

FACULTY VISIONING SUMMIT #1

The California Room — March 9, 2016



Approximately 20-25 faculty gathered in the California Room on campus, joined by another several dozen or so faculty on-line for a full day summit looking at the vision and change challenges of UC Merced as it heads into it growth goal of 10,000 student by 2020. This report contains digital photographs of the charts, Covision questions and themes, and various presenters at the Summit. In this picture Chancellor Leland is welcoming the faculty and introducing Gisela Wendling and David Sibbet, the facilitator team from The Grove Consultants International that were helping design, facilitate, and document the gatherings.





PREPARATIONS and SUPPORT TEAMS

CHANGE ALIGNMENT TEAM

Michael Reese, Vice Chancellor for Business & Admin Services and Erik Rolland, faculty for management, were tasked by Chancellor Leland to help coordinate and align the 2020 Change process. They organized a Change Alignment Team of key project leaders. This group helped design the summit, and were copartners throughout. Here they are shown with Gisela Wendling, the summit lead facilitation, getting ready for the event.





Chancelor Leland opened the Faculty Summit with a warm welcome, appreciating those who chose to come in the midst of schedules. She encouraged the virtual aspect of the Summit to allow as many as possible to participate. She introduced Gisela and David as facilitators of the event.



THE GROVE CONSULTANTS INTERNATIONAL

Gisela and David Sibbet from The Grove facilitated the design, facilitation, and graphic documentation the event in partnership with Lenny Lind from Covision.

The Grove and Covision have been working with kind of large scale meeting technology for more than 20 years, with clients like the eight state environmental collaborative in the upper Midwest called RE-AMP, The California Independent System Operators that run the electrical grid, Nike, America Speaks, Yosemite National Park, and the Presidio of San Francisco to name a few. The Grove worked with UC Merced's School of Engineering in 2015 on a Visioning and Organizational effectiveness project under the leadership of interim dean Erik Rolland, and was introduced to this recent process by him.

COVISION

Lenny Lind provided a in-room server and iPads for every three people. Questions designed by the Change Alignment Team (CAT) and reviewed with the Chancellor and Provost went out in three rounds of input. A "theme team" from the University helped find the patterns in the input.

KEVIN WRIGHT

Kevin assembled a video crew and his lead video producer Tim, to orchestrate both the in-room media and the streaming on-line media. Anyone who wanted to link into the Summit could participate real time and see all the presentations.





OUTCOMES, AGENDA, and GROUND RULES

http://bfsi.ucmerced.edu/2020Vision.





FACULTY VISIONING SUMMIT AGENDA

WEDNESDAY 3.9.16

MEETING PURPOSE AND OUTCOMES

- 1. A strong core group of faculty, staff and students understand the Vision & Change Alignment Process.
- Demonstrate inclusiveness: Hear and document input from critical UCM stakeholders and their interests.
- Educate everyone about CURRENT REALITIES and constraints to set a foundation for prioritizing projects and change activities.
- Continue the work toward developing a SHARED VISION for UCM and affirm our overall goals as a University.
- 5. Identify INTERESTS and CHALLENGES and ways to successfully work with these challenges.
- 6. Generate buy-in into the VISION and the overall Visioning & Change Alignment Process.
- Communicate how we will handle input on this process moving forward and how the Cabinet plans to follow through.

(WHITE: Presentations, GREEN: Electronic Input, BLUE: Participant town hall dialogue)

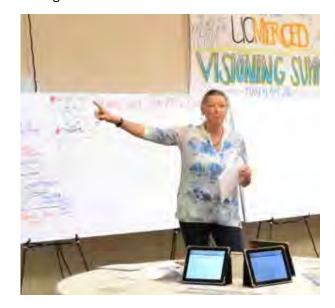
TIME TOPIC DESCRIPTION

	7.5 2.7 - 2.0			
8:30	Gathering- California Room-Lake Campus			
9:00	ORIENTATION	Welcome & Purpose; Introduce facilitation team Review Outcomes, Agenda, Roles and Rules		
9:25	WHY ARE WE HAVING THIS PROCESS?	Current challenges facing UCM Visioning & Change Alignment (Project) Roadmap & Context		
10:00	INPUT ABOUT CURRENT REALITY	Table group answer questions posed on ipad using Covision platform Theme team reports —in-room and from satellites		
10:30	Break			
10:45	WHY CHANGE?	Town Hall-style review of themes; general dialogue with microphon Digital comments from other locations		
11:20	UCM DRAFT VISION	Review the Big Draft Vision		
11:50	FACULTY VISIONING	Conference Presentation Visioning: Table groups imagine UCM in 202:		
12:30	TOWN HALL DIALOGUE • Reporting out on Cover Story Visions			
1:00	Lunch			
1:45	IDENTIFYING SHARED VISION THEMES	Table group answer questions posed on ipad using Covision platform Theme team report —in-room and from satellites		
2:15	DIALOGUE ON VISION THEMES	Town Hall dialogue		
2:50	POLLING FOR WHAT'S COMPELLING	Table group rate vision themes on Covision platform		
3:00	Break			

UCM Faculty SUMMIT Agenda 3/9/206 Page 2 HOW WILL WE MOVE . Displaying Polling results TOWARD THE VISION? . How to tackle wicked problems . Overview of Change Alignment Framework Streams . How the Change Alignment Team (CAT) will work going forward STAKEHOLDER 3:45 . Table group answer questions posed on ipad using Covision platform INTERESTS AND . Theme team reports-in-room and from satellites CONCERNS 4-20 **IDENTIFY SUCCESS** . Town hall reflections on what is critical to success FACTORS 4:35 **NEXT STEPS** · Explain how input will be handled · Purpose of Vision Summit II-focused on HOW to take action . Encourage participation in the week-long, on-line Summit 4:50 TAKEAWAYS · Participants share takeaways CHANGE ALIGNMENT TEAM (CAT) Michael Rees, Vice Chancellor, Business and Administration Services—CAT Co-leader Erik Rolland, Faculty, School of Management-CAT Co-leader Andy Boyd, Executive Director, Business and Finance Strategic Initiatives Center Gregg Camfield, Vice Provost, Faculty Richard Cummings, Project Marketing Coordinator, Office of Planning and Budget Michael Dawson, Faculty, Natural Science Brian Gresham, Director of Administrative Operations and Financial Planning, Division of Student Affairs Ann Kovalchick, Associate Vice Chancellor and Chief Information Officer Jason Martin, Organizational Development Consultant, Business and Finance Strategic Initiatives Center Brian Powell, Assist Vice Chancellor of HR Anthony Sali, Strategic Initiatives and Communications Coordinator, School of Natural Sciences Susan Sims, Chief of Staff to the Provost **CONSULTANTS & SUPPORT** David Sibbet, President of The Grove Consultants International—graphic facilitation Gisela Wendling, Director of Global Learning, The Grove-facilitation Malgosia Kostecka, Graphic Recorder, The Grove-meeting logistics Lenny Lind, Covision, Chairman, Founder—Covision electronic input platform Tracy Cone, Covision—technical support Kevin Wright, Kevin Wright Productions-A/V set-up, video streaming Kim Garner, Chief of Protocol & University Events Manager-facility logistics A week-long virtual summit will be held at end of March for those who cannot attend the first summit in person. This will not be interactive, but will include videos of major presentations and all the questions being asked during the first summit, with places to respond. Instructions on how to connect and all ongoing news about the Visioning & Change Alignment Project can be found at a dedicated website,

