schedule flexibility are also perceived positively
- Yet there is a clear opportunity to further engage employees, as only about 2/3rds are generally engaged — this is below the national average and university benchmark
- If we break engagement down, **37%** of employees are **fully plugged in** at UC , **21%** are **engaged but report being at risk for leaving**, **22%** are **uninspired but not planning to leave**, and **20%** are **fully disengaged**
- Aspects of work life that matter most in engaging employees at UC offer opportunities:
 - **Developing** — inspiring and equipping employees on a fulfilling career path at UC
 - **Involving** — by listening and creating two-way dialogues
 - **Recognizing performance** — informally and by matching pay with performance

Retention risk:

- Some employees (21%) are engaged but considering leaving — there should be a focus on retaining these employees; turnover risk is notably higher than the U.S. norm and among other universities – more acute in specific populations
- In addition to development, supervisor relationships are important in retaining talent at UC

Key Messages — Strengths and Opportunities

- Strengths on which to build:

- **Supervisor relationships** — most employees feel favorable about their relationship with their supervisor. Specifically, most feel treated with respect and are clear on departmental goals. Most see their supervisor as listening to different point of views, encouraging new ideas, and supporting them in participating in training and development opportunities
- **Work-life balance** — 84% of UC employees report that their schedule affords them the flexibility they need to meet their personal/family responsibilities
- **'Natural' development** — 73% of employees do feel they have opportunities for personal growth and development at UC (most likely by nature of the job)

- Opportunities to address:

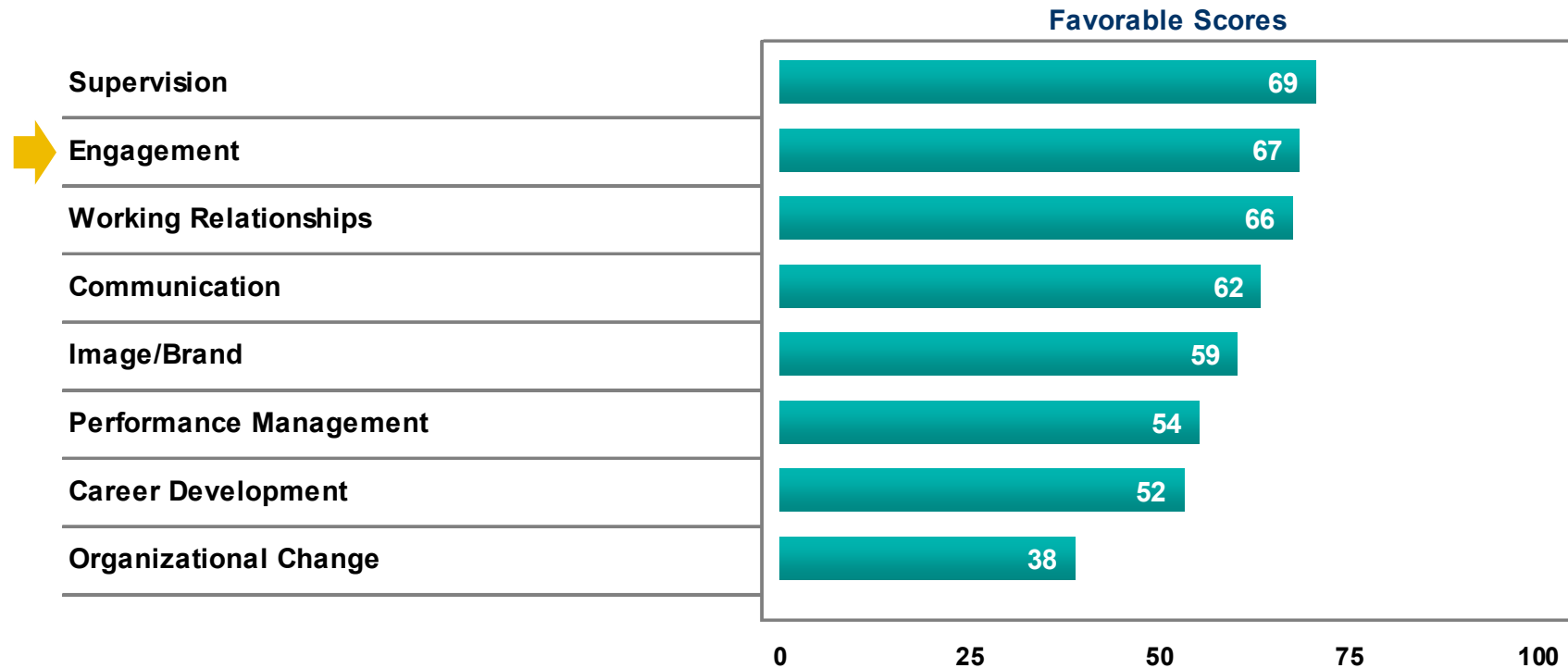
Drivers of UC Engagement

- **UC's support of development** — just 50% of employees say that UC provides them with the information and resources they need to manage their careers, only 59% say that their supervisors are directly involved in developing them, only 30% feel their UC campus/location is planning for management succession well, and only 55% are confident that they can achieve their personal/career objectives at UC. #1 in written comments and in driving engagement + retention
- **Involving by communicating** — just 61% of employees are satisfied with their involvement, only 58% say they can share their honest views, and only 67% say UC does an excellent job of keeping them informed
- **Managing performance** — only 24% feel UC matches pay and performance well. Performance management is #3 in written comments and clear driver of engagement



UC Overall Results: Norm Comparisons

UC Category Results



Note: The Image/Brand and Working Relationships categories contain only one item.

