INTERNAL COMMUNICATION

Communication Essentials

Why We Need Good Internal Communication

Any successful organization needs good internal communication. It is essential to:

- Improving efficiency (productivity, effectiveness, avoiding double work…)
- Ensuring quality services (get information, give advice, give instructions…)
- Providing important intangibles (goodwill, morale, motivation, harmony…)

How do you go about identifying when something needs to be communicated and how?

The type of communication you use depends on the circumstances. You use different communication methods and tools depending on:

- Purpose
- Urgency
- Need for record (may vary according to role of communicator & recipient)
- Need for follow-through
- Need for reminders
- Best/preferred method of reaching audience
- Need to copy (cc) multiple people

In this section:

How We Communicate

For this type of communication:	We use these methods, both consciously and unconsciously:		
	Verbal	**Mixed Verbal & Non Verbal**	**Non Verbal**
Informal	Oral, Casual Written-text, i.m.	Action/Non-action	Facial expressions
Formal	Written	Charts, Photos with captions	Handshake Facial expressions

Why Communication is the first section in this Guide

In 2011, AS adopted a Five Year Strategic Plan. Internal Communication is identified in the plan under Culture Goals, which are defined as "organizing principles, values, history and practices." Communication appears first in this guide as good internal communication is recognized as a key value and principle required to ensure success in the work AS does, and this guide is designed to codify good communication practices that are key to:

- Giving and getting clear instructions & direction
- Increasing effectiveness
- Improving productivity
- Avoiding duplicate work
- Dispelling rumors or misinformation
- Sharing knowledge
- Keeping & learning from institutional memory
- Achieving shared vision
- Increasing harmony
- Improving morale
- Creating clear expectations
- Avoiding disaster

Communicating the Basics: Logistics and Duties

Who Does What and How to Reach Them

This is the most basic information we communicate; we cannot function if we do not communicate this information and communicate it effectively.

Logistics includes:

- Where to find staff in general (office location)
- Where to find staff in real time (where are you right now?)
- When is the best time to reach you
- What is the best way to reach you:
    - Urgent Matters
    - Non-urgent Matters

Duties include:

- Basic job responsibilities in context with others at AS and within UCSB
- Who advises whom
- General and specific areas of expertise
- Who has institutional memory- this should be listed on the website under individual's special knowledge, as it is can be based on former positions held.

METHODS OF COMMUNICATING LOGISTICS and WHAT WE DO

	Where I am	How best to reach me	What I do	Where to find staff in general
Signs				√
Office Status Boards	√	√	√-brief	
Website		√	√	√
Social Media Site(s)			√	√
iCal	√			
Phone (Voice Mail)[1]	√	√	√-brief	
Email[1]	√	√- sig. line: job title & best way to reach you		
Text Messages[2]	√	√		
Meetings		√	√	√

[1] Only if it is recipient's preferred method
[2] Only if you and recipient have agreed that this method works for you in a work context. You are using private equipment when you text. Must follow-through with more formal written communication when needed…same as crossing paths, it lacks permanency.

√ **Your Communication Preferences:**

Each year in August (or more often if there is a change in assignments) staff:

- ☐ Checks their AS web presence and submits needed changes to IT staff
- ☐ Checks their phone message and records appropriate changes
- ☐ Checks their email signature and makes applicable changes

"First learn the meaning of what you say, and then speak [or write]."
-Epictetus, Greek Philosopher

"The single biggest problem in communication is the illusion that it has taken place."
-George Bernard Shaw

Tools for Communication

There are many tools we use to aid in communication, but as anyone who receives over one hundred emails a day knows, the tools can become a hindrance if misused. The following table lists communication tools and AS' methods for using these tools to improve communication.

TOOL	USE IT:	DOS & DON'TS
Email • Written • Can be Formal or Informal	• If it is the recipient's favored method • If you want a written record • If you need/want to reach more than one person with a single message • Option to be able to see one another's responses • Option to forward results/answers • Opportunity to be very clear and detailed if necessary • If you need to attach an electronic file	**DO** • Use descriptive subject lines (people get a lot of emails, help them understand they need to read yours and follow the thread) • Include your regular working hrs; how best to reach you (if not email) and how often you check messages in signature line • Leave urgent messages only when it is the recipient's favored method • Try to respond to emails within 24-48 hrs (even if it's just to say you're swamped but got message and will reply) • Learn when to use "reply" and when to use "reply all" **DON'T** • Put off answering when a brief (less than a minute) reply is in order
Email CCs	• To include people in a conversation	**DON'T** • Copy every email in a thread to anyone who only needs the outcome of a conversation—it clogs their email box. • Use blind copies (the BCC field) on emails in a professional context except under the following circumstance: ○ The people you are blind copying need to see the originating email, but will not want any of the reply emails. In this case, you should list the BCCs at the bottom of the email as you would list CCs in a printed letter. This ensures the written record is clear and lets the recipients know who else is seeing the correspondence. • Use BCCs to keep secrets, gossip or embarrass.
Email Lists • Written • Formal	• To reach a discreet group of people who should all receive the same message at the same time	**DO** • Use the right list (be familiar with the choices and choose wisely) • Use conservatively. There are some communications that will always go to certain lists: minutes, agendas…. Be careful not to overuse or you risk oversaturation. **DON'T** • Send to a group when you really only need to reach one or two people in the group. Use common sense • Use lists for non-UC related business
Voice Mail (AS Land Lines) • Oral • Informal	• If it is the recipient's favored method • If you want to be more personal • If you need voice inflection to get your point across • If the question/answer/information is more easily explained orally • If you do not need a written record	**DO** • Include regular work hours, how best to reach me (if not VM) and how often you check messages in recorded message • Leave urgent message only when recipient's favored method • Use extended absence greetings • Rule: If this is your favored method: respond to voicemail within 48 hrs (even if it's just to say you're swamped and give some idea of when you'll reply)

<table>
<tr><th>TOOL</th><th>USE IT:</th><th>DOS & DON'TS</th></tr>
<tr><td><u>Text Messaging*</u>
• Written-but acts like Oral
• Informal