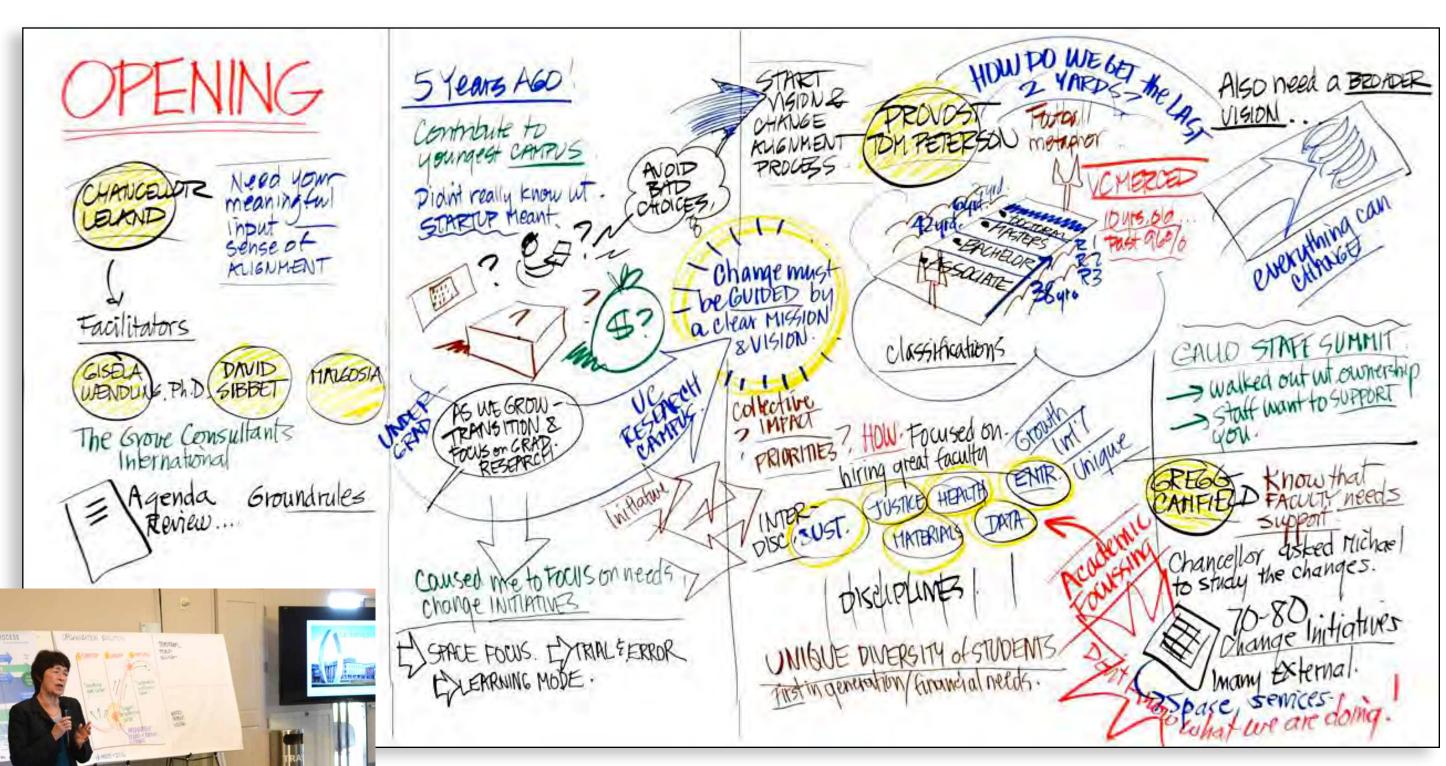


This participant agenda guided the process. It lists the members of the Change Alignment Team who planned the event, as well as the consultative staff. David reviewed this agenda after Chancellor Leland's introduction. Gisela then review the ground-rules that would guide her facilitation.





WHY ARE WE HAVING THIS PROCESS?



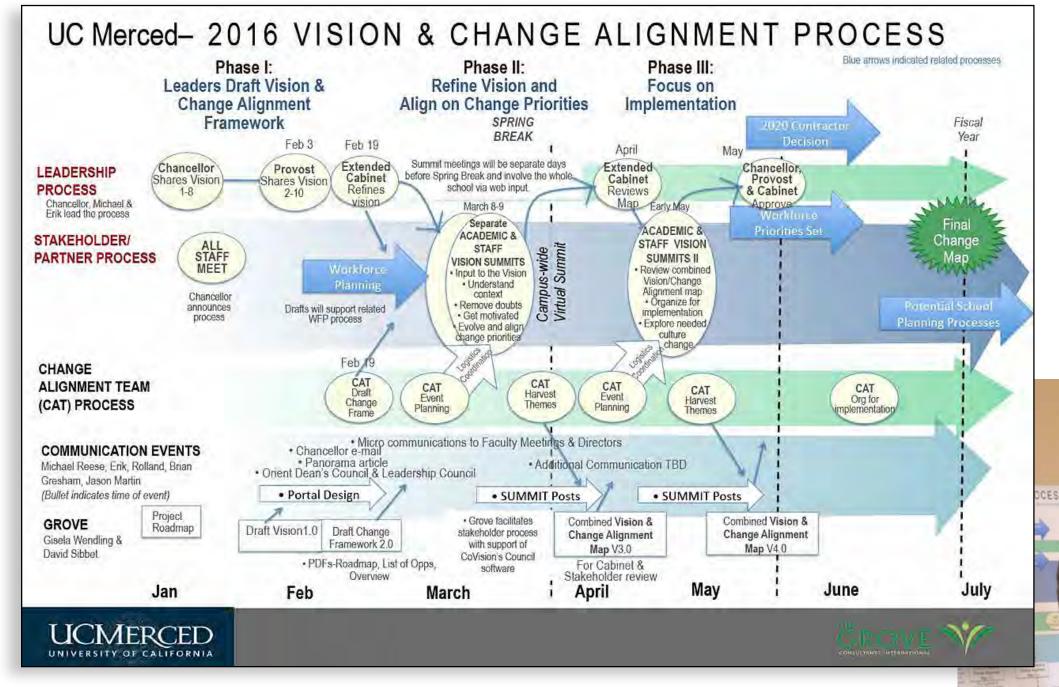
After Gisela finished reviewing the ground rules, Chancellor Leland returned to the stage and shared her perspective on the reasons this Visioning & Change Alignment Process are necessary. She has been listening to everyone since she arrived five years ago, and knows that through passion, commitment, and community the campus survived the 2009 financial crises. UCM is now entering a growth phase, with attendant turbulence. Ten thousand students are needed for self sufficiency. But beyond that UCM needs real claims to fame in distinguished programs, research, sustainability, big data, and connection with valley-related problems. "Plans must be enhanced by your vision!" she invited.



PROVOST TOM PETERSON'S PERSPECTIVE



Provost Tom Peterson, as leader of the academic side of the campus, spoke to his perspective on why a change is needed. He analogized to a football game, explaining how different kinds of degree granting institutions can be mapped on the various yard lines. Ones granting associate degrees are on the 38 yard line. Those with bachelors are at the 20 yard line. Those with Masters are at the six yard line and doctoral programs at the four yard line. UC Merced is already at the two yard line with its research and Carnegie designations. "How can we go all the way to the goal," he asked? He also reviewed his commitment to the academic pillars identified last year and strong core disciplines needed to support them.



Gregg Camfield, Vice Provost for Faculty, oriented everyone to the Vision and Change Alignment process, using the roadmap shown here. He is a member of the Change Alignment Team representing the faculty. He explained that the Chancellor asked Michael Reese to look at all the change initiatives being initiated on campus. An analysis showed more than 70 and the need for some alignment. He and Erik Rolland then constituted a Change Alignment Team or CAT and determined that it also needed clarity of vision and mission to have clear criteria for prioritization and alignment.



TARCH 869 INC.

ORGANIZATION EVOLUTION and WICKED PROBLEMS

ORGANIZATION EVOLUTION

(1) STARTUP 26 POWTH 3 MATURE

"anything goes culture"

"Sustainability & efficiency culture:"

"Support the momentum culture"

PREDICTABLE PERIOD OF TURNOIL & CHANGE



2000 - UCHERUID > 2016

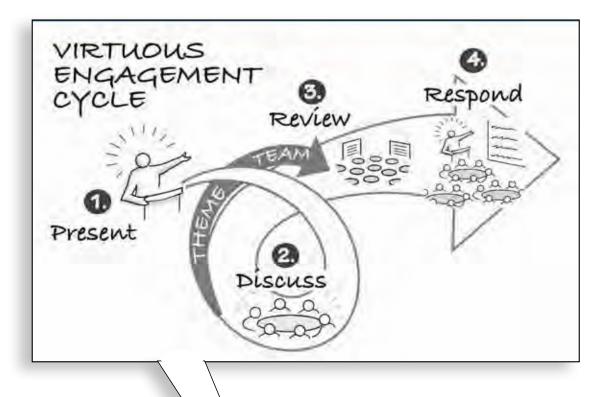
Erik Rolland, management faculty and coleader of the CAT, placed the visioning & change alignment project at the predictable flux point when an organization moves from a startup phase to a growth phase. The predictable period of turmoil & change can be navigated by having a clear process that can contain the many conversations and changes that need to take place.

As a transition he asked David to share the story he told at one of the CAT meetings about how to solve wicked problems. Traditional problem solving assumes that one can step through in a waterfall fashion, starting with learning and moving to solving in a stair step approach (shown on top of the chart).

Wicked problems are those that have new players entering, are inherently complex and have new information and assumptions changing. Here the approach is to BOTH learn and solve in a continuous process of iterating and prototyping, until the process funnels down on a "satisficing" solution. This process is behind the approaches called "agile planning" and "design thinking."



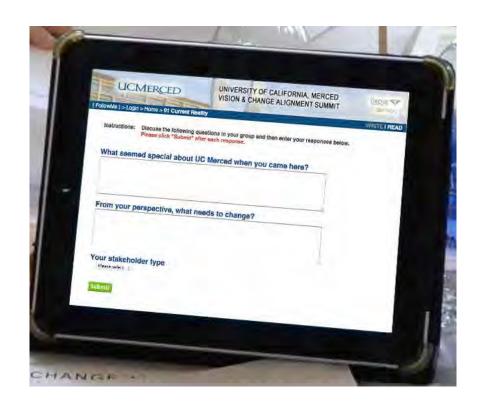
COVISION QUESTIONS



After the orientation, the Faculty Summit began the first of three rounds of input on Covision iPads. Lenny Lind explained the "virtuous Engagement Cycle" that would drive the process, with input on the questions shown to the right, pushed out to teams of three at the round tables and on-line.

He then introduced the "Theme Team" (seated around Lenny below left,) They would find patterns in the inroom and on-line input, and present themes to the whole group.

At this point David provided an orientation to the online participants, talking to the stationary camera at the back of the room. Because faculty need to teach classes, the Summit was designed to allow coming and going.