Variations by Role

A. UC OVERALL [W] (N=8,096)		D. MANAGER 2012 (N=1,607)				
B. INDIVIDUAL CONTRIBUTOR 2012 (N=4,089)		E. DIRECTOR AND ABOVE 2012 (N=851)				
C. SUPERVISOR 2012 (N=1,514)						
Values displayed are based on Total Favorable		Colored Cells indicate a statistically significant difference				
#	Category	A	B	C	D	E
1	Career Development	52	-4	3	4	7
2	Communication	62	-3	1	3	7
3	Engagement	67	-1	1	1	2
4	Image/Brand	59	-3	1	1	6
5	Organizational Change	38	-1	0	2	1
6	Performance Management	54	-2	2	2	5
7	Supervision	69	-1	2	2	2
8	Working Relationships	66	-3	0	5	11

Five Most and Least Favorable Items

Top 5 Favorable Scores

	Total Favorable	Neutral Midpoint	Total Unfavorable
SUPERVISION: I have a clear understanding of how my job contributes to the departmental objectives.	87	5	8
SUPERVISION: My supervisor treats me with respect.	85	5	10
ENGAGEMENT: I feel motivated to go beyond my formal job responsibilities to get the job done.	84	5	11
ENGAGEMENT: My work schedule allows sufficient flexibility to meet my personal/family needs.	84	4	12
ENGAGEMENT: I would recommend UC as a good place to work.	74	13	13

Bottom 5 Favorable Scores

	Total Favorable	Neutral Midpoint	Total Unfavorable
PERFORMANCE MANAGEMENT: I feel UC does a good job matching pay to performance.	24	11	65
CAREER DEVELOPMENT: My UC campus/location is doing a good job of planning for management succession.	30	31	39
ORGANIZATIONAL CHANGE: Generally, recent major organizational changes at UC have been: Well planned	33	26	40
ORGANIZATIONAL CHANGE: Generally, recent major organizational changes at UC have been: Well communicated	42	20	38
ENGAGEMENT: There is usually sufficient staff in my department to handle the workload.	43	8	49

Towers Watson Benchmarks for UC

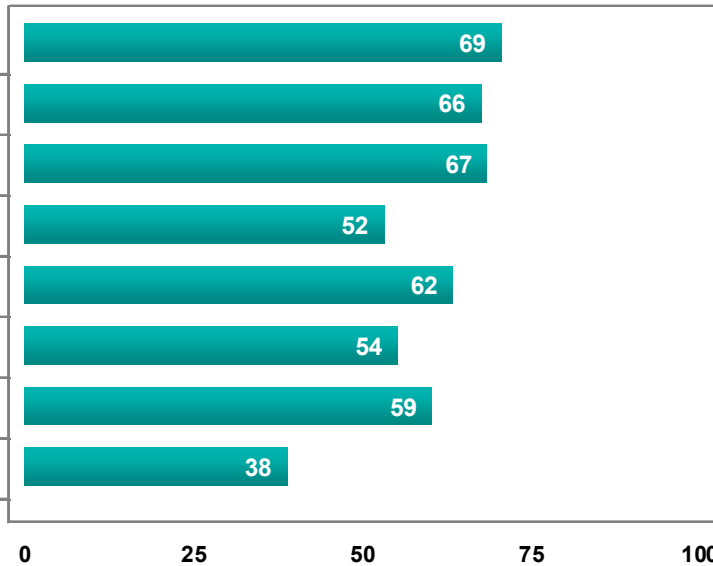
Towers Watson U.S. National Norm	<p><i>The U.S. National Norm provides a broad comparison to a composite of U.S. based organizations.</i></p> <p><i># associates represented: 1,254,281</i></p> <p><i>Sample companies: Amazon, Amgen, AT&T, Coca-Cola, Del Monte Foods, DirecTV, General Mills, Kaiser, McKesson, REI, Sara Lee, Verizon</i></p>
Towers Watson Universities Staff Composite	<p><i>The Global Universities Staff Composite provides a comparison to a composite of non-faculty staff employees in a cross-section of universities.</i></p> <p><i># associates represented: 31,851</i></p> <p><i>Sample universities: University of Notre Dame, Georgetown University, Loyola University Chicago</i></p>

Category Results: UC Overall vs. U.S. National Norm

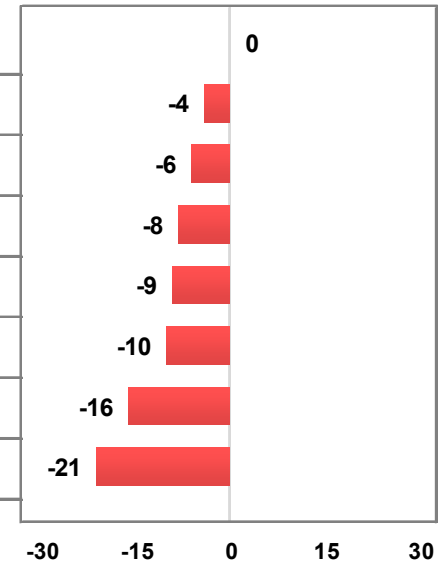
Categories Ranked By Difference

Supervision
Working Relationships
Engagement
Career Development
Communication
Performance Management
Image/Brand
Organizational Change

Favorable Scores



vs. U.S. National




Red / Green Difference Bars are statistically significant

Note: The Image/Brand and Working Relationships categories contain only one item.

Greatest Positive Variations for UC vs. U.S. National Norm

	Total Favorable	Diff	Neutral Midpoint	Total Unfavorable
SUPERVISION: My supervisor helps me make time to participate in training and development activities.	68	+15*	19	12
SUPERVISION: Please indicate the extent to which you agree with the following statements about your supervisor: Effectively deals with poor performers	46	+12*	21	33
SUPERVISION: Please indicate the extent to which you agree with the following statements about your supervisor: Listens carefully to different points of view before coming to conclusions	70	+12*	9	21
ENGAGEMENT: My work schedule allows sufficient flexibility to meet my personal/family needs.	84	+7*	4	12
CAREER DEVELOPMENT: I believe I have the opportunity for personal development and growth at UC.	73	+5*	6	21
SUPERVISION: Please indicate the extent to which you agree with the following statements about your supervisor: Encourages new ideas and new ways of doing things	73	+5*	9	17

