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 its growth goal of 10,000 students 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.

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.

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.

Chancellor 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.
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 reviewed 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.
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.
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 in-room 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.
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).

**TOWN HALL CONVERSATION**

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

**WHAT SEEMED SPECIAL? — WHAT NEEDS TO CHANGE?**

<table>
<thead>
<tr>
<th>1ST TOWN HALL QUESTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Given the themes that have been identified, which do we have to understand and explore further?</td>
</tr>
</tbody>
</table>

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:

1. 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.
3. 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.
6. In the small group work, make sure that everyone has a chance to participate.
WHY CHANGE? — WHAT DO WE NEED TO UNDERSTAND AND EXPLORE?

Comment screens like this were available to on-line participants during every town hall exchange.

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.
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.
Gregg concluded the review of the vision draft with some reflections about what it means to be a culture of inquiry, discovery, and learning. “How can we get beyond our structure of silos” he asked?
**HOW DO SYSTEMS CHANGE?**

**GUIDED IMAGERY VISIONING**

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 imag- ined. 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

2021 Conference Presentation Instructions

1. Imagine you are presenting to a conference about the success of UC Merced. What is the conference?
2. BRAINSTORM: Jot down ideas arising from the guided imagery exercise
3. HEADLINES: What are the headlines of the big slides you are presenting that highlight the most important accomplishment.
4. SIDEBARS: Note special-interest stories
5. IMAGES: Sketch in images that you imagine are key to understanding the success of UC Merced
6. QUOTES: What are others saying that you want to use in your presentation.
7. COVER: Record the title page and image of your presentation here.
8. PRESENTATION: Plan a creative presentation to convey your story to the larger group. Remember—you know what happened!

TIPS
- Choose an important conference
- Encourage a yes-and frame of mind. All ideas are welcome!
- It’s okay to skip around on the graphic template
- Speak from the future in a past tense - assume you know what happened
- Okay to have multiple people drawing
- When in doubt, make something up!

After the guided imagery activity, group of 3-4 at each table shared their visions from 2020 and recorded their ideas on this Graphic Template indicating elements that would be included in a conference presentation. Shown here are several of the tables at work.
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.
Following the table template exercise, everyone shared some of the themes that came out of the conversations.
CONFERENCE PRESENTATIONS, Continued

SECOND INPUT QUESTION -
“What vision themes would ignite our SHARED attention and engagement?”

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

Here are some additional themes shared in the group conversation.
POTENTIAL SHARED VISION THEMES

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.
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

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.

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.
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.
Brian explained the people planning & development track and the organizational design & educational improvement stream. This latter one was named to emphasize the important of having the organizational processes truly support educational results.
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.”
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.

**THEMES in "Supporting you to do a good job ..."**
- Sufficient/adequate staff support, well-trained
- Business processes, esp. a budget process
- IT processes, e.g. enterprise systems
- Space!!
- Clarity in expectations
- Funding for graduate students

**THEMES in "What we ALL need to do ..."**
- Collaboration, esp. faculty/admin
- "Learn to collaborate wildly and uncomfortably!!"
- Communication, increased feedback
- Future-focused
- Under-graduate research
- Work together to secure external funding
- Mentoring and feedback to improve students and junior faculty
SUCCESS FACTOR CONVERSATION

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.
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.