UNIVERSITY
OF   Academic
CALIFORNIA   Senate

Roles and Responsibilities of Administrative Consultants and Academic Senate Analysts
Revised April 2021

To promote good relations, clear communication, and adequate consultation on a wide range of issues considered by the University's administration and systemwide Academic Senate, Senate and UCOP staff have developed the following processes and recommended practices.[1]

I. Role of Administrative Consultants

- Provide subject matter expertise and analytic support to Senate committees during and between regular meetings.

- Serve as communications liaisons between the UCOP Administration and the Senate to support good decision-making.

- Initiate and foster strong relationships between Senate committees and UCOP administration.

II. Specific Responsibilities of Administrative Consultants

- Attend committee meetings as requested by the committee chair for relevant parts of the agenda. Some consultants may attend entire meetings, except for executive sessions, while other consultants may join selected portions of the meetings. Consultants' principals may attend meetings or portions thereof, as their schedules permit and as their expertise is needed.

- Provide data upon request by working with the UCOP Institutional Research and Academic Planning (IRAP) unit.

- Provide respective principals with routine updates on developments from Senate committee meetings.

- Identify and provide information on upcoming issues of interest.

- Check in with the Senate analysts regularly to discuss meeting issues, pending items, upcoming topics and other relevant activities.

- Brief guests from the consultant's department prior to attending Senate meetings.

III. Role of Senate Analysts

- Staff committees, providing analytic and logistical support.

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[1] This document was originally developed by a joint workgroup of Senate and UCOP staff in August 2011.

- Serve as the primary liaison between the committee chair, Senate leadership, UCOP administration, and consultants to ensure that parties are properly informed of developments.

- Initiate and foster strong relationships between Senate committees and UCOP administration.

IV. Specific Responsibilities of Senate Analysts

- Draft committee agendas, minutes, annual reports, correspondence, white papers and other materials as required.

- Coordinate meeting logistics with the chair, committee members and consultants, including scheduling videoconferences.

- Support special committees and task forces, such as joint Senate-administrative work groups that typically include consultants.

V. Best Practices for Successful Analysts/Consultant Relations

- *Engage in respectful communication* even when there is disagreement among Senate and UCOP administration representaives.

- *Provide advance notice* for impending agenda items, activities, and reports.

- *Maintain confidentiality*: Keep apprised of which materials, topics, elements of deliberation, pieces of information, etc. are to be kept confidential. If materials may be shared, expectations on distribution, including any restrictions, should be clearly stated.

- *Exercise good judgement for review protocols*: Confirm what specifically must be reviewed by the Senate committee and when the review should be completed. Analysts, consultants, and committees should clarify and agree on instances when a courtesy notification is sufficient, and and whether a prospective alert is desired or retrospective reporting is acceptable.

- *Maintain diplomacy* and consider the campus viewpoints of the committee members.

- *Keep comments succinct,* and be careful to distinguish the views of the consultant's unit from the consultant's personal opinions about issues. Use good judgment in determining when it is appropriate to state a personal opinion.

- *Be proactive in seeking data and analyses* relevant to committee business, Be candid about what can or cannot be provided in terms of data and analytic support.

- Analysts may ask consultants to review relevant sections of draft meeting minutes prior to committee chair review.

VI. Selection and Onboarding of Administrative Consultants

- The Senate committee chair, in consultation with the Academic Council Chair and Executive Director, propose functional units, or specific staff members, as consultant(s) for individual committees. In most cases, consultants do not change from year-to-year, but new ones are added as need arises. Consultants may serve on one or more Senate

committees, and Senate committees may consult with representatives of more than one department.

- A letter or email requesting the service of a consultant is made to the department head (designated as the "principal") by the relevant Senate committee chair through the Academic Council Chair.

- The department head selects or confirms the appropriate consultant to a specific Senate committee and responds to the letter.

- At the time of appointment, the Senate Office sends new consultants an "appointment" letter that clarifies which committees the consultant is invited to support, and that summarizes expectations and conventions.

- Analysts may schedule a dedicated meeting with each of their committees' consultants at the start of the academic year, as appropriate, to review needs and establish expectations for consultation in the coming year. A brief discussion can be helpful in onboarding new consultants. Topics might include:
    1. Frequency of meetings and when the consultant will be expected to participate
    2. A general outline of topics to appear on committee agendas, including the first committee meeting of the year
    3. Committee priorities the that have been identified by the committee chair
    4. Policy issues and consultation topics that the administration expects to bring to the committee during the course of the year and a general plan/schedule for consultation on those issues.

VII. Resources

- [Guidelines for Systemwide Senate Committees](): Although written for committee members, it is useful for consultants to review some parts of the *Guidelines*, as they emphasize review processes and time frames, etc.

- [Shared Governance Primer](): Last updated in 2009, this document by former Senate Chair Daniel L. Simmons outlines the delegations of authority to the Senate, organization of the Senate, the interface between the Senate and the Administration, and provides an assessment of shared governance.

- [Committee Information](): Committee charge, bylaws, current roster, recent meeting agendas and minutes, annual reports, and meeting calendar.