WHAT SEEMED SPECIAL? — WHAT NEEDS TO CHANGE?

UNIVERSITY OF CALIFORNIA, MERCED
VISION & CHANGE ALIGNMENT SUMMIT

(FollowMe) > Login > Home > 01 Current Reality - themes

THEMES in "What seemed special ...?"

- . The draw of creating a strong program in our discipline
- The opportunity to work with really good people genuine risk-takers, pioneers, visionaries
- · Opportunity to make an impact, create a legacy
- · Interdisciplinary intellectual excitement, with unique intersections
- Serving first-generation students
- Entrepreneurialism
- . Contributing to the public good
- . Location matters!

THEMES in "What needs to change?"

- Increase support for faculty: streamlining, efficiency, and basic resources
- More support for teaching, research, grantwriting, etc.
- Need to build trust between faculty and the rest of the institution
- Improve communication between faculty and university leadership
- Fix the disconnect between university and community; communication
- There is inequality and inequity re resources, power, leadership, workload, diversity
- Need a shared definition of interdisciplinarity, common language around achieving it
- Respect faculty expertise
- Worried about administrative control of academic life
- · Shared governance not honored or strong enough
- · Space!
- Clarity around processes
- Need to work more collaboratively between faculty and administration
- · Fix administrative "bloat"

The themes above were identified from the first round of input questions.

As the groups worked, several faculty joined and were brought up to speed by David (right hand picture).

1ST TOWN HALL QUESTION

Given the themes that have been identified, which do we have to understand and explore further?

TOWN HALL CONVERSATION

Following the first round of input, Gisela reviewed the Town Hall conversation instructions, and invied the small groups to talk a bit about what they wanted to explore more fully. The group then engaged as a whole.



Town Hall Conversation Instructions

The Town Hall parts of the SUMMIT are chances for the UCM community to experience itself as a whole, and come to greater appreciation of a wide diversity of opinions. It is also a chance for the university's leadership to hear from a wide cross section of the campus. Here are some guidelines to help our Summit work well.

- Raise your hand to get a microphone. It's your link to the video we are streaming and the satellite participants.
- 2. Wait for the facilitator to call on you.
- Keep your comments focused leave room for others to speak—"Step forward and then step back."
- 4. Speak your personal truth from your own perspective.
- 5. Avoid personal attacks and blaming.
- In the small group work, make sure that everyone has a chance to participate.







WHY CHANGE? — WHAT DO WE NEED TO UNDERSTAND AND EXPLORE?









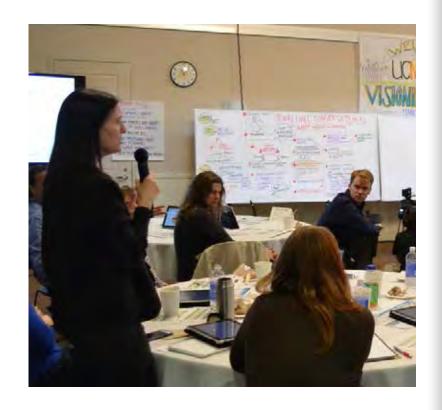
This page shows the faculty groups in their initial table discussions, and then sharing comments about what needs to change with the group as a whole.

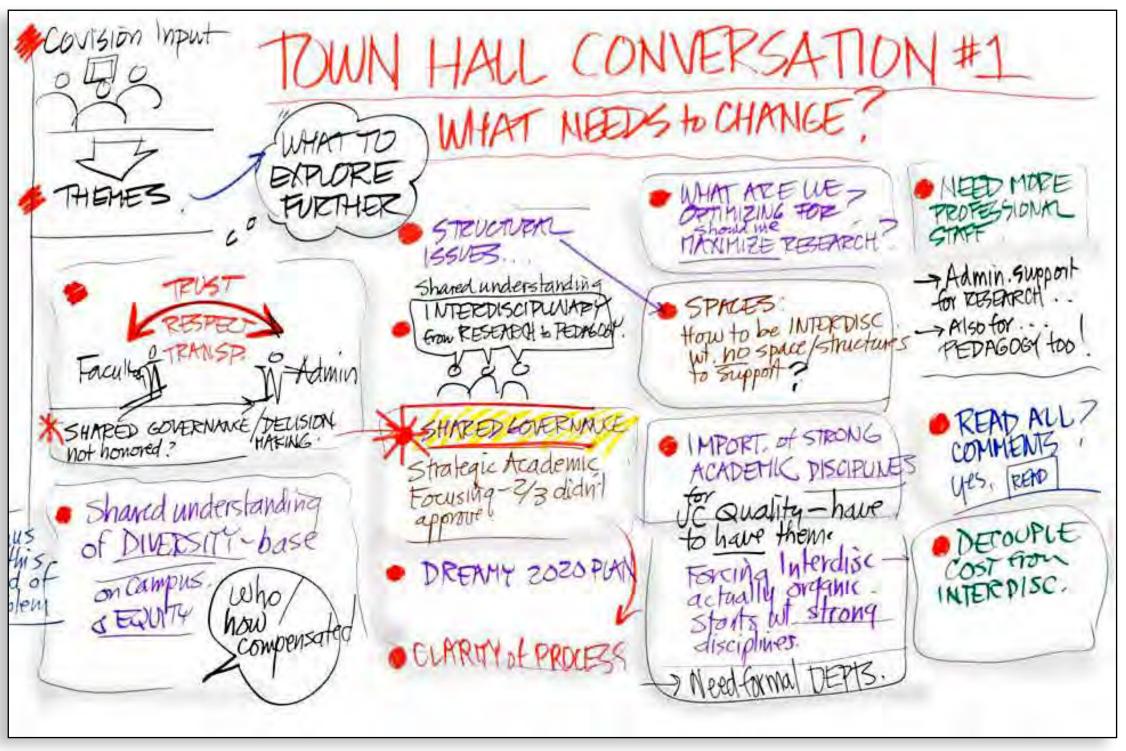
Gregg Camfield (left) would occasionally read comments from the on-line participants to add into the conversation.





WHAT NEEDS TO CHANGE CONVERSATION

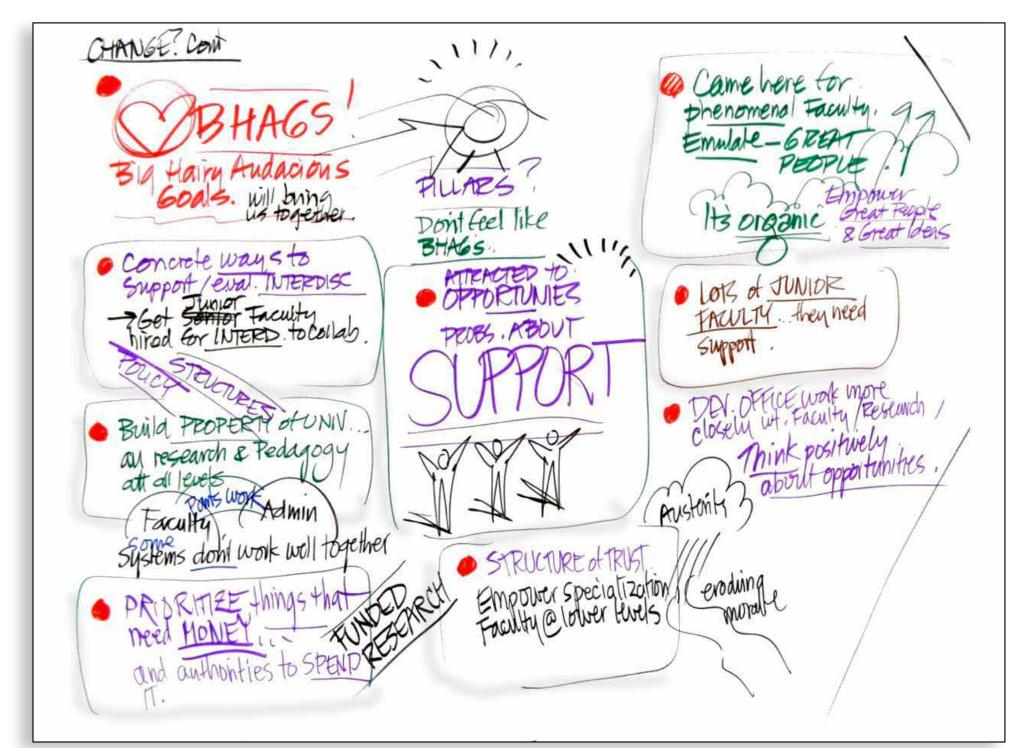




Following table discussions of the themes from the initial Covision question about what needs to change and what needs support, the group as a whole voiced a number of themes. They are recorded here.



