

# VISIONING SUMMIT II

@ Gallo Gymnasium — April 21, 2016

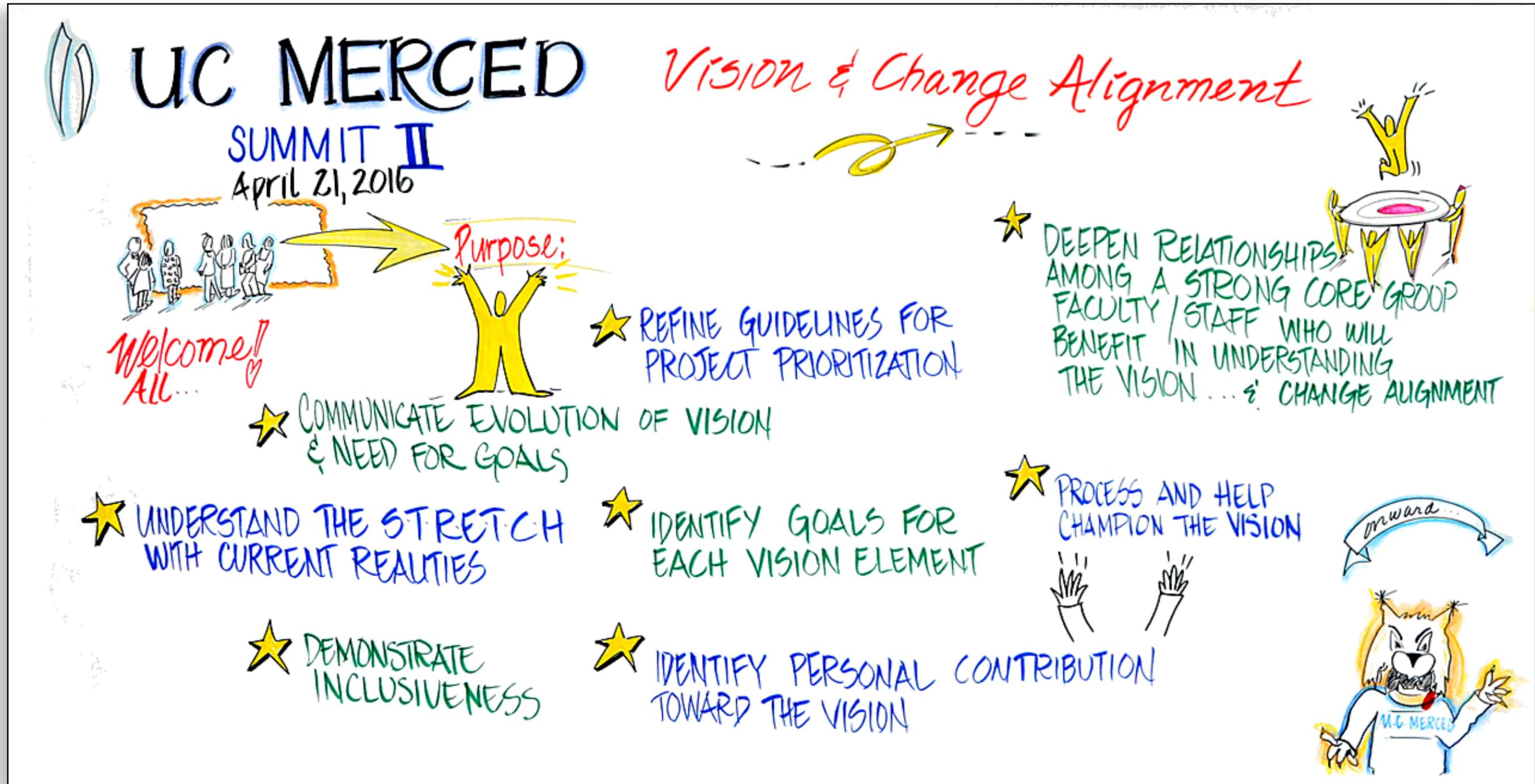


This report documents the second Summit gathering in the Visioning & Change Alignment process UC Merced has been conducting to align people on the many change initiatives currently in process, and to help co-create a real vision for UC Merced. This meeting involved both faculty and staff. Like the first summit, all presentations streamed to persons on campus who chose to participate on-line, providing input on the same Covision platform using in the gym. The purpose of this Summit II was to review the changes in the vision and to agree on guidelines for prioritization of projects and the movement to action. This panorama shows the entire gathering, and the support teams to the right that made it possible to have a networked event. For further information on this meeting, please contact Brian Gresham (Director of Financial Planning and Administrative Operations) is a member of the Change Alignment Team (CAT) that is guiding the process.