NOTE: You do not have to use your personal phone for work use, and you cannot be reimbursed for charges if you voluntarily use your phone for work.</td><td>• For work purposes: only for urgent messages unless otherwise specified by recipient, and then:
○ to convey simple messages
○ when you do not need a record
○ when it is the recipient's favored method
○ when the recipient will not otherwise get a message (e.g., they are out of the office and need to know of a change in plans)</td><td><u>DO</u>
• Follow-up with email or documents when a more formal record is required or when others need to know the content of the exchange
• Respect off-hours as this is especially invasive (think of phones used for alarm clocks)
<u>DON'T</u>
• Use your personal phone for work if unless you want to
• Give out your private cell number, or, if you do, set clear limits
• Respond via text if you receive an unwanted, non-emergency work text. Instead respond during normal business hours via email or phone and gently remind recipient of the best way (and hours) to reach you</td></tr>
<tr><td colspan="3">NOTE Many people are plugged-in 24/7 through a variety of devices. Students, who do not have "regular work hours" and staff who may be trying to catch up, or who do not mind working outside of work hours, may send emails, phone messages or texts out side of work hours. Unless it is otherwise specified in your job description, you do not need to reply to these outside of work hours. You may politely let co-workers or students know that you will get back to them the next working day, or you may simply wait until the next working day to reply. If you do decide to reply outside of work hours on one occasion, you do not have to make it a regular practice.</td></tr>
<tr><td><u>iCal</u>
• Written
• Informal</td><td>• Use <u>group calendar</u> to set the following meetings:
○ Standing meetings: management, team, group
○ Process meetings and other mtgs other staff may wish to attend
○ Trainings
• Consider when appropriate use <u>internal calendar</u> to set a meeting, but send an email letting people know about the meeting (use this for <u>FYI</u>)
• Use <u>holiday calendar</u> to schedule vacations or other planned absences</td><td><u>DO</u>
• Enter all appointments, meetings, vacations, even block out time for project work so others can use that information to find your availability. Note that others cannot see your appointments—only that the time is already accounted for.
• Optional: Use web-based version of iCal to report unexpected absence of a day or more? Exploring choices.</td></tr>
<tr><td><u>Office Status Boards</u>
• Written
• Informal</td><td>• To list your regular hours in the office
• To state when you'll be back
• To let others know of an unusual circumstance (e.g., "I'm in meetings in the UCEN 9-3 today")</td><td><u>DO</u>
• Use this really simple, but elegant way of communicating where you are and when you'll be available either for face to face or for reading emails and receiving land line calls.</td></tr>
<tr><td><u>Shared Internal Twitterfeed</u></td><td>• Sharing status updates, reminders, <u>FYIs</u></td><td><u>DON'T</u>
• Post anything confidential or personal
• Supplant email</td></tr>
<tr><td><u>Social Media</u>
• Written
• Informal</td><td>• To keep interested students and others in the community abreast of AS activities</td><td><u>DO</u>
• Keep it updated—daily!
• Keep it topical & appealing
• Make sure you share info from across AS—keep it broad
• Provide links to website(s) & favorites
• Have at least one AS staff member as an administrator
• Register with as AS account
• Tell AS webdev any passwords
<u>DON'T</u>
• Let one group or a small number of groups dominate</td></tr>
</table>

TOOL	USE IT:	DOS & DON'TS
Websites • Written • Formal or Informal	• To help student find: ○ Staff, BCCs, Services, Jobs ○ Elections Info ○ KCSB ○ Many ways to get involved ○ Changes to current staff and advisors ○ Upcoming events & meetings ○ Mission statement and goals on staff page ○ Minutes ○ Forms ○ Student employment opportunities ○ Awards and other special information	**DO** • Remember that unlike email, with which we can contact people or groups, our website relies on people coming to us, so we need to provide the kind of information people would be looking for… • Include How best to reach you: urgent - non-urgent - work request - FYI; and include regular work hours • Establish agreed upon guidelines for updating web info (some groups such as KCSB update their own sites, others rely upon the web dev team) • Encourage use by making sites more user friendly from a content generator's and from a general user's point of view so everyone can use it as a resource and… • Keep information up-to-date • At least every August, check and update your AS staff page profile. This is the students' primary source for information about your role and contact information. Make sure it is up to date.
Crossing paths • Oral • Informal	• …It happens, it's nice, just remember to follow-through	**DO** • Ask yourself: Does anyone else need to be brought in or informed? • Follow-up with email or docs when record required
Document Sharing & Collaboration • Written	• Collaborative editing vs. read-only file distribution. • UC is selecting a standard document sharing software in 2012. • AS students currently use Google Docs	**DO use document sharing for:** • Agendas • Working Documents • Contact Information **DON'T use document sharing for:** • Legal or other confidential correspondence or forms
Team Meetings • Oral • Generally informal, can be formal	• To establish a good rapport between manager and staff • To keep staff informed of team and AS-wide news • To ask staff for their input on projects/plans • To prepare FYIs for the next staff meeting • To control or avoid rumors by keeping communication timely, regular and consistent.	**DO** • Hold team and/or team meetings at least every other week, at a set time. • Require attendance and participation at team meetings. • Discuss what to bring from area to staff meeting **DON'T** • Regularly cancel meetings; staff feel less important than whatever else you are doing
Management Meeting Announcements • Written • Informal	• To increase trust and reduce mystery • To share issues of broad interest • To share management info with single voice—everyone gets the same information, and in a timely manner	**DO** • Consider sharing non-confidential items on management agenda and possibly through post meeting management announcements • Read them, at least now & then. If someone is going to the trouble of typing them out…they will want to know if anyone is reading them and if it is helping with communication. Let them know if they are so cryptic they are making it worse!
Staff Meetings • Oral • Generally informal, can be formal	• To share information • To make decisions together, when applicable	**DO** • Follow communication standards for FYIs, Outcomes and Decisions…
Staff Meeting Minutes • Written • Informal	• To share consistent written info • To provide a record of discussion & decisions for those who do not remember details or missed meeting	**DO** • Read staff meeting minutes, especially if you missed the meeting, but also if you were confused about any aspect of the discussion. Then, if you still have questions, ask your manager (or other person if identified in minutes)

Conduct and Conflict Resolution

Communication usually goes well. Consider that people talk and write all day long, and most of that communication is clear and appreciated. When it is not, it can often be cleared up quickly and easily with further communication, a phone call or a walk down the hall. However, when communication goes awry feelings can get hurt and confusion can ensue. Therefore, AS has examined ways to handle problems when they arise and has agreed to a **common code of conduct:**

- No physical contact: be aware of people's physical boundaries
- Be sensitive/cautious with references to gender, sexual orientation, race, physical attributes or personal property, even if intended as compliment or in jest
- Be mindful of language, tone and context
- Treat people the way you would like to be treated, or better, to the best of your abilities, the way *they* would like to be treated
- Share sensitivities; be honest when something comes up
- When someone shares a sensitivity, do not respond defensively: keep your mind open
- Take responsibility for your actions; think about how your actions will be perceived
- Do not use students to take sides or create division
- Don't interrupt. Instead write it down & wait your turn
- Be courteous regarding cell phones

POTENTIAL COMMUNICATION PROBLEMS and HOW TO ADDRESS THEM

Problem:	How To Address:
• Someone says something inappropriate in a group meeting	• Acknowledge that it was inappropriate. Even if you (manager, facilitator) were not personally offended, acknowledge that others might have been. • Use the opportunity to train, either in the moment or afterward depending on the situation.
• You are friends outside of work, and your friend is being too casual at work	• Too casual behavior in the workplace can be uncomfortable for the recipient and can be misinterpreted by outside observers • Remind them that you feel more comfortable being more professional in the workplace. Give examples.
• Chronic Interrupters	• Supervisor should speak with them privately • Facilitator can gently ask them to wait
• Non-sequiturs	• Facilitator can gently tell this person that there is limited time on this topic, and invite them to place this other topic on a future agenda or offer to talk to them about the other topic later.
• Gossip	• Everyone has a responsibility to question or identify gossip vs reality. It is often simply a matter of calling it by name—this reminds people what they really know (facts) and what is speculation.
• No matter how much is written or said, some people do not follow procedures	• It's true. Some people don't. Some people don't just once or twice, possibly even for good reason. Some people don't chronically. Continue to remind them of process as applicable, but also bring to the attention of your supervisor.
• Having some difficulty with your supervisor	• Talk to your supervisor about it, OR • Talk to a non-direct supervisor • Talk to supervisors' supervisor • Represented employees have a grievance procedure • Campus has an ombudsman's office • HR has a program called ASAP
• Problem with a co-worker	• Talk to your supervisor about it, OR • Talk to a non-direct supervisor • Talk to supervisors' supervisor

Conflict Resolution Training

The most effective way to practice conflict resolution is through role playing. AS staff has completed Conflict Resolution training in the past, developing their code of conduct at one such training.