WHAT NEEDS TO CHANGE, Continued



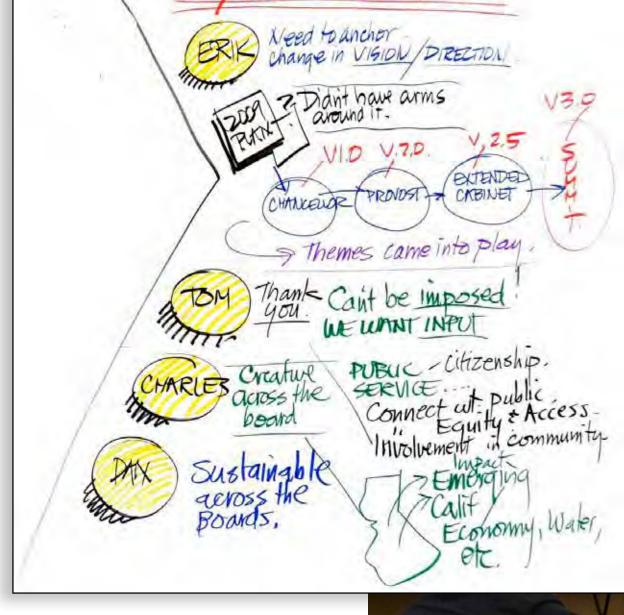




This chart continues to reflect the comments about what needs to change.



SHARING THE EARLY DRAFT VISION

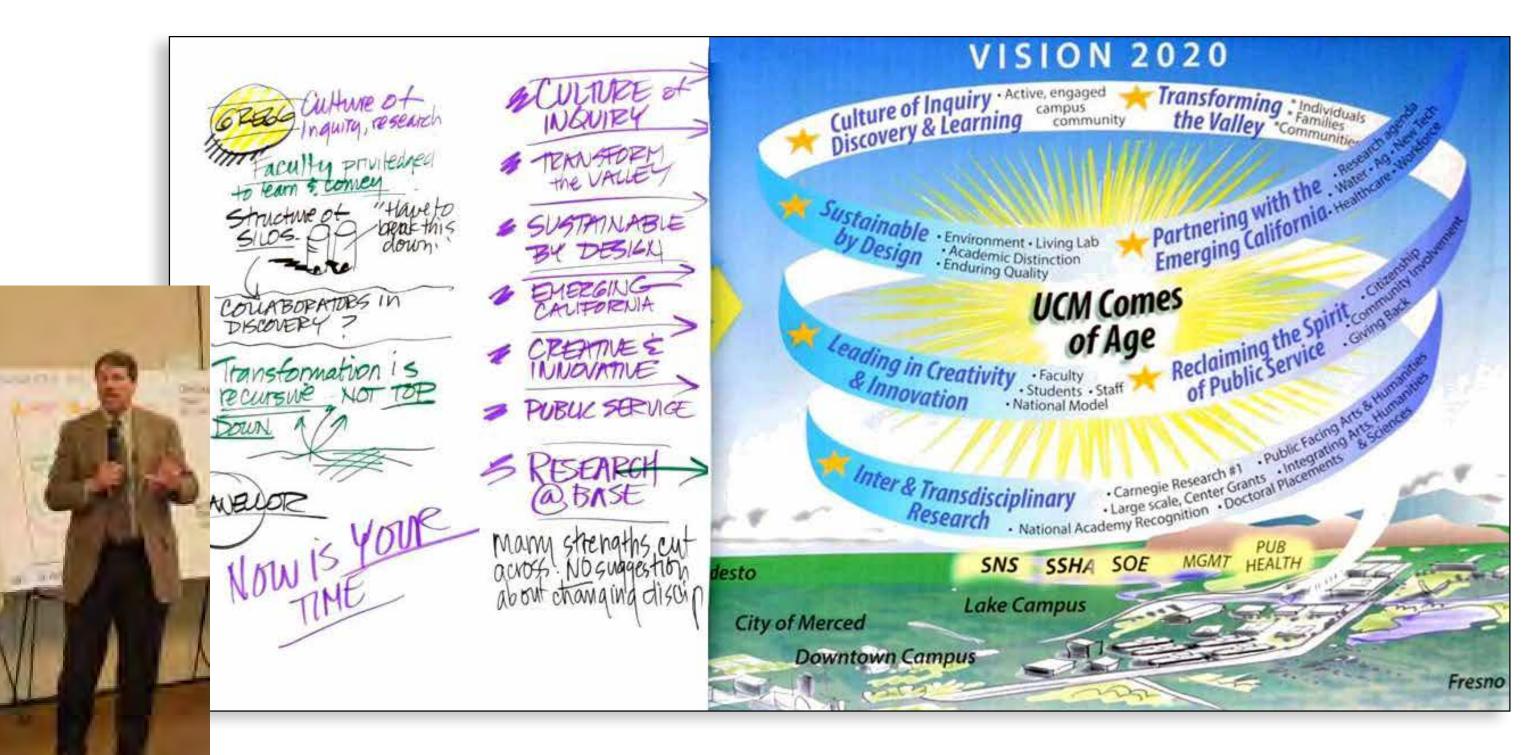


Erik, Tom, Charles and Dan reviewed the work done so far to create an early draft of a vision for UC Merced. It began with an interview with the Chancellor, then with Tom, the Provost, and finally the extended cabinet including the deans, who were guided through a full visioning process. Tom appealed to faculty to provide even more input. Charles shared a bit of the flavor of the meetings and Dan brought some detail to the "Sustainable by Design" vision theme. Erik is shown beginning to explain the vision below.





SHARING THE EARLY DRAFT VISION



Gregg concluded the review of the vision draft with some reflectiosn about what it means to be a culture of inquiry, discovery anbd learning. "How can we get beyond our structure of silos" he asked?



HOW DO SYSTEMS CHANGE?

GUIDED IMAGERY VISIONING



RUBBER BAND METAPHOR

As a lead-in to the staff doing visioning, David explained that it is useful to think of institutions as systems, that like the rubber molecules in a rubber band, want to pull back into shape when stretched. The stretch is a pull between aspirations and visions and current reality. A basic principle is that systems resist structural tension of this sort, and will move tor resolve it, just like the rubber band. There are three ways:

- 1. Lower the vision
- 2. Don't connect the two. Go to Summits and never do anything afterward to examine progress.
- 3. Bring current realities up toward the vision. It has to be strong to has this result.

Imagine a past experience of stepping up to a challenge and succeeding. Hold that feeling as you imagine answers to the general questions I will ask.

Imagine you are going to an important conference in 2020, It is being held on the UCM Campus and you presenting about the growth of UC Merced and its accomplishments. Let yourself be fully in 2020 and accept whatever images and ideas appear as I ask my questions. Begin by imagining the conference and where it is being held on campus.

Imagine walking to the conference with a colleague. Imagine who that is. They are excited about what you will be presenting. You are convinced it will get the attention of the audience. Impagine setting up for your presentation. There are many people there. Imagine who is attending.

Your opening title slide makes you feel very proud to be a part of the University. Imagine the title of your presentation. What image did you pick to start out with? You want to make several key points during the presentation about the results that UC Merced has achieved. Imagine the key points you will make about the University as a whole. What kind of results has it been achieving?

Think about your own field. You are engaged in some work that is very interesting to you. Imagine what you have picked to talk about. You've chosen some key slides to illustrate your points. What are they?

You know that UC had an early interest in interdisciplinary research and had an initial faculty with many untenured faculty working within their disciplines for tenure. The University is making good progress toward balancing these two needs and you have some points you want to share about that. What are you saying about how this tension is being faced?

Faculty have become meaningfully involved in the The Valley and Merced itself. What are some of the projects you are talking about that make you feel especially good? In spite of faculty being spread out geographically, a sense of community has developed. Where is this growing? How are faculty relating to each other and the campus?

Imagine that the University just received a high level Carnegie research designation. What led to that? Imagine what kinds of research are moving forward.

Imagine your presentation is over and your colleague comes up. They know what contribution you made to UC Merced's success. What are they saying to you about your contribution?

Now slowly open your eyes and without talking to anyone, take some notes about what you imagined. You will have a chance to share some of these in a minute or so.

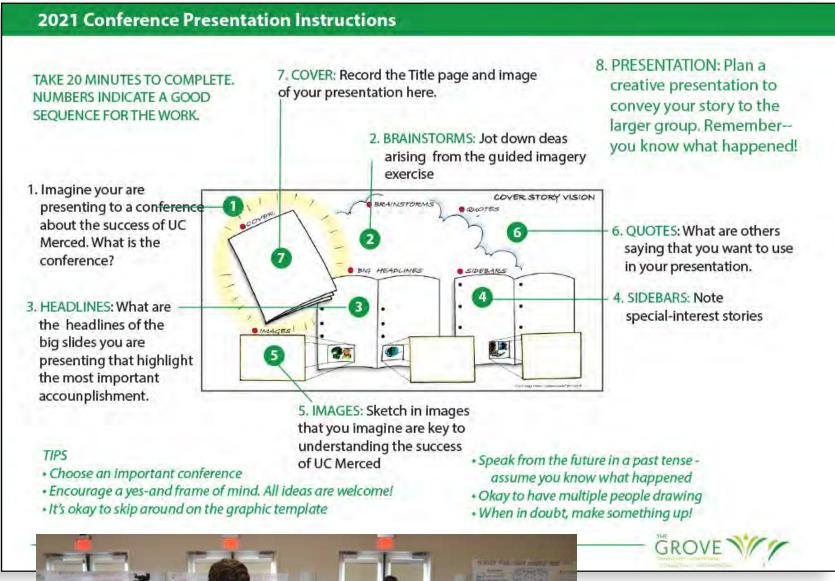
GUIDED IMAGERY

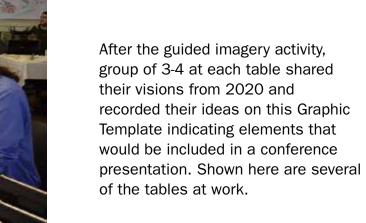
Gisela next led the group in a guided visioning exercise, reproduced here as she read it. When a person hears general questions like this, something arises that is worth paying attention to. Everyone was encouraged to not work at this but just accept the ideas and images that came.