CONFIDENTIAL Report by:



## SUMMIT II PURPOSE



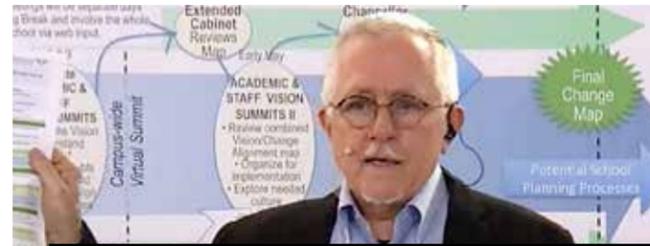
The CAT (Change Alignment Team) augmented by several cabinet members (Marjorie Zatz, Jill Donner, Charles Nies, and Donna Jones) and The Grove consultants, designed this summit. The agenda and Vision Map were reviewed by the Chancellor and Provost earlier in the week so that everyone was aligned. These are outcomes that everyone agreed reflected the purpose and goals of Summit II. Charts in this report were created by Kathy Evans, a graphic recorder working with The Grove.

**PARTICIPATE IN THE SUMMIT MEETING ONLINE**

This site provides a live video stream from the Vision Summit-II meeting in the Gallo Gymnasium. Here you can follow the proceedings and then contribute your ideas in the same way as participants in the meeting room. Most webpages at right below include a video stream window, followed by instructions and input boxes for your comments.

- If you come to the meeting after it's begun, look down the timeline at left below and click the corresponding link at right to join the correct input screen.
- Many screens will ask for your stakeholder group for each response. This is so the data can be parsed more meaningfully later. If your group is mixed, you can indicate that too.

Schedule	Stream & Input Screens
8:30 - Orientation to Purpose	01 Opening Video Stream
9:00 - What did we hear?	
9:30 - Further Input on the Vision	02 Engagement Cycle 03 Input Screen
10:00 - New Activities and Attitudes	04 Themes 05 Town Hall Dialogue
10:30 - Morning Break	
10:45 - Grounding the Vision in Clear Goals	06 Instructions & Input
11:00 - Identify Goals & Contributions by Vision Element	
11:50 - Guiding Change Together	07 Themes 08 Town Hall Dialogue
12:15 - Lunch	
1:15 - Guidelines for Prioritization	09 Instructions & Input
1:35 - Understanding Guidelines for Action	
2:50 - Dialogue on the Importance of Guidelines	10 Themes 11 Town Hall Dialogue
2:30 - Afternoon Break	
2:45 - Owning the Vision	12 Video Stream
2:50 - Reflection on Personal Contributions	13 Personal Contributions 14 Themes
3:15 - Moving Into Action - Two Cases	15 Other Comments?
3:35 - Next steps	
3:45 - Takeaways	
4:00 - Adjourn	



# ORIENTATION & AGENDA

David Sibbet led off the Summit orienting the on-line participants to the agenda and links to streaming video (chart on right), as well as to the two page agenda at everyone's seat in Gallo Gymnasium. Members of the Change Alignment Team are listed below, as well as the support consultants.




## VISION & CHANGE ALIGNMENT SUMMIT AGENDA Thursday 4.21.16

**MEETING PURPOSE AND OUTCOMES**

1. Communicate **EVOLUTION** of the **VISION** and **NEED FOR GOALS**
2. Understand the **stretch** with **CURRENT REALITIES**
3. Identify **GOALS** for each **VISION ELEMENT** and explore **FUNCTIONAL CONTRIBUTIONS**.
4. Refine **GUIDELINES FOR PROJECT PRIORITIZATION** in as a way of grounding the vision elements.
5. Identify **PERSONAL CONTRIBUTIONS** toward the vision.
6. Deepen relationships among a strong core group of faculty and staff who will benefit from understanding the Vision & Change Alignment Process and help **CHAMPION ITS IMPLEMENTATION**
7. **DEMONSTRATE INCLUSIVENESS:** Hear and document input from critical UC Merced stakeholders.