Consider using this tool occasionally at team meetings or even staff meetings. You can demonstrate a team exercise that went really well, for example, or invite someone to produce a role-play skit using an example you experienced in another setting. Adding comic relief can help everyone learn from mistakes or misadventures.

To Manage a Conflict with Another Person

1. Understand yourself:

- We often do not like in others what we do not want to see in ourselves, so understand what you do not like about yourself, early on in your career.
- Realize that how you grew up (family) and your culture can affect how you view conflict.
- Write down traits that really bug you when see them in others.
- Be aware that these traits are your "hot buttons." Learn to recognize them and control yourself when they arise.
- Be aware that what you view as conflict may not seem that way to others.

2. Manage yourself. If you and/or another person are getting upset, then manage yourself to stay calm:

- Speak to the person as if the other person is not upset – this can be very effective!
- Avoid use of the word "you" – this avoids your appearing to be blaming the person.
- Nod your head to assure the person that you heard him/her.
- Maintain eye contact with the person—without staring them down!

3. Move the discussion to a private area if possible and/or necessary.

- Many times, moving to a new environment invites both of you to see or feel differently.

4. Give the other person time to vent.

- Do not interrupt the person or judge what he/she is saying. Listen and identify the elements that are work related. These are the issues to which you can respond.

5. Verify that you are accurately hearing the other person. When they are done speaking:

- Ask the person to let you rephrase (uninterrupted) what you are hearing to ensure you are hearing it correctly.
- To understand the person more, ask open-ended questions (avoid "why" questions – those questions often make people feel defensive).

6. Verify that the other person is hearing you by repeating step #5, above. To clarify your perspective:

- Use "I", not "you."
- Talk in terms of the present as much as possible.
- Sometimes you may quickly mention your feelings, but it is not always appropriate, particularly if you are the supervisor or manager.

7. Acknowledge where you disagree and where you agree.

- One of the most powerful means to resolve conflict is to mention where you both agree.

8. Discuss the matter on which you disagree, not the nature of the other person.

- Ask "What can we do to fix the problem?" The person might begin to complain again.
- Then ask the same question. Focus on actions you both can do.
- Acknowledge things you cannot fix (outside of your power).
- Ask the other person if they will support the action(s).
- If the person will not, then ask for a "cooling off period".

9. Thank the person for working with you.

- It takes patience for a person to engage in meaningful conversation during conflict. Acknowledge and thank the other person for his/her effort.

10. If the situation remains a conflict, then:

- Conclude if the other person's behavior violates one of the personnel policies and procedures in the workplace and if it does, then follow the policy's terms for addressing that violation.
- Otherwise, consider whether to agree to disagree.
- Consider seeking a third party to mediate.

Original Source: Carter McNamara, MBA, PhD, edited by AS Internal Communications Committee 10/2011

Communicating Our Work

AS' work: what is it, how is it done, our expectations, how frequently, how quickly, how to ask for input, whom to ask for input, how and when to respond to requests for input, brainstorming, knowing when you need input/authorizations/approvals…there is a lot to communicate in our work every day.

Job Duties and Special Assignments

All staff have regular assigned work, and most job descriptions include the phrase "other duties as assigned." Job descriptions also convey the level of supervision expected for certain duties, e.g., "under close supervision," or "under general supervision." The level of supervision describes how independently staff are expected to work once they have been trained. The supervisor is always responsible for ensuring staff are properly trained to complete their regular assigned duties at the applicable level of supervision. Supervisors are responsible for conveying the regular duties and the special assignments that inevitably arise.

When you self-assign a special project, you must communicate all of the project information to your supervisor and ensure you have authorization to proceed.

And if you are given a project from someone other than your supervisor, be sure you determine whether you or the assignor will fill your supervisor in on details.

√ Job Duties & Special Assignments Communication Checklist

During first month of employment, supervisor and/or designee:

_____1) Communicates, using job description, written procedures, training programs and oral explanation:
- _____a) Regular duties: daily, weekly, monthly, quarterly, annual
- _____b) Communication tools & uses
- _____c) AS technology & resources
- _____d) Workflow in assigned group
- _____e) Reporting requirements
- _____f) Expectations

Periodically, supervisor:

_____2) Gives a special assignment, explaining:
- _____a) What it is (very clearly…all aspects: vision, goals, objectives, scope, expectations)
- _____b) Priority, especially as relates to other duties, assignments, and workload
- _____c) Discretion and accountability:
  - _____i) Who is the project lead
  - _____ii) Project decision-making scope
  - _____iii) Who is responsible for final product
- _____d) Level of confidentiality, if applicable
- _____e) Tools
- _____f) Overtime, comp time, if applicable
- _____g) Measurement and reporting requirements
- _____h) May also explain, or may ask the assignee to determine some or all of the following:
  - _____i) Activities
  - _____ii) Other participants and their roles
  - _____iii) Budget
  - _____iv) Timelines (internal and external)

Throughout the year, supervisor:

_____3) Checks in with staff to ensure they understand duties, assignments and expectations

_____4) Communicates any changes in duties, assignments or expectation

_____5) Would like to pursue professional development, to improve or expand performance

Throughout the year, staff:

_____6) Checks in with supervisor if they:
- _____a) Do not understand any part of job duties
- _____b) Are unclear at any time about expectations

Throughout the year, advisors and web team:

_____7) Remind students to notify & web team if they:
- _____a) Change roles
- _____b) Create or change any processes

Once a year, supervisors:

_____8) Complete staff evaluations.

_____9) Review special assignments to determine whether they have become new longer term duties

Supervisors and Project Leaders: When Your Instructions Are Not Followed…

1. Check your instructions; do you think they were clear?
2. Sit with the person or group to whom you gave instructions. Did they understand them as you intended?
    a. If instructions seemed clear, why didn't they follow them?
        i. If for good reason, they still should have contacted you
        ii. If not for good reason, set future expectations with consequences. Under some circumstances, initiate consequences at this time.
    b. If not clear, there are usually two options:
        i. They thought they understood (i.e., they read them differently than you intended).
            1. Upon rereading, you can understand how they misunderstood. You both can talk about how you will avoid this miscommunication in the future.
            2. Upon rereading, you cannot discern how that happened. You may want to consider some combination of training, other communication methods or role changes.
        ii. They understood the instructions, but acted differently anyway.
            1. In retrospect, you understand why they acted as they did and possibly even agree with their alternative. Discuss appropriate avenues to have this conversation before they ignore or deviate from your instructions.
            2. You disagree with their alternative. It does not meet the goals/objectives of the assignment. You may want to consider some combination of training or role changes. There may be consequences now; there will be consequences in the future if it happens again. Walk through the different scenarios in this box and explain why this one is the least acceptable.