COVER STORY VISION ACTIVITY







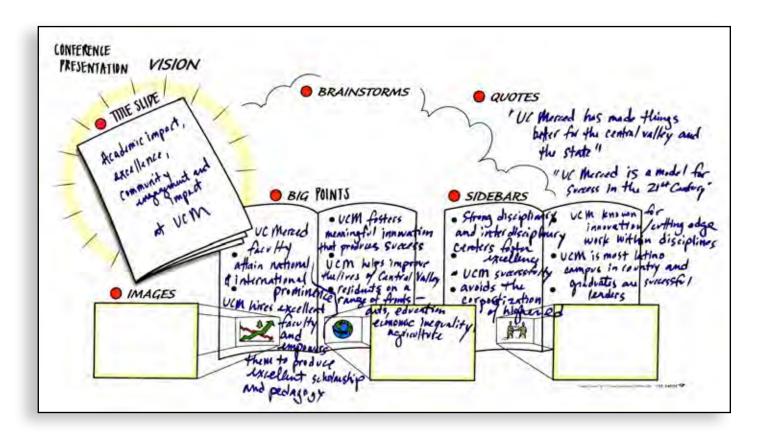


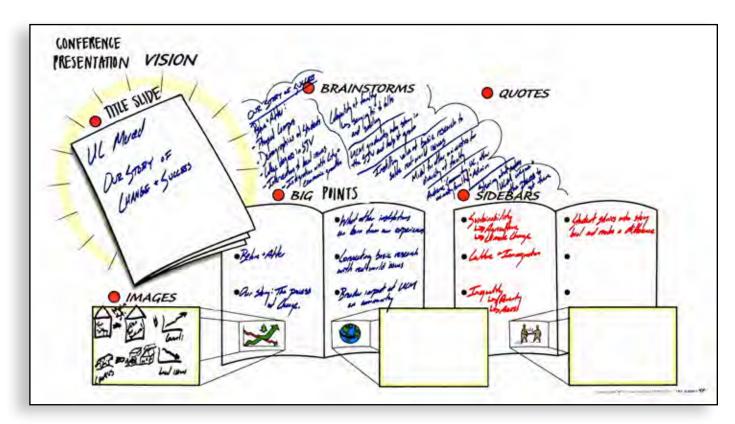


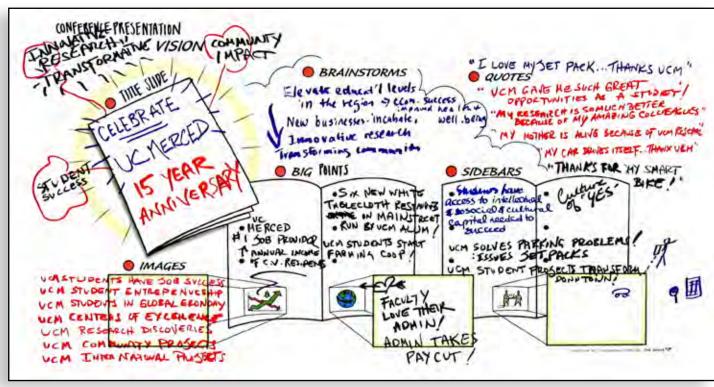


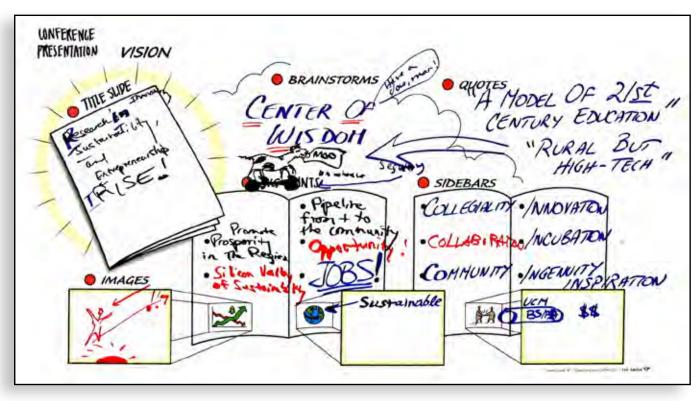


EXAMPLES OF 2020 CONFERENCE PRESENTATIONS





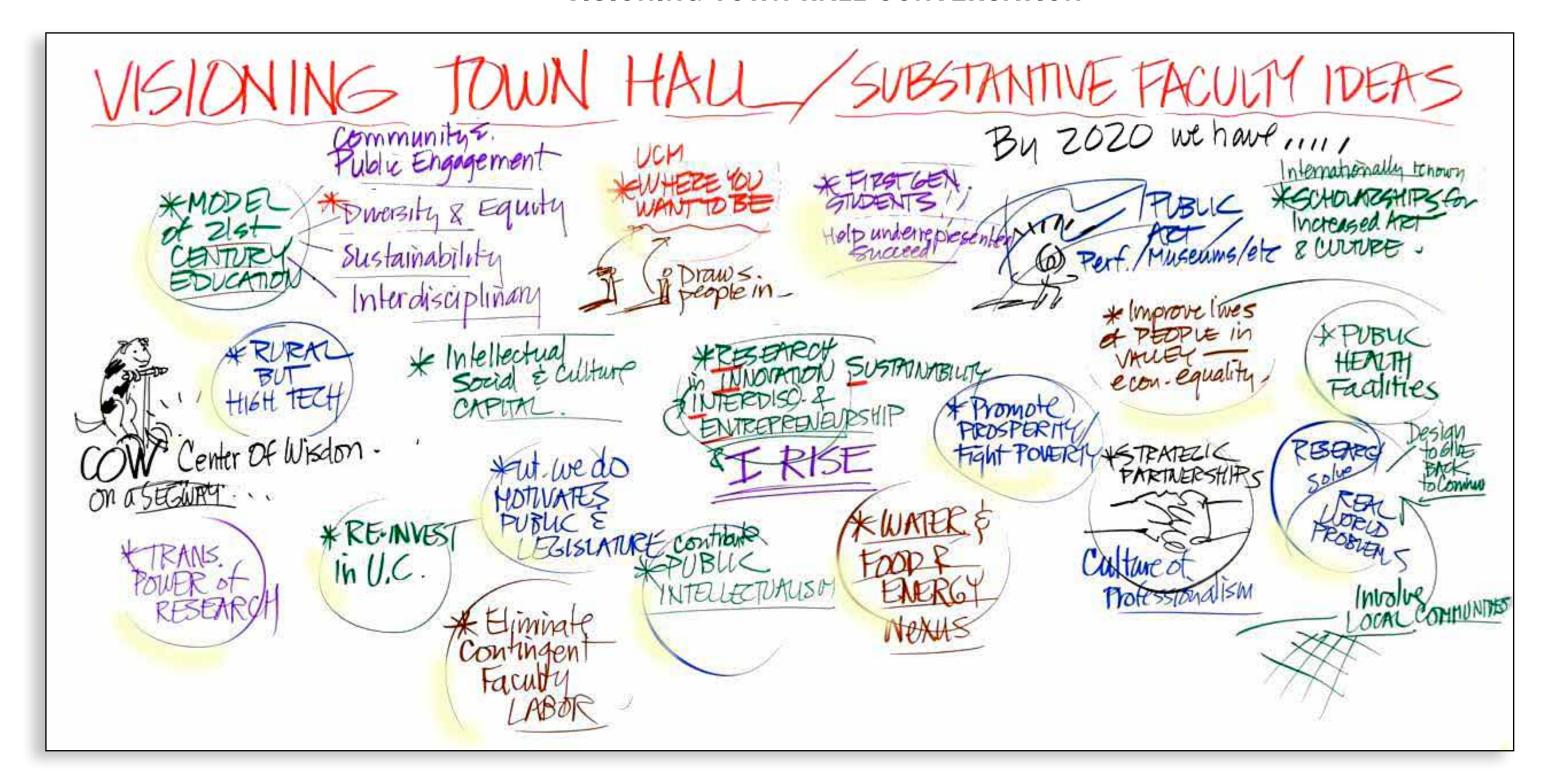




Here are four Conference Presentation graphic templates chosen at random from the eight completed. All are observable at the UC Merced change website.