TIME	TOPIC	DESCRIPTION (WHITE: Presentation, GREEN: Covision input, BLUE: Town hall dialog)
8:30	Gathering- Gallo Gymnasium-Lake Campus	
8:30	<b>ORIENTATION</b>	• Welcome & Purpose; Introduce facilitation team - Chancellor & Provost • Review Outcomes, Agenda, Roles and Rules
9:00	<b>WHAT DID WE HEAR?</b>	• Key messages heard during Summit I - Michael Reese and Erik Rolland • Review of near final version of the Vision & Change Alignment Map
9:30	<b>FURTHER INPUT ON VISION</b>	• Table group answer questions posed on iPad using Covision platform
10:00	<b>NEW ACTIVITIES &amp; ATTITUDES</b>	• Theme team reports - in-room and from satellites • Town Hall-style reflections on further input on vision; general dialogue with microphones
10:30		Break
10:45	<b>GROUNDING THE VISION IN CLEAR GOALS</b>	• Introducing the next activity of imagining functional goals and contributions for each vision element
11:00	<b>IDENTIFY GOALS &amp; CONTRIBUTIONS BY VISION ELEMENTS</b>	• Table groups work with Goals & Contribution graphic template and answer questions posed on iPad using Covision platform
11:50	<b>GUIDING CHANGE TOGETHER</b>	• Theme team reports - in-room and from satellites • Town Hall-style reflections on exercise and insights about establishing priorities; general dialogue with microphones
12:15		Lunch
1:15	<b>REVIEW &amp; FINE TUNE GUIDELINES FOR PRIORITIZATION</b>	• Provost and Michael Reese will speak to how the guidelines for project prioritization originated from the Summit I • Review initial definition of each guideline and how they might be applied • Invitation to refine guidelines together
1:35	<b>UNDERSTANDING GUIDELINES FOR ACTION</b>	• Table groups work on guidelines and indicators and answer questions posed on iPad using Covision platform

UC MERCED SUMMIT II PROGRAM 2

2:00	<b>DIALOGUE ON THE IMPORTANCE OF GUIDELINES</b>	<ul style="list-style-type: none"> <li>• Leadership theme team reports - in-room and from satellites</li> <li>• Leadership reflections and town Hall dialogue on guidelines for prioritization and indicators</li> </ul>
2:30	Break	
2:45	<b>OWNING THE VISION</b>	• Gregg Camfield talks about how everyone is central to the success of the university
2:50	<b>REFLECTION ON PERSONAL CONTRIBUTIONS</b>	• Individuals identify personal contributions and share answers at table and on Covision platform
3:10	<b>CONTRIBUTION THEMES</b>	• Theme team reports - in-room and from satellites
3:15	<b>MOVING INTO ACTION – TWO CASES</b>	<ul style="list-style-type: none"> <li>• <b>Transformative Education: Pedagogical and Curricular Innovation</b> - Elizabeth Whitt</li> <li>• <b>Excellence in Research: Pre-doctoral and Dissertation Fellowships</b> - Marjorie Zatz</li> </ul>
3:35	<b>NEXT STEPS</b>	<ul style="list-style-type: none"> <li>• Schools - Gregg Camfield</li> <li>• Staff functions and Change Alignment Project - Michael Reese</li> <li>• University-wide - Chancellor Leland</li> </ul>
3:45	<b>TAKEAWAYS</b>	• Participants share takeaways
4:00	Adjourn	

**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  
 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**  
 Gisela Wendling, Director of Global Learning, The Grove—facilitation  
 David Sibbet, President of The Grove Consultants International—facilitation  
 Kathy Evans, Graphic Recorder, The Grove—graphic recording  
 Lenny Lind, Covision, Chairman, Founder—Covision electronic input platform  
 Ed Villavicencio, Covision—Technical Director  
 Adam Sachs—Technical Coordinator  
 Kevin Wright, Kevin Wright Productions—A/V set-up, video streaming  
 Kim Garner, Chief of Protocol & University Events Manager—facility logistics