Approvals and Authorizations

Approvals and authorizations are specific job duties. Your supervisor may require authorization before you complete certain steps in a process, or a specific individual may have to issue approval before you can move forward, e.g., contract or requisition approval. A group, such as Senate or Finance Board, may also have approval power over aspects of your work, e.g., funding a project or changing the legal code.

To know whether an approval is needed, follow procedures throughout this guide or those specified in your job manual.

√ Approvals & Authorizations:

Persons asking for approval:

- Ensure you are submitting all of the information the approver needs to make an informed decision
- Submit items for approval within required time limits to ensure you will get your answer in a timely manner

Person making the decision:

- Look over submitted materials when you receive them to ensure you have all required submittals; if you do not, immediately send an email to the requestor so the outcome is delayed as little as possible
- Once you start looking in depth at the submittal, if there are incomplete materials, again, send an email immediately…
- If there will be a time delay, notify the requestor as soon as you know and give a revised time estimate if possible, e.g., 'if you send me the missing calculations by tomorrow, I can get you a decision by___.'

Also see Outcomes and Decisions, below

Input, Feedback and Consultation

Input and feedback are natural parts of the workplace. Consultation is commonplace in a work environment such as AS where staff are working on different projects each quarter and each year and working with new students all the time. For some, seeking and giving input are part of everyday duties; others will only occasionally seek or give input, but whenever it is part of your work, think about these guidelines:

- Know when/who it is appropriate to ask for input.
- Beware of asking too many individuals. For example, if you want comments from a BCC, ask for the BCC to give you a single response. You do not want responses from several members of the BCC, particularly if they conflict!
- Always document your communication, use email, so requests and deadlines are recorded.
- Use clear subject lines including topic & deadline (or at least indicating that there is a deadline.)

NOTE: Understanding roles is important. Occasionally an individual who gave feedback may want their feedback treated as approval, in other words, they may not want you to move forward unless you incorporate their changes. However, unless they have approval power, you and your supervisor decide whether you must include feedback or simply consider the feedback.

√ Input/Feedback Communication Checklist

Whenever requesting information, feedback or input, all AS staff and students:

_____1) If via email, use a very descriptive subject line so recipient knows there is a request and a deadline

_____2) If not via email, follow-up with an email to create paper trail of request and deadline and to remind recipient.

Within 48 hours of any request for input (less if urgent), all AS staff and students:

_____3) Respond to requests for information, feedback or input if only to let requestor know that you will not be able to help

_____4) Notify your supervisor when:

  _____a) The request is outside of your regular duties

  _____b) Time commitment will/may derail other timelines

  _____c) You need advice regarding the content of your response

POTENTIAL INPUT & FEEDBACK PROBLEMS and HOW TO ADDRESS THEM

Problem :	How To Address:
• Poor quality response	• Use the opportunity to train • Restate the inquiry in another manner (perhaps you were not understood) • Ask again this time use an example • Explain the consequence • Face to face meeting? • Talk to that person's advisor/supervisor, if appropriate and necessary (is this chronic, critical?)
• No response	• Ask again, explain the consequence; if this is last request…so note • Move forward without the response • Face to face meeting?
• Too many differing responses from one group	• Ask the group to make a single recommendation (easiest if you anticipate this and head it off…)
• Late response—you have already moved on	• Go back & try to include what is still relevant • Return the response explaining that it was late (always send this with original deadline attached) and inviting them to review the next version/step, if applicable • Move forward without including the response; politely tell the respondent that you are doing this and why
• Someone joins a project that is well underway and wants to give input	• Assign someone to catch them up • Listen to their feedback, even if it is on issues you have already moved past • Determine whether to reopen closed issues based on comments

Outcomes and Decisions

Outcomes/decisions are one of the more difficult areas of communication. It is human nature, and a significant part of AS' culture, to foster involvement, participation, even activism. So when managers, or committees take action and announce decisions, they must take care to ensure that AS' culture has been considered.

The first step to successful decision-making is ensuring that you have been very clear both about:

a. Who has decision-making authority for any given topic/assignment/work product, and
b. What is the scope of that decision-making authority?

It is also important for all AS decision-making to consider whether and what role students have in the decision-making process. Always leave sufficient time to obtain student approvals where needed.

NOTE: Delegated authority can always be rescinded, but it should neither be given, nor be rescinded lightly.

Also see Components of Successful Decision-Making and Communication, below

√ Outcomes and Decisions Communication Checklist

Prior to making a decision, decision-maker:

_____1) Determine whether there are any overlapping authorities or decision-makers. If yes, coordinate with these individuals/groups.
_____2) Consider internal effects of decisions or outcomes on
- _____a) Students
- _____b) Cost
- _____c) Structure
- _____d) Personnel
- _____e) Space
- _____f) Policies
- _____g) Procedures
- _____h) Workload
- _____i) Strategic Plan

_____3) Consider external effects of decisions or outcomes on
- _____a) Policy
- _____b) Publicity
- _____c) Stakeholders

_____4) Determine whether to adjust the decision based on all of the above considerations

After making a decision, decision-maker:

_____5) Create a communication plan to determine order and message for communicating to each stakeholder
- _____a) List: who do you need to communicate to:
  - _____i) Students
    - _____(1) BCCs
    - _____(2) Execs
    - _____(3) At Large
  - _____ii) Staff
  - _____iii) Office of Student Affairs
  - _____iv) Human Resources
  - _____v) Union(s)
  - _____vi) Other UC
  - _____vii) Other public agencies
- _____b) Order in which you will communicate
- _____c) Method of communication
- _____d) Who will communicate what
- _____e) Post/changes to Website
- _____f) Post/changes to Social Media

_____6) Consider creating written talking points

"What you do speaks so loud that I cannot hear what you say."
-Ralph Waldo Emerson