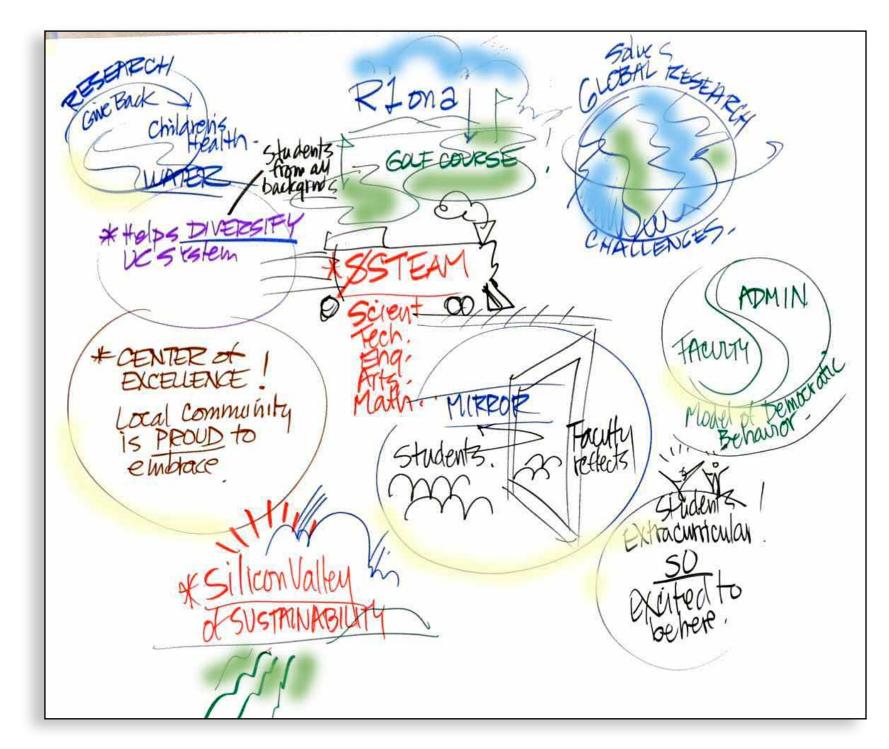
VISIONING TOWN HALL CONVERSATION



Following the table template exercise, everyone shared some of the themes that came out of the conversations.

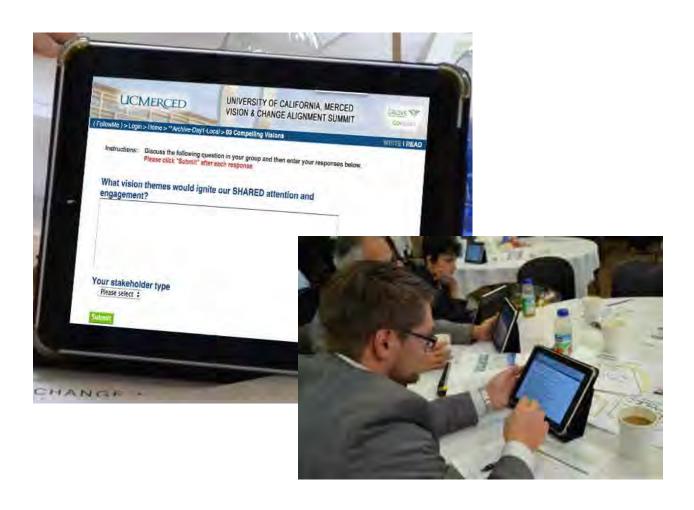


CONFERENCE PRESENTATIONS, Continued



Here are some additional themes shared in the group conversation.

SECOND INPUT QUESTION "What vision themes would ignite our SHARED attention and engagement?"



Following the review of the draft vision, the converence presentaiton activity, and the general discussion, everyone in-room and on-line was asked to pull out the vision themes that would provide the best SHARED direction for the University.



POTENTIAL SHARED VISION THEMES

COVERNO

UNIVERSITY OF CALIFORNIA, MERCED GROVE WE **UCMERCED** VISION & CHANGE ALIGNMENT SUMMIT FollowMe) > Login > Home > **Archive-Day1-Local > 03 Compelling Visions - themes

THEMES in "Compelling Visions"

- · Leading in innovation and creativity
- Sustainability by design
- · Public service / transforming the Valley: retaining talent IN the Valley
- · A culture of inquiry
- Supporting student success
- · Diversity and inclusion; serving previously underserved communities
- · Increasing efficiency and innovation to improve the output of staff work
- Effective use of data to drive change and good practices
- Linking to regional business, esp. small business
- The vision should live beyond 2020
- Regional results, with global impact

These are the "compelling vision themes" identified by the faculty. Gisela asked each of the tables to pick one or two of the themes that seemed most important to them and develop talking points that would explain the idea. These are reported on the following page.

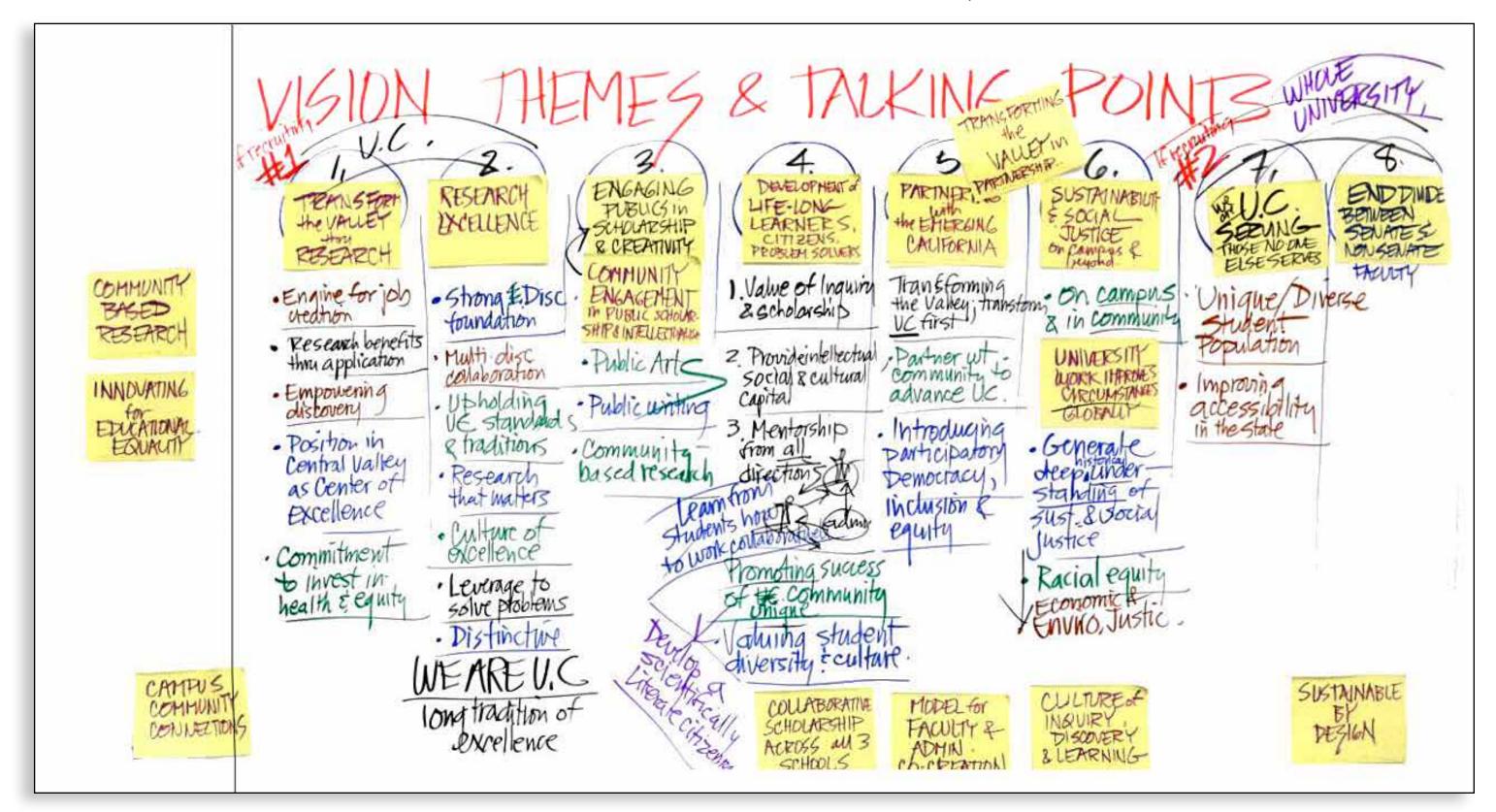
2ND TOWN HALL QUESTION

What vision headlines will provide the most clear and compelling direction for our University?