Greatest Negative Variations for UC vs. U.S. National Norm

	Total Favorable	Diff	Neutral Midpoint	Total Unfavorable
PERFORMANCE MANAGEMENT: I feel UC does a good job matching pay to performance.	24	-30*	11	65
ORGANIZATIONAL CHANGE: Generally, recent major organizational changes at UC have been: Well communicated	42	-23*	20	38
ORGANIZATIONAL CHANGE: Generally, recent major organizational changes at UC have been: Well planned	33	-19*	26	40
COMMUNICATION: I feel able to openly and honestly communicate my views upwards.	58	-16*	9	33
IMAGE/BRAND: UC is highly regarded by its employees.	59	-16*	18	24
ENGAGEMENT: There is usually sufficient staff in my department to handle the workload.	43	-14*	8	49
CAREER DEVELOPMENT: UC provides people with the necessary information and resources to manage their own careers effectively.	50	-14*	18	32
CAREER DEVELOPMENT: I am confident I can achieve my personal career objectives with UC.	55	-11*	17	28
ENGAGEMENT: At the present time, are you seriously considering leaving UC?	59 	-11*	18 % "Don't Know"	23 
SUPERVISION: My supervisor does a good job of building teamwork.	62	-11*	11	28



Sustainable Engagement at UC

Sustainably Engaging UC's Workforce

- Sustainable Engagement at UC is...
 - The intensity of employees' connection to UC, marked by a commitment to UC and inspiration to do one's best work (being engaged) in environments that support productivity (being enabled) and maintain personal well-being (feeling energized)

Traditionally Engaged	Enabled	Energized
<ul style="list-style-type: none">• <i>I feel motivated to go beyond my formal job responsibilities to get the job done.</i>• <i>UC inspires me to do my best work.</i>• <i>I would recommend UC as a good place to work.</i>	<ul style="list-style-type: none">• <i>I am satisfied with my involvement in decisions that affect my work.</i>• <i>I have the equipment / tools /resources I need to do my job effectively.</i>	<ul style="list-style-type: none">• <i>There is usually sufficient staff in my department to handle the workload.</i>• <i>My work schedule allows sufficient flexibility to meet my personal/family needs.</i>

The truly engaged UC employee wants to stay with the organization, so a retention item is also included in the index: *At the present time, are you seriously considering leaving UC?*

UC Engagement Items

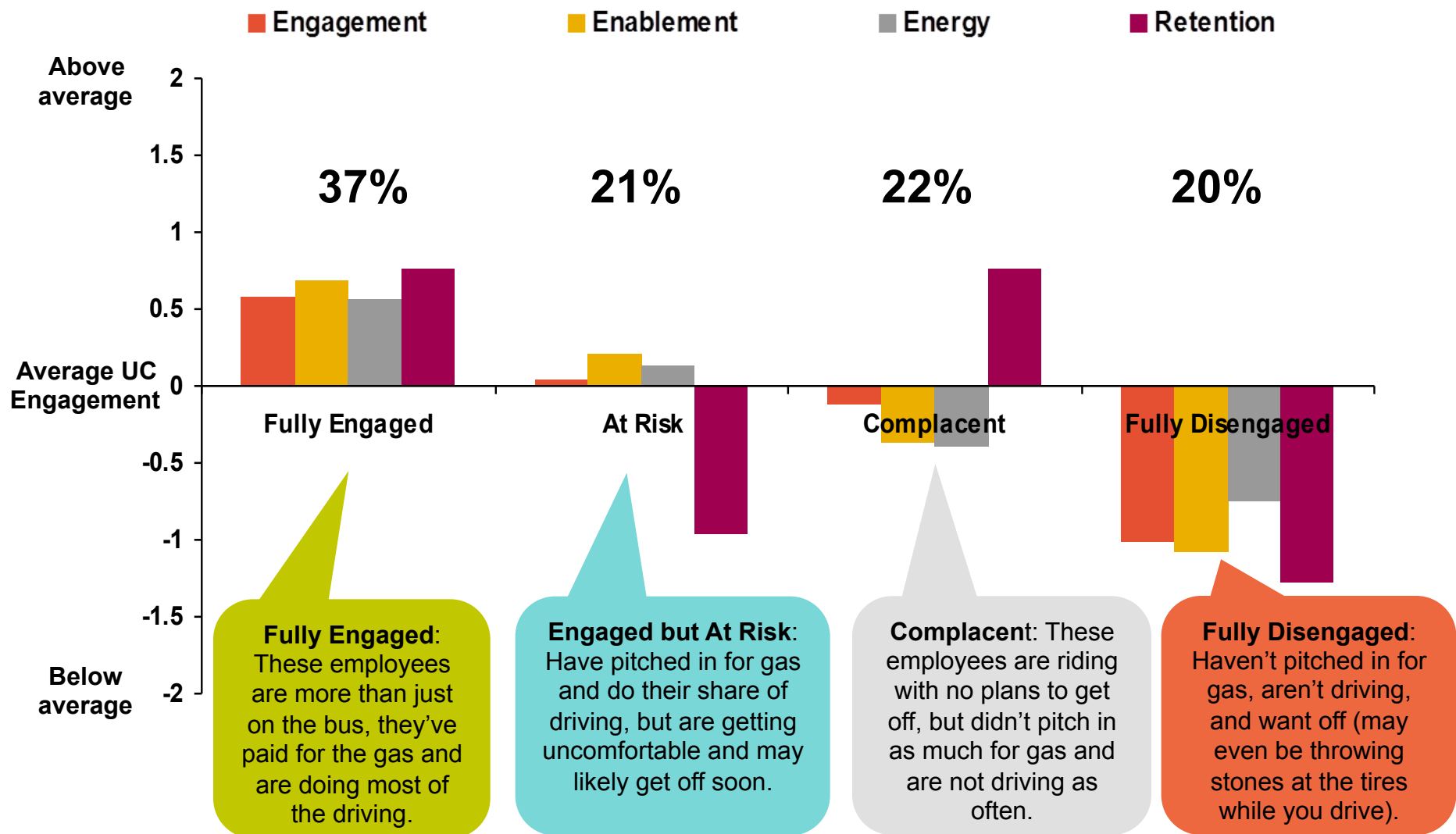
Comparison to U.S. National Norm and Global Universities Staff Composite

Items	Total Disagree		
	Total Agree		?
3. I feel motivated to go beyond my formal job responsibilities to get the job done.	84	5	11
11. UC inspires me to do my best work.	62	14	23
15. I am satisfied with my involvement in decisions that affect my work.	61	10	29
19. I have the equipment/tools/resources I need to do my job effectively.	73	7	20
21. There is usually sufficient staff in my department to handle the workload.	43	8	49
23. My work schedule allows sufficient flexibility to meet my personal/family needs.	84	4	12
25. I would recommend UC as a good place to work.	74	13	13