COMPONENTS OF SUCCESSFUL DECISION-MAKING & COMMUNICATION	
Component	**Why It Is Critical To Success**
• Trust-Both Ways	Management: Trust is earned, not granted with title. You must make good decisions and communicate decisions effectively so they are known and understood. This will secure trust for future decisions. Staff: Ask questions. Remember all of the good decisions. Do not dwell only on the one or two you did not agree with or did not understand. Sometimes managers really cannot share information.
• Communicate Early and Often	Management: Sometimes you have to withhold information, but do so only when necessary or risk losing trust. If you spring a big decision on people without any warning, they commonly: 1. Wonder if you made the decision last minute without thinking it through 2. Engage in rumor when there has been an information leak or vacuum Staff: Tell management what you are concerned about. Bring things up in team meetings.
• Obtain Input	Managers: Ask for input Staff: When asked for input, give it. Consultation is expected, required and appreciated
• Give Context	All communication benefits from context. Staff and management share an interest in the working of the whole organization: ○ They want a secure, well-run workplace, and ○ They value meaningful, mission-driven work
• Explain Thoroughly	Management: When decision-makers give a reason that people don't fully understand they might think the decision-maker made the decision based on incorrect reasoning, or the decision-maker does not understand the way things really work or the consequences of their actions…. Staff: Ask questions, but remember that you will not receive answers (and you should really refrain from asking) re: *confidential* personnel matters
• Take Plenty of Time to Ask & Answer Questions; Avoid Being Defensive	Management: Schedule time for discussion or Q&A or risk staff assuming they are not invited to ask questions or give feedback. If you cannot answer say so; it is better to say you are constrained than to say nothing at all. And avoid defensiveness. If you feel good about your decision, why would you get defensive? Consequences of defensiveness: ○ Staff stop asking, but their curiosity piqued, may engage in speculation ○ Defensive person may come off as angry or irrational; this may be taken personally by recipient Staff: Do not feel rushed. Remind managers you may have more questions once you have had time to think about what you have been told. Ask if there will be another opportunity to ask questions: when and of whom, how? Think about your questions; try not to ask about *confidential* personnel matters. Try not to be snarky (i.e, sarcastic, cutting, testy)….it invites defensiveness.
• Follow-Through and/or Explain When There is a Change in Plans	Management: When decision-makers do not follow through, staff might: ○ Think the decision-maker is being elusive ○ Think the decision-maker made the decision based on incorrect reasoning and now realizes they cannot follow-through ○ Worry; when decision-makers shift or ignore their own priorities, the workplace feels uncertain Staff: Remind gently. Everyone is busy. Schedules may have slipped or reporting may have slipped through the cracks.
• Be Consistent	Management: Decision-makers actions and patterns are noticed. When there are changes or exceptions, people notice, wonder why and sometimes it fuels speculation and rumors. Staff: Be constructive in making suggestions for changes in the way information is disseminated.

FYIs: Upcoming Events and Other

Defining FYIs

√ **Upcoming Events and Other FYIs**

- ☐ Bring these up in Team meetings as appropriate, then decide together which ones to bring to staff meeting
- ☐ Consider where else to announce:
  - Internal Twitter Feed
  - Email
  - RSS feed, Facebook, Twitter (for events)
- ☐ Be specific
- ☐ Be brief

Definitely FYIs:
FYIs are things that everyone or almost everyone might need or want to know and/or events that will impact admin, publishing, graphics and tech and on which KCSB & TBL may want to report. Examples:

- KCSBs 50th anniversary & the many events associated with it
- Big Program Board & KCSB sponsored entertainment
- Other big student planned rallies or events such as Carnival or a large political or relief rally
- Awards issued
- Battles won
- Upcoming lengthy vacation or leave
- Outcome of legislation that affects whole organization, but only if brief. E.g., complex legislation was already discussed so only outcome needs to be reported—no rehash, or simple legislation change yielding quick announcement. If not brief

Maybe FYIs:
Things that people in one or more other teams might want to know about. These are smaller events requiring less admin support but may be of interest and still touch multiple parts of the organization. Examples:

- Smaller organized events
- Legislation that affects multiple, but not all, BCCs across multiple advisors.
- Reminder of upcoming deadlines

Probably not FYI:
FYIs are probably not things that affect only one team such as accomplishments of the week. Share these in team meeting with some exceptions. For example, you probably would not announce achieving or slightly exceeding a monthly sales or membership goal. But you might consider an announcement if you significantly exceeded or missed projections due to some unforeseen event. And you would be more likely to report exceeding for the whole year than for one month.

FYIs are regularly shared in team and staff meetings and may be shared through the internal work-related Twitter feed which is used for status updates, reminders. In staff meetings, FYIs are definitely not lists of everything you have accomplished, or items that you want to discuss at that time. They can be notice of future discussion items. FYIs in staff meetings are always brief.

> "We have two ears and one mouth so that we can listen twice as much as we speak."
> -Epictetus

Methods for Keeping Students Informed

One of the goals in the AS Staff Strategic Plan is to "Improve methods by which we keep ourselves and students up-to-date." AS staff does this using all of the communication tools available but most frequently through meetings (planned and informal), emails, phone calls and text messaging.

AS' website is designed more to provide information for those outside of or new to AS; however, it is increasingly used to convey information to involved students. Examples of this are online forms, calendars, agendas, minutes and news feed.

AS also maintains a Twitter feed and an official Facebook page with newsfeeds and announcements, and links to BCC pages and AS events.
Methods used to keep students up-to-date:

Staff is responsible for keeping students up-to-date on:

1) Personnel changes
2) Campus-wide, system-wide issues
    a. How they affect students
    b. In what context should they be viewed
3) Decisions to change routine procedures (e.g., requisitions, time cards, honoraria)
4) Deadlines
5) Financial matters
    a. Status of their budget incl. expenditures and deposits
    b. Issues that affect their budget
6) Special topics (e.g., space issues, events or legislation occurring in other parts of AS

√ Keeping Students Up-To-Date

TOPIC	METHOD of COMMUNICATION

Personnel Changes	• General Email announcement and/or
	• Email to affected BCCs (new advisors for BCC or new staff working closely with the BCC (e.g., Recycling and WORMS would get special email notice of new Recycling advisor)
	• Senate
	  ○ In person
	  ○ In minutes
	• Website
	  ○ In announcements
	  ○ RSS feed on new hire's 1st day?
	  ○ On staff webpage
	• Facebook, Twitter…e.g., "Next time you're in XX building, stop by and welcome new staff, XX who's now working…."
	• Shared internal Twitterfeed
	• Walk around intros

Campus and System-Wide Issues	• Advisors forward emails with some added context, elaboration, explanation, analysis AND convey importance in Email Subject Line. This requires that advisors recognize the issue and take initiative to make contact. • Advisors (or manager if advisor not available) schedule meetings with Applicable BCCs or individual students. Managers must stay vigilant as well and bring issues to advisors' attention when appropriate.
Changes to Routine Procedures	• RSS feed • Emails • Announcements in meetings
Deadlines	• RSS feed • Emails • Announcements in meetings • Consider adding a deadlines calendar • Consider setting up a robo-call system
Financial Matters	• Finance Board announcements • Phone call from staff when requisition exceeds budget or available funds • Treasurers may access information from finance office • Org Sync
Special Topics	• Depends on many factors. Use what you know about the students, level of urgency, need for written record, etc. to make an informed choice.

Communicating Personnel Matters

Sharing non-confidential personnel updates acknowledges that all staff are invested in the workings of AS. When positions open, staff may know someone who should apply; when positions are left vacant, staff and students may need to pick up extra duties or refer stakeholders to alternative help. When recruitments close, staff may be asked to serve on an interview panel. The only personnel matters to keep confidential are those that are, in fact, confidential.

When is a personnel matter confidential? Personnel matters are confidential when they are about an individual: any aspect of a) their performance, b) specific compensation, and c) any medical or personal issues. However, managers and supervisors may discuss procedures and policy even in connection with a specific job.