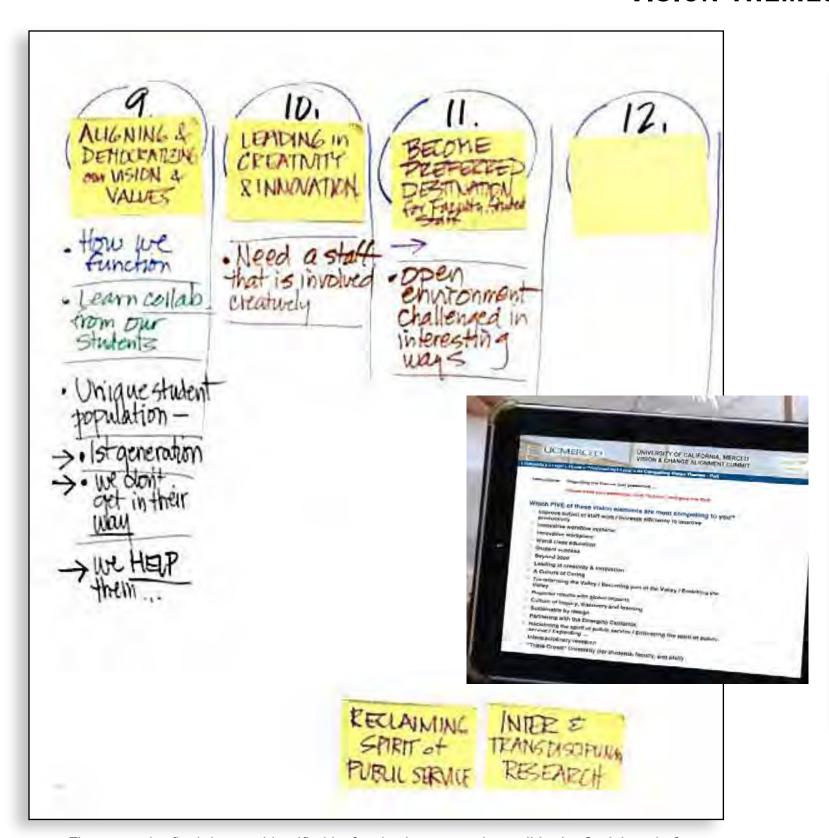
VISION THEMES AND TALKING POINTS, Continued



Here are the vision themes and talking points that the faculty tables identified as most important to them. The yellow stickies along the bottom are from the Early DRAFT vision.



VISION THEMES and POLL RESULTS



Excellence in Research	18	15	33
Development of life-long learners, citizens. and problem-solvers	19	11	30
UC - serving those no one else serves	16	8	24
Transforming the Valley in Partnership / Partnering with the Emerging California	14	6	20
Social/Economic/Racial/Environmental Justice and Sustainability on Campus and in the World	10	5	15
Transforming the Valley through Research	9	5	14
Engaging Publics in Scholarship and Creativity	7	6	13
Leading in creativity and innovation	6	6	12
Become the preferred destination for faculty, students, and staff	5	4	9
Aligning and democratizing our vision and values	4	4	8
End divide between senate / non- senate faculty	0	2	2

The combined poll results are shown above. The in-room poll is on the left and the on-line in the middle. The combined poll results are on the right.

These are the final themes identified by faculty. Lenny put them all in the Covision platform and Gisela asked everyone to indicate the four that were most compelling.



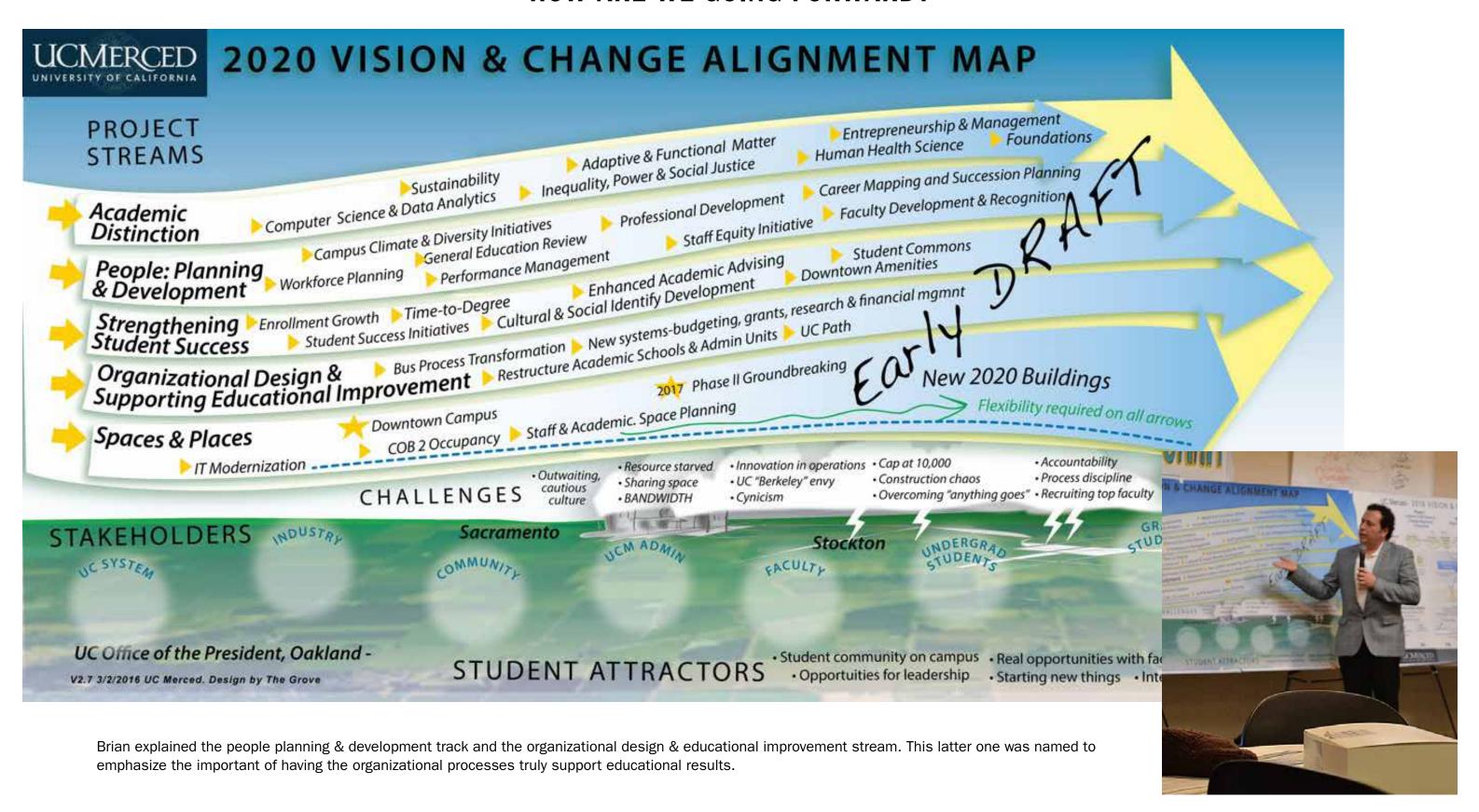
HOW ARE WE GOING FORWARD?



Susan Sims, Jason Martin, and Brian Powell opened the third part of the Summit by sharing the Early DRAFT of the change alignment part of the vision map. They explained how Jason had gathered information about all the current change project. The CAT then organized them into logical work streams. This version does not include phasing and deadlines. The next step in the process will be to do this. At this point Susan, Jason and Brian simply explained the different kinds of projects already identified for the work streams shown on the following page.

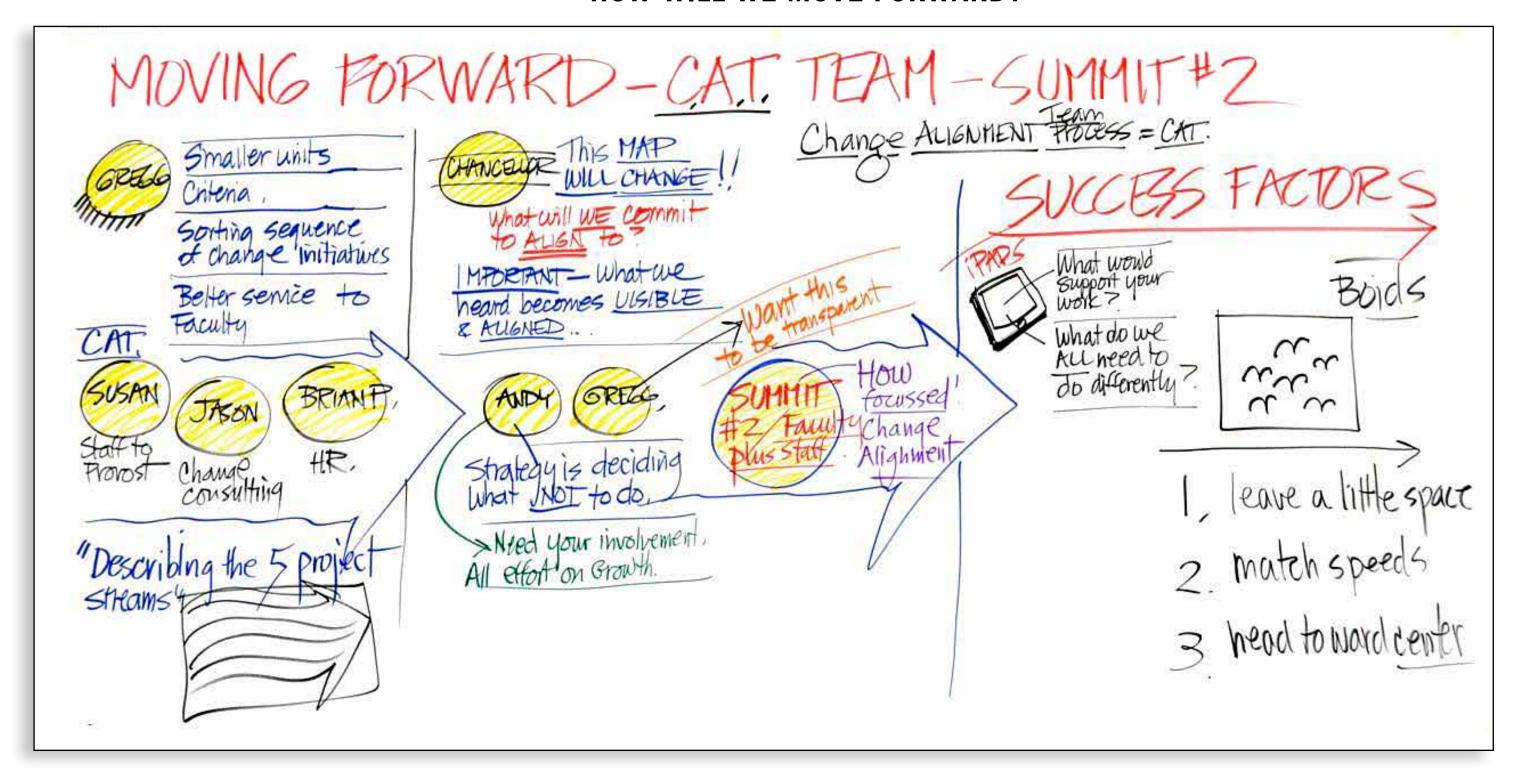


HOW ARE WE GOING FORWARD?