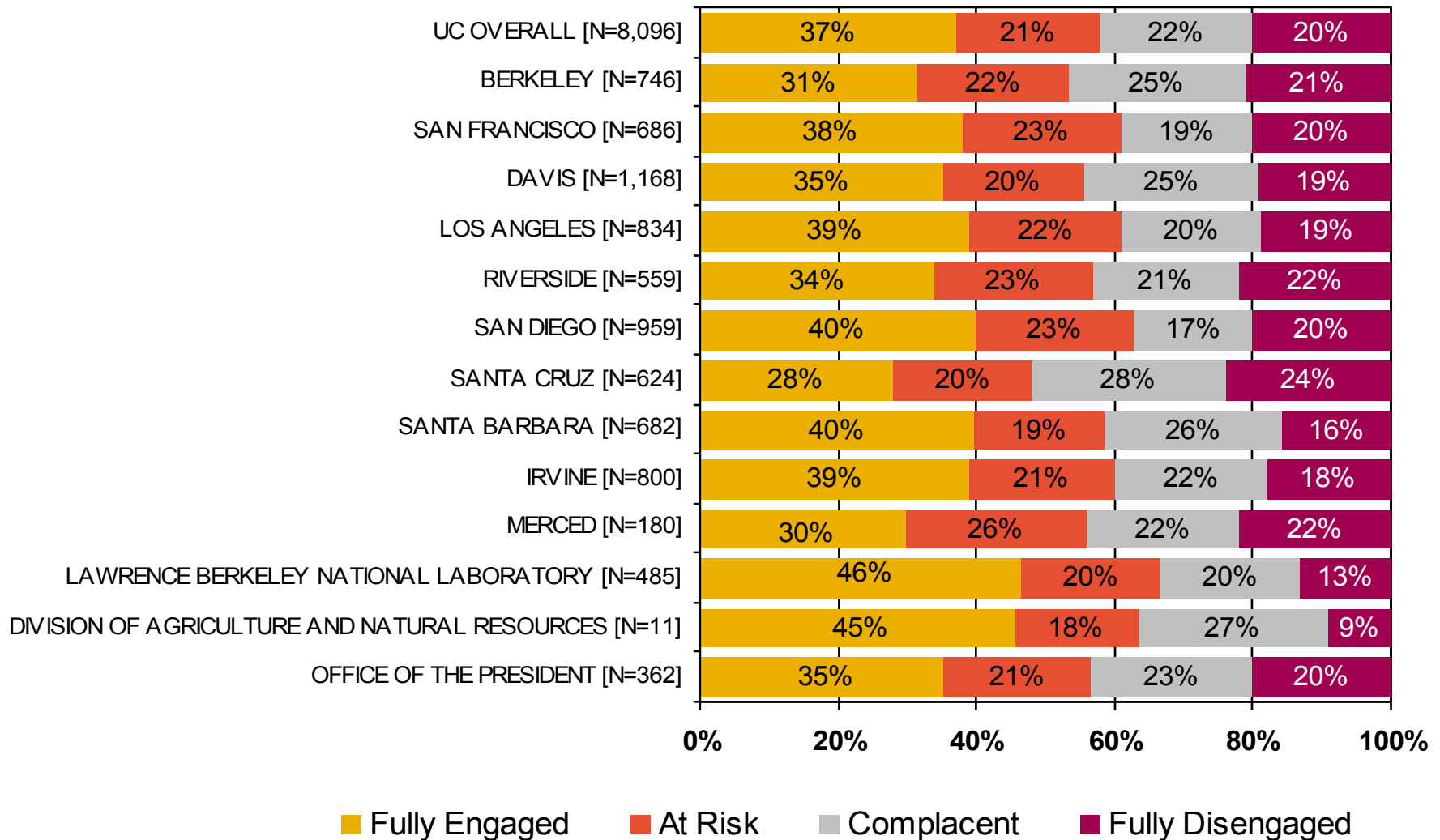
		vs. U.S. National Norm	vs. University Composite
A	B		
-4*	n/a		
-10*	n/a		
-7*	-7*		
-3*	-5*		
-14*	-14*		
+7*	+4*		
-5*	-11*		

Colored Cells indicate a statistically significant difference

Sustainable Engagement Profile (Cluster Analysis)



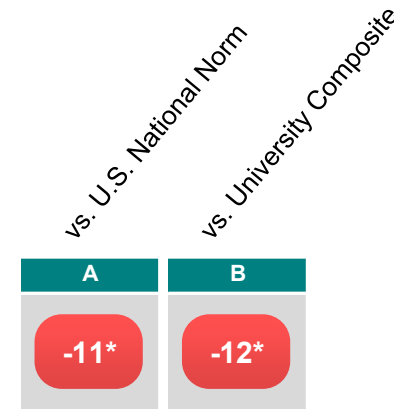
Sustainable Engagement Profile by Location



Retention Item

Comparison to U.S. National Norm and Global Universities Staff Composite

Items	Don't Know		
	Yes		No
29. At the present time, are you seriously considering leaving UC?	59	23	18



Observations on retention risk at UC:

- Locations: Certain campuses have notably higher risk than others
- Pay Ranges: \$150k-\$200k and \$200k+ (more definitive 'yes' responses)
- Tenure: 3-5 & 5-10 ('yes' and uncertainty); 25-30 & 30+ (more definitive 'yes')
- Gender: Males at greater risk
- Role and Ethnicity: No notable differences