Examples:

- You cannot discuss Suzie's annual evaluation, but you can discuss the criteria against which all staff are evaluated and can give examples of different performance levels.
- When hiring, you cannot discuss a candidate's interview, but you can, and should, discuss the criteria you are using to make the hiring decision.
- When hiring, you cannot state the order of ranked applicants, but you can divulge the number of applications received.
- When hiring or promoting, you cannot divulge a candidate's starting salary, but you can divulge the position and salary range.
- When an employee leaves or changes jobs for a performance or medical reason you cannot state that reason even if rumors ensue.
- But, if an employee leaves or changes jobs for a policy reason, you can state that…e.g., an employee is elected to a local board that oversees some of the same work on which they advise at AS. The move is consistent with avoiding the appearance of or actual conflict of interest. This is not a performance issue, but a policy issue, so it is acceptable to state.

Personnel updates are regularly shared in team and staff meetings.

Major Organization Changes

AS has a Strategic Plan goal that calls for AS to "Continually review organizational structure, positions and staffing levels to meet ongoing AS needs." Occasionally, that review will result in org structure changes. These may reflect changes in student interests and needs resulting in different levels of service or service areas, or they may reflect management needs. Whenever there is a change, the change must be communicated to staff and students.

√ Communicating Major Organization Changes

For major organizational changes, the Executive Director and managers:

_____1) Announce proposed changes to staff
_____2) Invite comments if applicable

Depending on the scale of the proposed change, the Executive Director and managers:

_____3) Meet with staff in teams and individually to obtain input and answer questions.

After considering input, the Executive Director:

_____4) Makes final decision

AS changes to the org chart are approved, the webdev team:

_____5) Posts org chart on AS website on the Staff or About Us tab
_____6) Posts changes in assignments on the AS Staff page
_____7) Follows personnel procedures for updating the AS Staff profiles

Throughout the year managers and supervisors reinforce:

_____8) How AS fits into UCSB/UC System
_____9) How AS staff and student structures interact
_____10) How my work fits into AS structure
_____11) Interactions with others at AS and UCSB
_____12) How information is stored and distributed
_____13) What others in AS need from me
_____14) What I need to know to effectively guide students

√ Personnel Matters Communication Checklist

For Job Openings:

At least a week before the position will open, HR:

_____1) Announces the job opening, description and dates via email (see template)

At least two days before a recruitment will close, HR:

_____2) Announces the closure date

_____3) Posts it (email, RSS feed, internal feed)

For New Hires:

Within two days of decision, applicable manager:

_____1) Speaks, in person, to employees who applied for and did not get the position

_____2) Announces the hiring decision to staff (in person if close enough to a scheduled meeting and/or if decision will be emotionally charged)

_____3) Posts it (email, RSS feed, internal feed) after speaking with all applicable staff.

_____4) Asks webdev to set up staff description on About Us page, so it is ready to go live day employee starts

On day new hire starts, HR or applicable manager:

_____5) Sends an introduction of new employee to staff and students via email, including:

- _____a) Job duties
- _____b) Location
- _____c) Contact info
- _____d) Some background (invite the new employee to help write—one of their first tasks)

_____6) Walks new hire around to meet people

On day new hire starts, webdev:

_____7) Sends new employee a questionnaire to fill out About Us page details

- _____a) Help them or direct them to their supervisor if they are having difficulty
- _____b) If they have not replied within a week, elevate to your supervisor (the AS staff page is the desired primary method for communicating what you do to students, so it must be appealing and up to date).

At next area and staff meetings, HR or applicable manager:

_____8) Introduces new hire, their position, location, even if this is a repeat for many people

_____9) Invites them to say hello

For Lateral Moves, Promotions:

Within two days of decision, applicable manager:

_____1) Speaks, in person, to employees who applied for and did not get the position

_____2) Announces the hiring decision to staff (in person if close enough to a scheduled meeting and/or if decision will be emotionally charged)

_____4) Posts it (email, RSS feed, internal feed) after speaking with all applicable staff.

_____3) Asks person moving or being promoted to arrange for webdev to change staff description on About Us page, so it is ready to go live day new position goes into effect.

For Changed Duties that Affect Operations (e.g., change in advising responsibilities):

Within two days of decision, applicable manager:

_____1) Announces change to staff & applicable students via email (see template)

Departures:

Within 2 days of announced departure, HR or applicable manager:

_____1) Sends an announcement of departure via email (see template)

- _____a) What that person's job was
- _____b) How long they worked at AS
- _____c) Why they are leaving, if applicable and with their consent (e.g., retirement, moving, taking different job, returning to school), or if they do not want to specify—or you cannot specify—you may state: "to pursue other interests" or simply, "is leaving AS"
- _____d) When their last day will be
- _____e) If applicable, opportunities to say thank you, goodbye TBA

When the departure is abrupt, HR or applicable manager:

_____2) Is consistent: follow steps above

> *"You cannot shake hands with a clenched fist.*
> *-Indira Gandhi."*

Personnel Email Announcement Templates

The following templates are for use in making personnel announcements to both staff and students. Emails are only one announcement tool. See table XX for additional methods of communicating personnel actions to staff and students:

Use the following when someone departs:

Subject Line: STAFF DEPARTURE: INSERT NAME
Inside text:
We regret to announce that, INSERT NAME, will be leaving AS on INSERT DATE.

NAME was AS' INSERT POSITION for XX years/months. They worked in the INSERT AREA/TEAM and worked with INSERT BCCs.

IF EMPLOYEE WISHES ADD: NAME will be INSERT WHAT THEY ARE GOING TO BE DOING on INSERT DATE.

IF APPLICABLE ADD: A retirement party is planned for INSERT DATE. AND EITHER ADD DETAILS OR TELL THEM TO WATCH FOR MORE INFORMATION COMING SOON.

For more information about NAME and all AS staff visit the staff webpage on the AS website.

If applicable, (never with involuntary departure) indicate when information about replacement hiring will be released.

DEPARTING STAFF'S MANAGER OR EXEC DIRECTOR MAY SIGN

Use the following for job openings:

Subject Line: AS INSERT JOB/POSITION Available INSERT DATES
Inside text:
AS is opening a recruitment for a/our INSERT TITLE

The AS staff INSERT TITLE/POSITION recruitment will open on INSERT DATE and close on INSERT DATE.

This position is in the INSERT AREA/TEAM and works with INSERT BCCs and OTHER APPLICABLE STAKEHOLDERS.

The position is FULL TIME/PART TIME/ FLEXIBLE TIME and works in the INSERT LOCATION.

The job description, application information are available INSERT LINK.

Please pass the word along to people you know who you think qualify and might be a good fit.

PERSONNEL MANAGER SHOULD SIGN

Use the following for new hires:

Subject Line: NEW STAFF: COLLOQUIAL TITLE
Inside text:
Please Welcome New AS Staff Member, INSERT NAME

NAME will be joining AS staff as INSERT TITLE/POSITION on INSERT DATE.

This position is in the INSERT AREA/TEAM and works with INSERT BCCs and OTHER APPLICABLE STAKEHOLDERS.

NAME will be working INSERT HOURS in the INSERT LOCATION.