HOW WILL WE MOVE FORWARD?



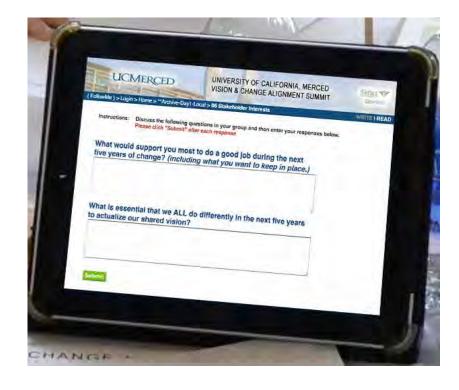
The members of the CAT reviewed the project streams (prior pages) and then the Chancellor, Andy Boyd, and Gregg Camfield explained about the virtual summit in two weeks and the focus of Summit #2, which will be a combined faculty and staff summed to focus on change alignment. As a bridge to the final activity looking at success factors, David shared a story about the research on living systems that suggests that simple "rules" and processes lead to the complexity we see in the natural world. As an example he explained the three rules that govern the flight of birds the famous artificial intelligence simulation called "boids."

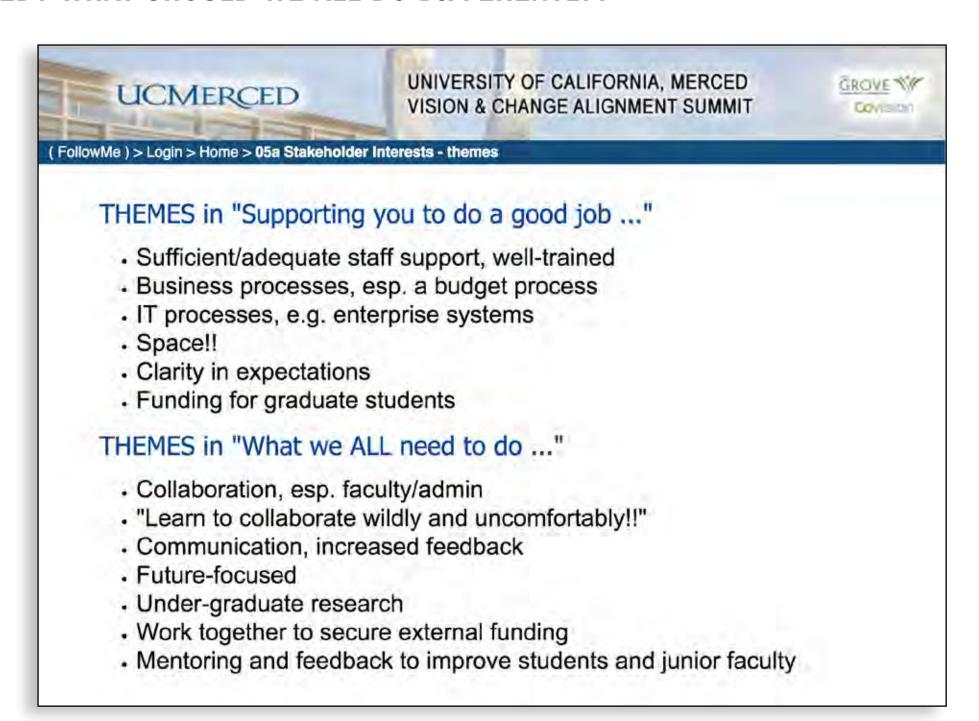


SUPPORT NEEDED? WHAT SHOULD WE ALL DO DIFFERENTLY?

A final input round asked everyone to identify what would support faculty doing a good job, and what does everyone need to do differently going forward.

On this page are the themes that came from the input on these two questions.





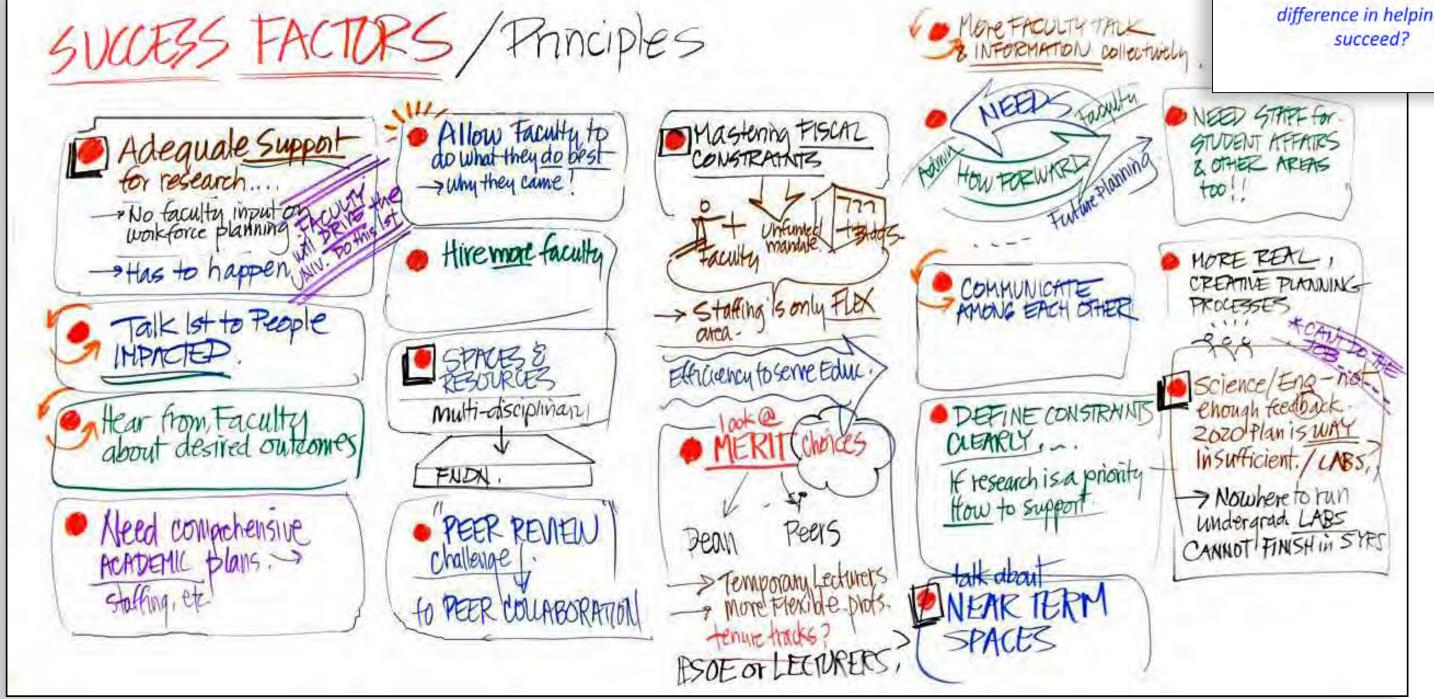
Following the overview of the next steps in the visioning change alignment process, everyone answered the questions shown here. The theme team identified the themes shown above.



SUCCESS FACTOR CONVERSATION

3rd TOWN HALL QUESTION

Given what we all are saying, what will make the **biggest** difference in helping us succeed?



These general principles were sharing by the assembled faculty participants as being crucial for the overall success of UC Merced's change process.



CRUCIAL CONVERSATIONS



As the success factors conversation began the challenge of staffing research at the University was raised. "Without staffing and labs we can't function." This ignited a candid sharing between faculty and administration about the real constraints the campus faces at this time. Many felt that decisions had been taken without enough consultation. Others commented about the challenge of getting faculty participation. The smaller size of the faculty summit actually facilitated a very engaged and active interchange, a fact appreciated by many.







TAKEAWAYS



As a closing activity, Gisela invited everyone to go around and share their takeaways. They are recorded here. At the end Chancellor Leland gave thanks to everyone "from the bottom of my heart." It was a lot to ask everyone to take a full day for this conversation, but many said it was important. "This is the conversation I've been waiting for," concluded Michael Reese.