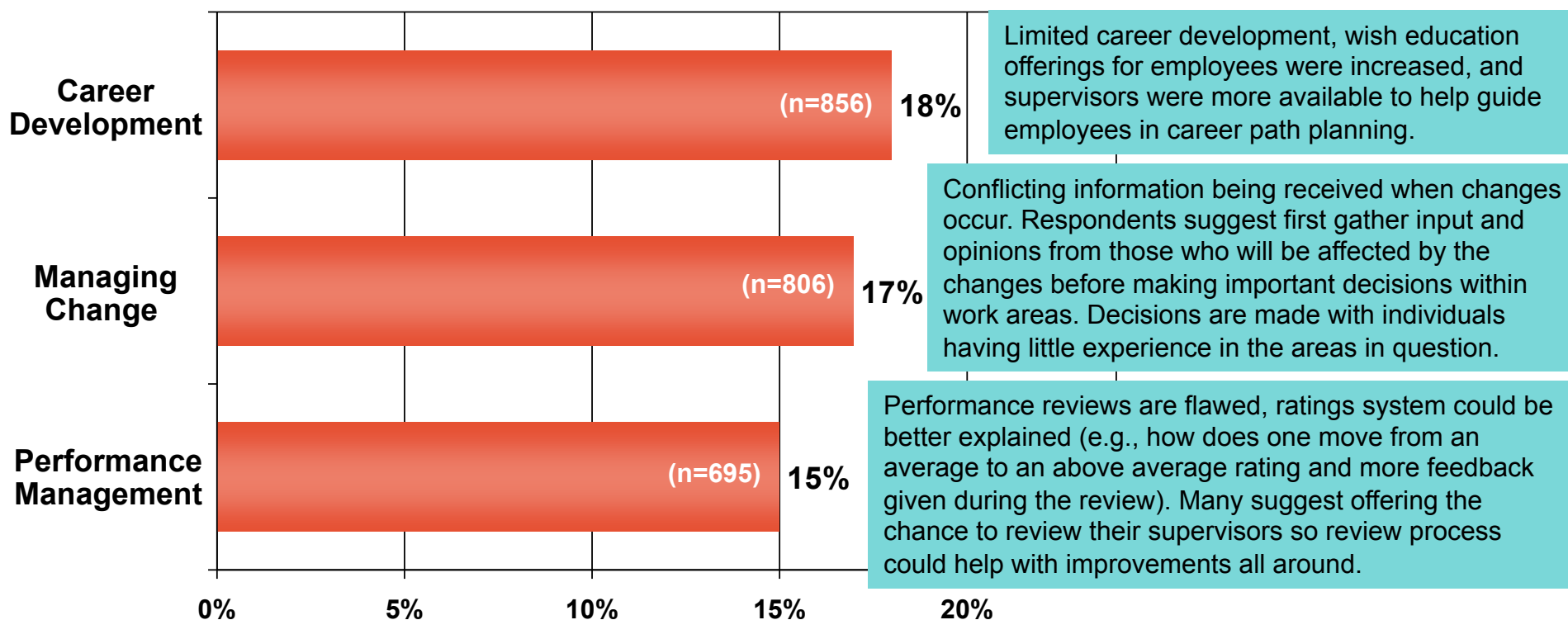


Written Comments

Comment Summary

What is the University of California's most significant unrealized opportunity? And how can we capitalize on it?"