Phone: INSERT; email: INSERT

For more information about NAME and all AS staff visit the staff webpage on the AS website.

PERSONNEL MANAGER SHOULD SIGN

Use the following when existing staff change jobs in AS:

Subject Line: STAFF CHANGE: NAME & COLLOQUIAL TITLE
Inside Text:
INSERT NAME is AS' new JOB TITLE/POSITION
If promotion add: Congratulations FIRST NAME!

NAME, previously INSERT OLD TITLE/POSITION will be changing to INSERT TITLE/POSITION on INSERT DATE.

This position is in the INSERT AREA/TEAM and works with INSERT BCCs and OTHER APPLICABLE STAKEHOLDERS.

NAME will be working INSERT HOURS in the INSERT LOCATION.

Phone: INSERT; email: INSERT

For more information about NAME and all AS staff visit the staff webpage on the AS website.

PERSONNEL MANAGER SHOULD SIGN

Record-Keeping and Record-Sharing

Why keep something? Only if you will use it. Therefore keep in a manner that allows you to share.

AS considers the reason(s) for keeping a record before committing to keeping it in order to avoid unnecessary bureaucracy. The test of whether a record should be kept is to determine whether and how it may be used in the future. The processes for record-keeping and record-sharing are inseparable, as how the record may be shared determines how it should be stored.

AS *keeps* records to share for several reasons:

- Accountability: Some records are kept to ensure processes were followed before a decision is made, e.g., payroll, personnel, and financial records, and legislative decisions as well as changes in process or organization that affect these.
- Efficiency and Continuity: AS keeps records to examine practices, learn from experience, and avoid reinventing, e.g., work processes (avoid mistakes & reinvention.), orientation & trainings, and statistics (examine successes & identify our mistakes numerically)
- Institutional memory: accomplishments, participants, nostalgia
- Mandates: Legal and institutional (UC) requirements. This is the one exception to the "sharing" rule, as mandated record keeping is often in preparation for anticipated use that may or may not occur (e.g., keeping financial or election records in case there is a later audit).

Staff Internal Annual Report

Each year at their annual retreat, groups and individuals report on the year's maqjor:

- Accomplishments
- Challenges
- Changes

These are recorded and become part of the institutional memory.

Highlights from the presentations are used in the staff portion of the AS Annual Report.

Why and How We Share Records

Reason Shared	Shared Externally	Shared Internally
To be Accountable	• Financial • Public Meeting Minutes	• Payroll • Personnel • Financial • Public Meeting Records • Strategic Plan Measurements
To be Efficient and Identify Best Practices and Trends		• Processes, both routine and infrequent • Trainings • Statistics (financial, participation, turnout…) • Measures of internal goals and objectives • Decisions • Student abilities
To Secure Institutional Memory; To Laud AS, Groups or Individuals	• Accomplishments • Milestones	• Accomplishments • Statistics (to identify milestones) • Events • Alumni • Minutes • Public Record • Press Accounts • Major Decisions; "Historic" actions
Mandated	• Financial • Public Issues Files for FCC • Intake forms for LRC	

And *shares* the records with different audiences:

- Internally: trainings, processes, decisions, accomplishments, statistics associated with group or individual work, and past experiences from which to learn or on which to build.
- Externally: mandated reports, accomplishments, financial information

And stores differently depending on the need to:

- Retrieve as needed-frequently or infrequently
- Retrieve on a schedule-frequently or infrequently

Communicating In Meetings

Meetings are one of AS' most important communication tools. They offer a face to face communication opportunity within a structure that makes meetings an ideal setting for team members to:

- Discuss-allowing for nuance and back and forth
- Inform-again allowing for nuance, Q&A
- Announce-especially issues that are emotional (positive and otherwise) or controversial, allows for shared emotional experience, Q&A, discussion

The keys to successful meetings are:

1. A sense of purpose conveyed through a strong agenda (never add items just for volume!)
2. Time management-keep meetings as short as possible
3. Respect your introverts—do not make meetings the only way to conduct business or provide feedback

There is a different purpose at each AS meeting, but meeting preparation, facilitation and minutes are consistent. See box at right.

Sample Month of AS Meetings & Minutes

Week	Mon.	Tues.	Wed.	Thur.	Fri.	S	S
1		Mgmt Meeting			Dist Mgmt Minutes		
2	Area Meeting			Dist. Area Minutes			
3		Mgmt Meeting			Dist Mgmt Minutes		
4	Area Meeting		Dist. Area Minutes prior to Staff Mtg	Staff Meeting			
5	Dist Staff Mtg Minutes	Mgmt Meeting					

√

Meeting Preparation

- Up to morning of day before meeting, staff can suggest items be added to agenda
- Publish agendas late day before meeting

Role of Facilitator

- Remind everyone of the rules
  - Don't interrupt, write it down and wait
  - Level of confidentiality
  - Step up, step back, be honest
  - No cell phones
- Lay out whether there will be additional opportunities for input
- Let the person representing the topic speak first then let everyone else speak. Proponent only speaks to answer direct questions or clarify until the end
- Ask those who haven't spoken if they'd like to, but do not pressure

Meeting Minutes

- One person at the meeting take minutes
- For team meetings, the team manager, for management meetings the ED, for staff meetings, rotating or assigned manager: reviews then distributes minutes OR posts them in a distribution folder which contains the minutes for the past year. Minutes have consistent document naming: meeting title and date to ease searches.
- Publish minutes within 3 days of meeting
- IT staff archives older minutes

Team Meetings

How often: Every other week or more often as needed
When: Beginning of week. Always at least 2 days before staff meeting
Standard Agenda Items:

- Around the room—quick check-ins
- Staffing update: Introduce new employees, announce anyone leaving, announce any new openings or any other changes in the team. Can also report on other openings, announced leavings, new employees in AS.

- Student update: Introduce new students, announce anyone leaving, announce any new openings or any other changes in the BCCs the team advises or oversees. Noted accomplishments (for future nominations)
- Manager's report: salient issues from Management Meeting
- Staff reports: work related if not reported elsewhere on agenda (e.g., Ticketing may want to report that they had record sales previous week; IV may want to report they have a leaky roof, so mtgs temp moved to another location…) Sometimes these turn into issues that end up returning the next time, sometimes they end up in FYIs—important thing is to make sure all staff have opportunity to convey what's happening with work, but also reinforce that people do not have to say something, for example, if someone sent out a status email about something yesterday, they do not need state the contents…can just remind those who haven't read it to do so.
- Updates on outstanding issues (from previous meeting—may or may not be any)
- Any new/special issues get listed separately, including:
    - Policy changes that affect team's work; do any process changes result? Do you need to take any issues back to management? Does this need to be reported to all staff?
    - New assignments from management or staff meeting
    - Requests for input/feedback/working group for special assignments
- What FYIs/Report Backs (see FYI discussion above) does team want to bring to upcoming staff meeting? Who will do it?
- Anything else?
    - Anything staff would like manager to take to management meeting?
    - Anything staff would like to see discussed at staff meeting (upcoming or future?)
- Training as needed