Number of comments: **4,729 (58% comment response rate)**

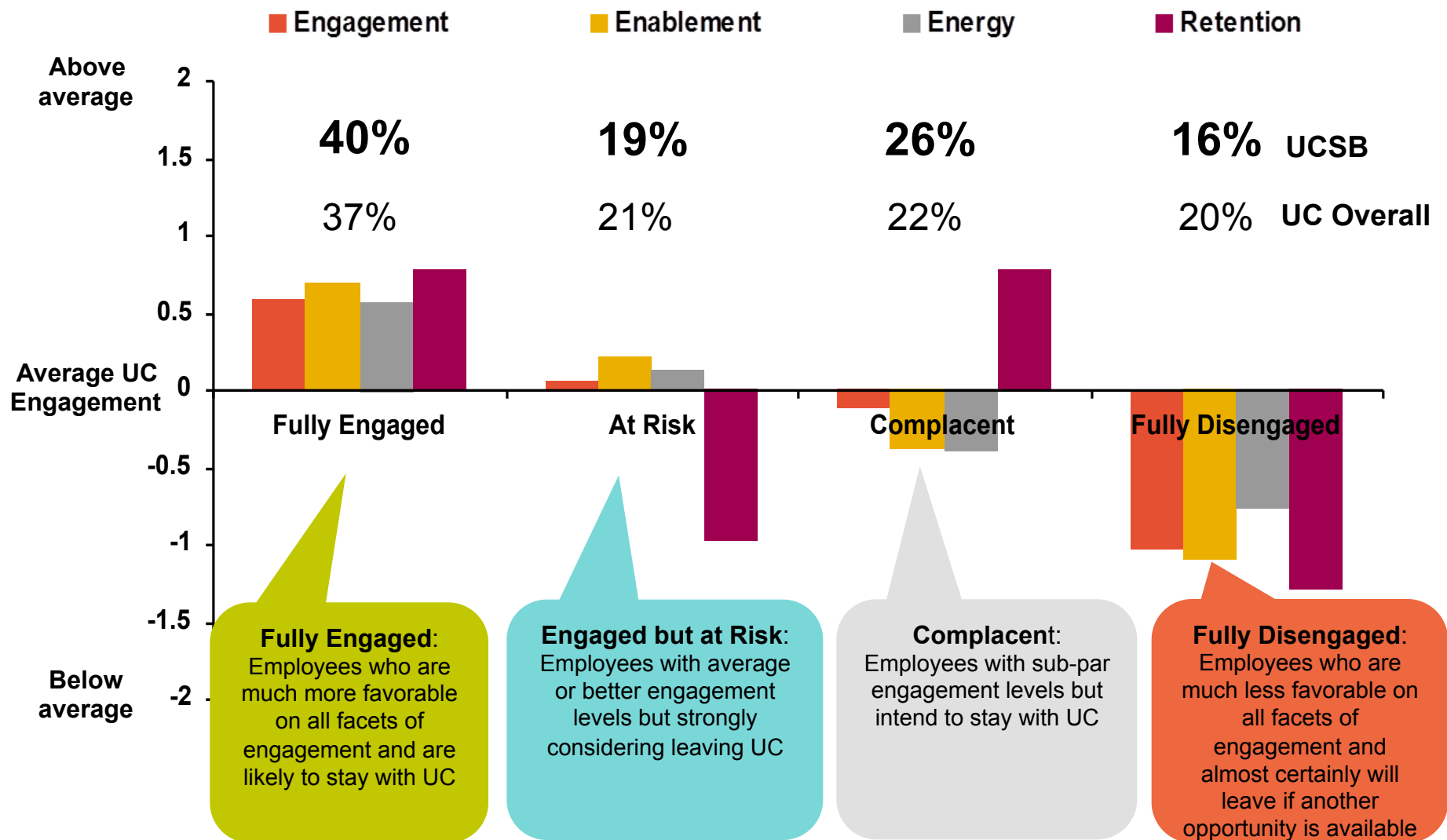


Local Results

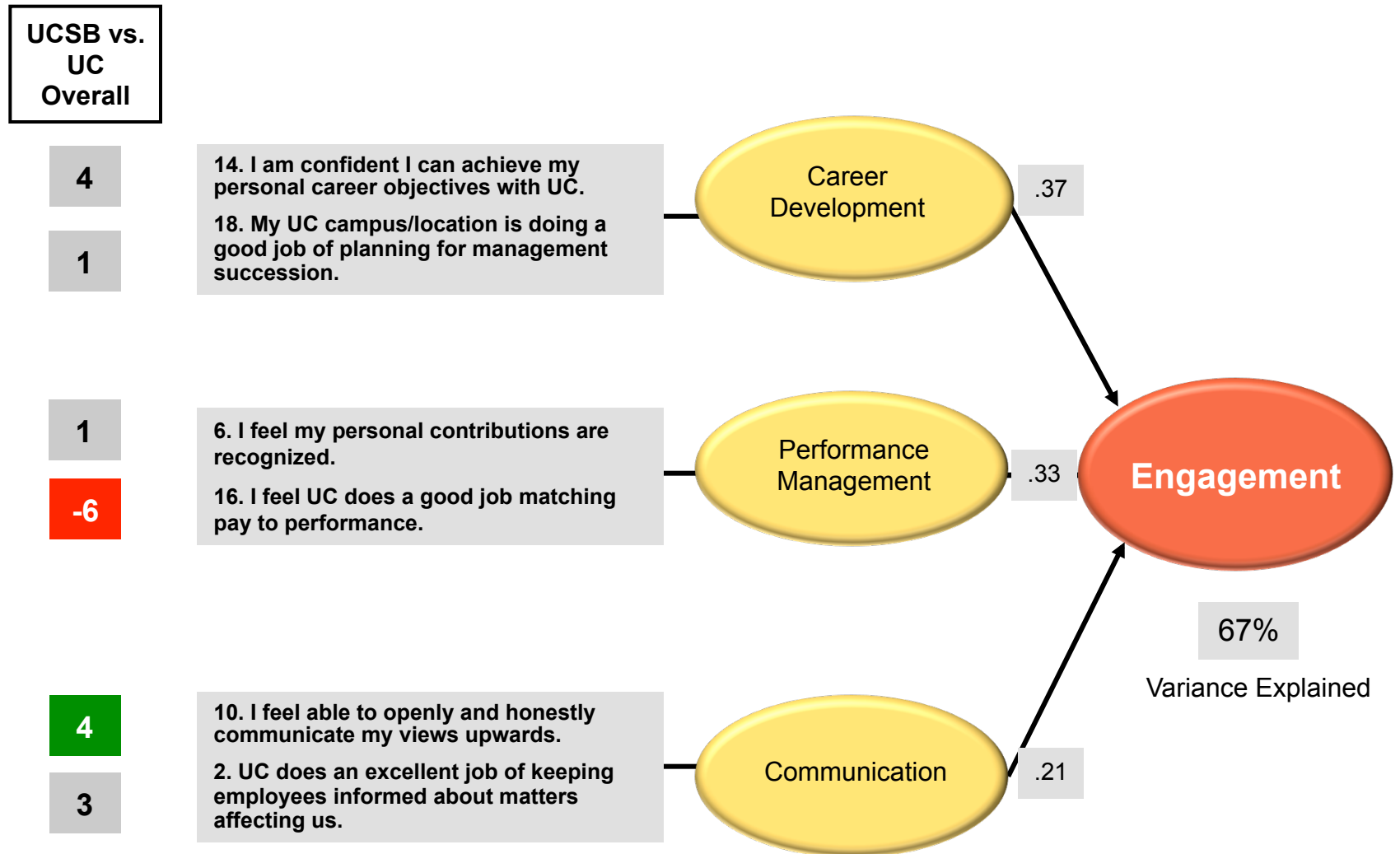
Key Messages — An Opportunity to Engage the Workforce

- UCSB employee **sentiment overall is moderately favorable** - most categories score somewhat above UC overall
- Some **positive signs of engagement** at UCSB — **more than 80% say**:
 - they are motivated to **go beyond their formal job responsibilities**
 - their **work schedule is sufficiently flexible** to meet their personal/family needs
 - **78% would recommend UC** as a good place to work
- Also perceived **positively** — **Supervisor relationships, opportunities for personal growth/development**, and **interdepartmental cooperation**
- **Opportunities for improvement** are suggested by certain engagement and retention “drivers” (per regression analyses performed):
 - Aspects of work life that relate most to **engaging UCSB employees**:
 - **Developing careers** — by planning and inspiring fulfilling careers at UC
 - **Recognizing performance** — informally and by matching pay to performance
 - **Involving by communicating** — keeping them informed through open and honest dialogue
 - Aspects of work life that relate most to **retaining UCSB employees**:
 - **Developing careers** (same as for engagement)
 - **Supervisor performance** – being responsive to suggestions, communicating alignment of jobs to department objectives

Sustainable Engagement Profile (Cluster Analysis)

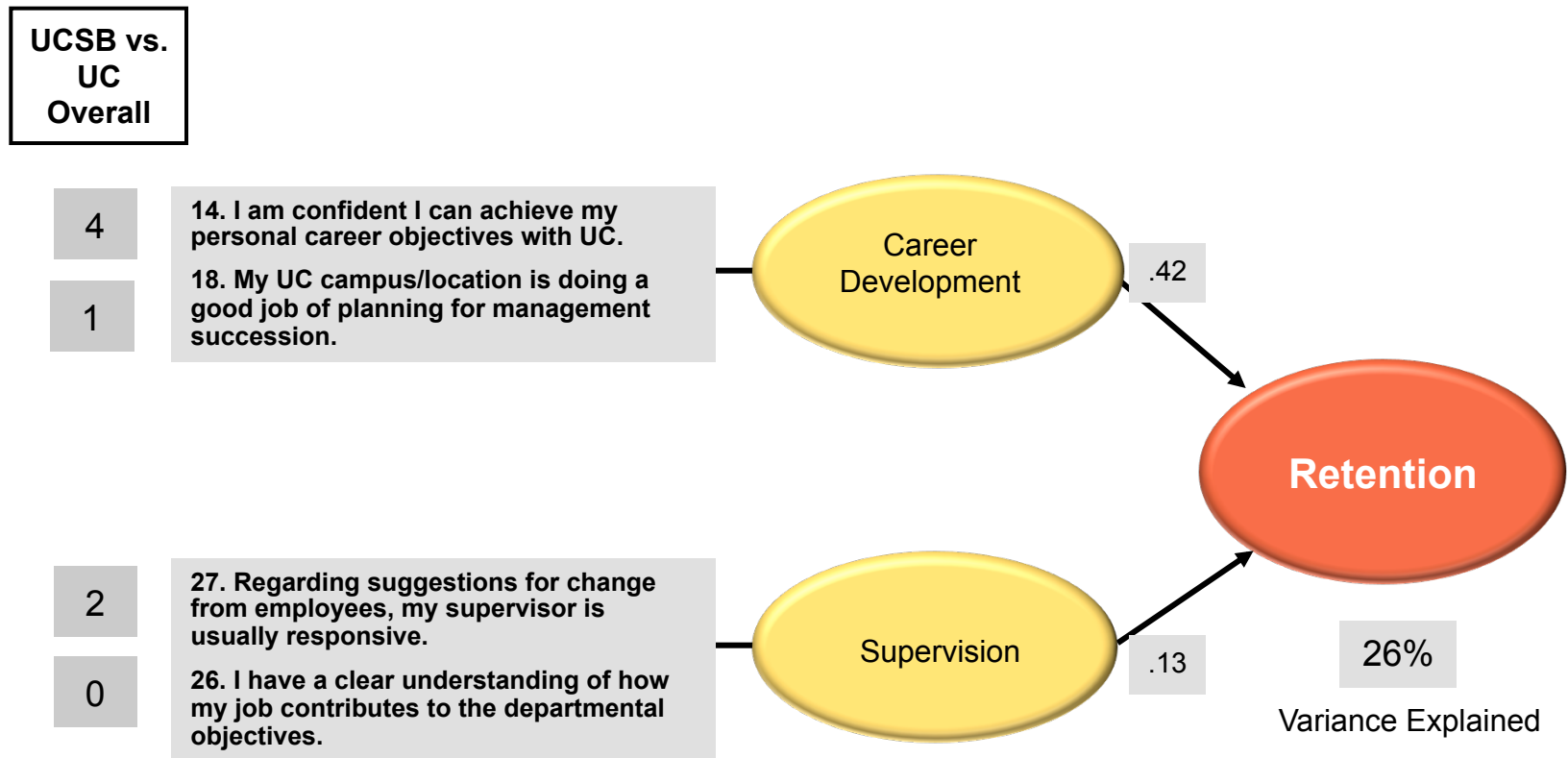


Key Drivers of Engagement at UC



Red/Green highlighting indicates a statistically significant negative variance from benchmark

Key Drivers of Retention at UC

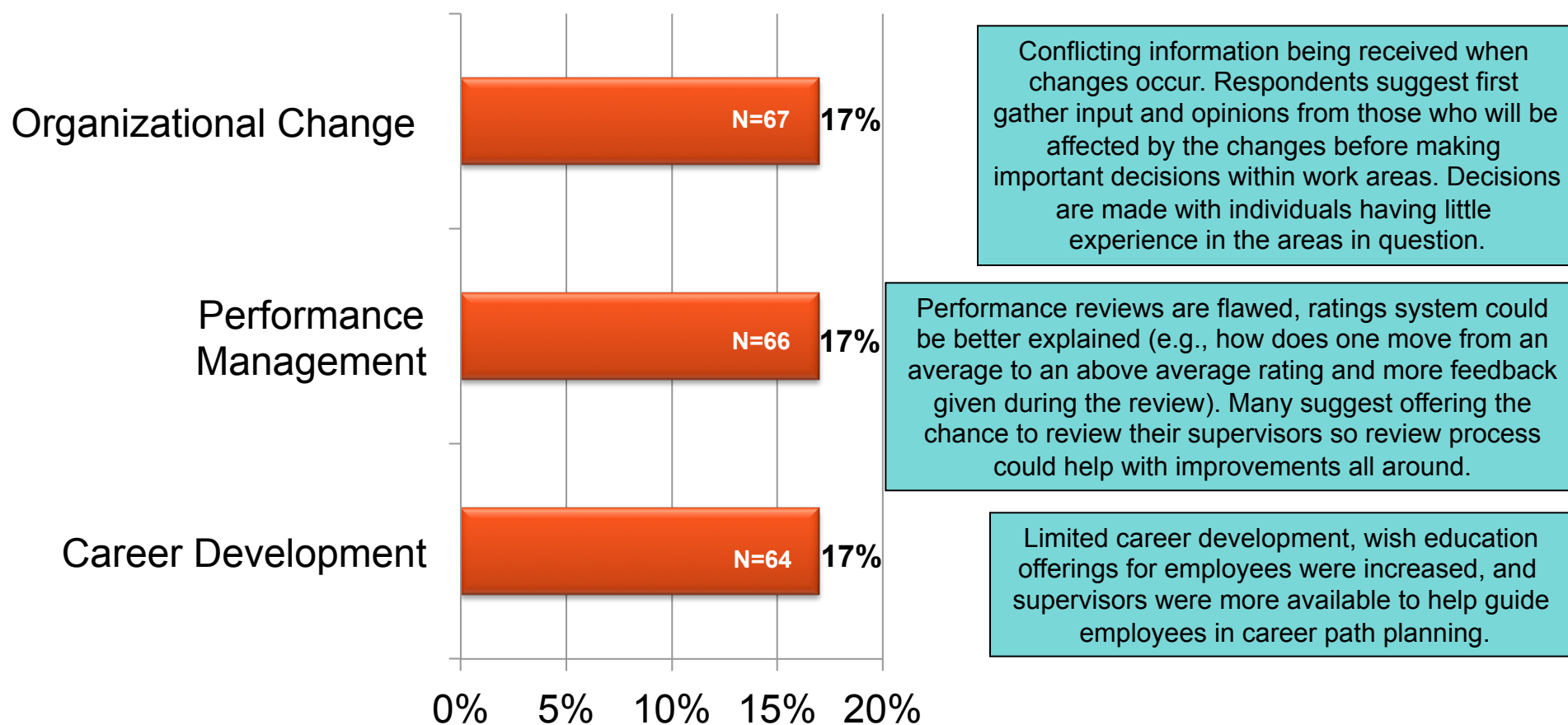


Red or green highlighting indicates statistical significance

Comment Summary

What is the University of California's most significant unrealized opportunity? And how can we capitalize on it?"