Management Meetings

How often: Every other week or more often as needed
When: Beginning of week
Standard Agenda Items:

- Around the room—quick check in
- Personnel- announcements and decisions
- Students update: announcements and decisions
- E.D. report
- Team reports
- Updates on outstanding issues (from previous meetings), including
    - Strategic Plan (this should focus on the managers assignments & reports from teams)
    - Process Improvement (this should focus on process decisions the management group needs to make…)
- Policy changes—decide which need to go to staff meeting, which only to team meetings. Any process changes? Any report back?
- Any new/special issues get listed separately (there may not be anything…everything may be covered in other areas)
    - Any assignments back to teams?
    - Anything to report at staff meeting?
- Manager FYIs/Report Backs —from their team meetings or their own work (see FYI discussion above). What goes on to staff meeting?
- Training as needed

Staff Meetings

How often: Once a month or more often as needed
When: End of week ensuring that teams have time to meet at beginning of week
Standard Agenda Items:

- Personnel update:
    - Introduce new employees
    - Announce anyone leaving
    - Announce any new position openings / closings / interview schedules
    - Other personnel matters in A.S.
- Student update: new students, announce anyone leaving, announce any new student job openings or any other changes that seem applicable to most or all of staff
- E.D. report
- Managers reports (can be skipped or delegated)
- Shout-outs; recognitions
- Updates on outstanding issues (from previous staff meeting or follow-through from group emails or issues discussed in all team meetings), including
    - Strategic Plan (this should not be free for all, but one or more assigned managers reporting on any significant changes, upcoming meetings…)
    - Process Improvement (this should not be free-for-all, but one or more assigned coordinators reporting on any significant changes, upcoming meetings…)
- Policy changes: Do any process changes result?
- Any new/special issues get listed separately (there may not be anything…everything may be covered in other areas)
    - …
    - …

FYIs/Report Backs —from each team as determined in their team meeting; apply to everyone in AS…or nearly everyone. They are not lists of everything you have accomplished, or items that you want to discuss at that time, though they can be notice of future discussion items. FYIs in staff meetings are always brief.

- Training as needed

Meeting Notes:

Sometimes people treat length of meeting as a proxy for how busy or important the work is…please do not do that!

Don't add items to the agenda just to add volume

Do skip items for which you do not really have substance to report or discuss

Also see FYI discussion above.

"To effectively communicate, we must realize that we are all different in the way we perceive the world and use this understanding as a guide to our communication with others."
- Anthony Robbins

Communicating Our Mission, Vision, Goals and Objectives

AS' work: what is it, how is it done, our expectations, how frequently, how quickly, how to ask for input, whom to ask for input, how and when to respond to requests for input, brainstorming, knowing when you need input/authorizations/approvals…there is a lot to communicate in our work every day.

Mission & Values

The mission is a short statement which succinctly describes why AS exists, what AS' professional advisors and staff do for whom. The mission is ***who AS is and why AS exists*** versus how AS does things. AS created a new Mission Statement in 2010 as part of the Strategic Plan Update. An effective way to measure whether the Mission remains relevant is to use it as a training and communication tool throughout the year.

In addition, AS has defined its values, both organizational values, and professional values. Professional values include:

- **Teamwork:** being respectful, seeking common ground as we do our work, and being honest, trustworthy, and straightforward. Being cooperative without compromising our independence.
- **Professionalism:** following accepted and ethical standards of our areas of expertise; doing our work fairly and with integrity; representing our recommendations to our stakeholders accurately, and with a sense of proportion; and completing our work thoroughly and timely so that it is available and relevant to inform stakeholders' decisions.
- **Flexibility:** thinking creatively, adopting new ways of addressing issues tailored to unique circumstances, and building on successful processes to make them better.
- **Accountability:** taking responsibility for completing high quality work.

All AS communication should reflect these values.

√ Mission & Values Communication Checklist

Within one month after it is approved, the web development team:

_____1) Posts the AS staff Mission Statement on the AS website on the Staff or About Us tabs. Note that the location may change if the website changes significantly.

Throughout the year, supervisors:

_____2) Use the AS mission and values as a training tool for new staff and for incoming students to describe what AS does and for whom.

In addition, managers, supervisors and HR staff:

_____3) Ensure that training materials including this operations manual include up-to-date links to the applicable mission & values.

AS Professional Staff Mission

We, the UCSB AS Professionals, empower, mentor, guide and support UCSB students to deepen and enhance civic engagement and social responsibility by:

- Facilitating learning through student initiated projects and programs.
- Ensuring student inclusion in shared governance of the university.
- Initiating and facilitating collaboration within the UCSB community and beyond.
- Safeguarding the continuity, financial stability and institutional memory of the AS organization for current and future students.
- Respecting student agency to create their own path.

Vision

A vision is a very broad brush statement providing a sense of purpose and direction. The seeds for elements of the vision may come from throughout the organization, but the vision message is articulated and delivered by the person or persons who will lead the organization to fulfill the vision.

√ Vision Communication

- ☐ Annually in September, the Executive Director articulates the vision for AS through a short written vision statement on the AS website and orally in a staff meeting or retreat.

The vision statement can take several forms:

- A statement envisioning the organization in the future
- A statement envisioning the environment in which the organization operates in the future—presumably changed for the better by the organization's efforts
- A statement envisioning the organization's stakeholders in the future—presumably changed for the better by the organization's efforts

Goals, Objectives and Activities

AS also has an articulated set of goals, objectives and activities in their Strategic Plan. The goals and objectives, like the Mission, help inform stakeholders about what is important to AS and what longer term projects you are actively undertaking. The activities, specific tasks necessary to accomplish the goals and objectives, become special assignments.

√ Goals, Objectives, Activities Communication Checklist

When approved, managers:

_____1) Communicate:

  _____a) What are goals, objectives and activities?

  _____b) How they affect each job (objectives and activities result in special assignments)

_____2) Invite staff to help populate activities

Within one month after it is approved, the web dev team:

_____3) Posts a link to the AS Strategic Plan Tracker on the AS website on the Staff or About Us tabs. Note that the location may change if the website changes significantly.

Throughout the year, supervisors:

_____4) Use the goals and objectives as a tool to determine staffing levels, priorities, and work load.

Quarterly or Annually, as defined, assigned staff:

_____5) Measure as specified in Strategic Plan

_____6) Report on progress

_____7) Review

_____8) Adjust as specified in the Strategic Plan

Goals and Objectives Defined

Goals are broad statements of things AS expects to attain or achieve. They are ***aims or ends***. They are not the final achievement—that is the mission. Goals are ***whats***, not ***hows***. Well-written goals are believable, attainable, based on identified needs and measurable.

Objectives are statements of ***specific, measurable and attainable outcomes*** that contribute to the achievement of a particular goal. They are also *whats*, not *hows*. Outcome-based objectives focus on:

- Changing staff or stakeholder behavior or circumstances;
- Changing something about the organization or community; or
- Establishing a process(es) for achieving a particular goal.

Activities are specific tasks necessary to accomplish objectives. They answer the following prompts: To achieve this goal and these objectives we need to:

- Do what?
- To what extent?
- To/with whom
- By when

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