Number of UCSB comments: **386 (57% comment response rate)**



Strengths and Opportunities

Strengths on which to build:

- **Supervisor relationships**
 - treats with respect
 - listens to different point of view, encourages new ideas
- **Alignment**
 - 90% understand how their work aligns with departmental objectives
- **Work-life balance**
 - 84% report sufficient schedule flexibility to meet their personal/family responsibilities
- **Working relationships**
 - 74% report good cooperation between departments at UCSB

Strengths and Opportunities

Opportunities to address:

- **Area #1: Support of career development**
 - need more information and resources to manage own career
 - lack confidence career objectives can be achieved at UC
 - poor perception of management succession planning at UCSB
 - The strongest driver of engagement and retention
 - Third most popular topic in written comments
- **Area #2: Managing performance**
 - 3 out of 4 feel UC does not match pay to performance well, despite two-thirds majority view that their personal contributions are recognized and three-quarters majority view that performance is evaluated fairly
 - The second strongest driver of engagement
 - The second most popular topic in written comments
- **Area #3: Communication and Change Management**
 - Fewer than two-thirds say they can be open and honest sharing their views upward
 - The third strongest driver of engagement

Managing change

 - major pain point for many staff members, including managers and senior leaders
 - The most popular topic in written comments.

Opportunity Area #1: Career Development

WHAT WE'RE DOING ABOUT IT

- Gaucho U Certificate Program
- HR Academy
- Management Development Program
- UCOP Career Development
- Lynda.com campus subscription
- Revamped HR Website

WHAT MORE WE WANT TO LEARN TO PLAN NEXT STEPS

1. *What are some obstacles that are in the way of staff taking advantage of development opportunities, and what can we do to address those obstacles?*
2. *Are there certain audiences we need to better target?*
3. *Are there certain skill or development areas we need to better address through campus training efforts?*

Opportunity Area #2: Performance Management

WHAT WE'RE DOING ABOUT IT

- HR to pilot new performance management training classes this summer
- Revising the performance evaluation tool, and providing better training on how to use it
- Tying UC-wide core competency framework into training and performance evaluation framework
- Mandatory Supervisory Training Proposal

WHAT MORE WE WANT TO LEARN TO PLAN NEXT STEPS

1. *What are some strategies we could be encouraging supervisors to employ to better reward, incentivize, and acknowledge good performance?*
2. *What are some strategies that would help ensure Performance Evaluations are done consistently and timely?*
3. *What are some specific tools that supervisors need to be trained on, that would make them more effective at performance management?*

Opportunity Area #3: Communication & Change Management

WHAT WE'RE DOING ABOUT IT

- Created PMO Office with Full-Time Communications Specialist
- Developing S-List
- New Vision and Leadership in Public Affairs, which is Exploring New Vehicles for Targeted Communication
- Change Management role created to assist managers and employees understand the change process

WHAT MORE WE WANT TO LEARN TO PLAN NEXT STEPS

1. *What is the best way to get information to staff that don't log on every day?*
2. *What is the mechanism for staff that have issues or concerns, and who don't feel comfortable going to their supervisor to share concerns up?*
3. *Where do you see communication breaks down, or gets stuck flowing downward; what can we do about it?*

Table Discussion Exercise

There are nine tables with a discussion question assigned

- For your table discussion [15 min.]
 - Explore the underlying issues or causes related to this assigned topic
 - Brainstorm a set of strategies or steps that might address or resolve this question area
 - Out of the list of brainstormed items, prioritize the top 2-3 that our campus should consider implementing
 - Identify 1-2 key barriers or obstacles to implementation
 - Identify a presenter for 2 min. share out

- For Your Share Out [2 min.]
 1. *What are the top 2-3 strategies our campus should consider to address this key topic?*
 2. *What are the 1-2 key barriers or obstacles to implementation?*

Wrap Up and Next Steps [5 min.]

1. *Steps We Will Take*
2. *Steps You Can Take*
3. *Closing Comments*



Action Area Considerations and Next Steps

Action Area Considerations

- As you review your campus results, please consider these areas for focus, as they are consistently important to staff and lower than desired across the system:
 1. UC's support of staff development
 2. Involving & communicating
 3. Managing performance (esp. recognition)

Notable mention:

- We see **management of change** as a pain point for many staff members — just 33% of UC employees feel changes have been well planned and only 42% feel they have been well communicated. It is also #2 in written comments. We believe focusing on the above, especially involving & communicating, will help to address such concerns.

HR Strategic Plan - 2010-2014

Employee Relations and Policies Strategic Plan

Strategic Themes: Operate as an excellent employer

Mission: Build an environment of employee engagement, empowerment and involvement where people can offer their best; equip managers with tools, resources and a policy framework that facilitates an effective operating environment

STRATEGIES	SO THAT...	FUTURE IMPLICATIONS
<ul style="list-style-type: none">• Reorganize the functions, distinguishing ER from LR• Increase interface with non-represented groups• Have overall ER strategies lead Labor strategies	<ul style="list-style-type: none">• We continually improve our reputation with all employees• Increase employee engagement and satisfaction• Tap into the desire to drive productivity via discretionary effort• Acknowledge non represented as a key constituency	<ul style="list-style-type: none">• Sets the environment to attract and retain the best• Maintain a degree of operational flexibility via the non represented population• Drives productivity by increasing satisfaction and engagement