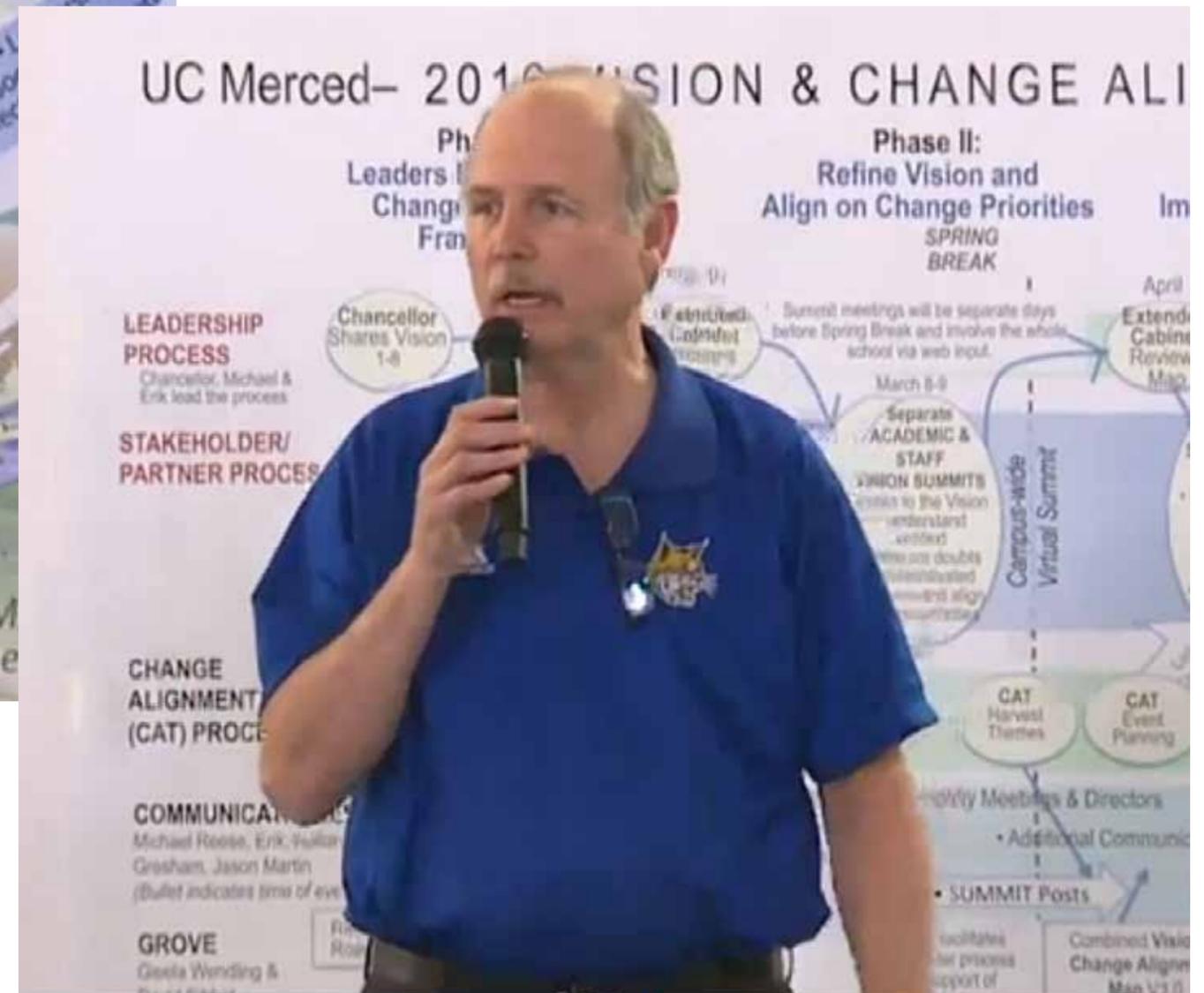
**ONGOING WEB SITE COMMUNICATION**  
 Instructions on how to connect for ongoing news about the Visioning & Change Alignment Project can be found at a dedicated website, <http://bfsi.ucmerced.edu/2020Vision>.

## WELCOME AND PURPOSE



Chancellor Dorothy Leland opened the Summit with a warm welcome and invitation to people in Gallo and on-line to participate fully. She complimented the Change Alignment Team for “being busy,” and underlined her and leadership’s desire for input. He underlined that this is an evolving process, and that identifying nearer terms goals and contributions people can make to these is the next step.

Provost Tom Peterson began by praising this project as “on budget and on schedule.” He noted the great degree of alignment that he heard at the last summit and is reflected in everyone’s work on this Summit, and looks forward to grounding the vision in implementable projects.



# WELCOME AND PURPOSE

## WELCOME and PURPOSE ♥ SUMMIT II



**CHANCELLOR  
DOROTHY LELAND**

"The change Alignment Team  
has been busy"  
We want your INPUT

**VICE CHANCELLOR  
MICHAEL REESE**

"Look at the Guidelines  
and thanks for your  
participation"

**PROVOST  
TOM PETERSON**

"Project is  
on budget  
and on  
schedule  
(write this down)"  
"We are  
aligned"

**DAVID  
SIBBET**

"We will look  
at current  
realities ...  
GOALS...  
IMPLEMENTATION..."

"Your Personal Contribution  
is asked for..."

On-line input...

AN INTERACTIVE PROCESS

"LISTEN WITH CURIOSITY"



**GISELA WENDLING**

"Welcome back!  
I'll help you move through  
the day"

**LENNY LIND  
CO-VISION**

"We will dialogue  
through on-line  
technology ...  
PATTERNS  
BIG MESSAGES"

This chart outlines the different speakers that "framed" the work of the Summit. Michael Reese and Erik Rolland headed up the CAT. Gisela Wendling and David Sibbet led The Grove Consultants International facilitation team. Lenny Lind head up a Covision digital input team.

## AGENDA AND GROUND RULES



**UCMERCED // SUMMIT II ~ April 21, 2016 Gallo Gym**

### ● AGENDA

TIMES	ACTIVITIES
7:30	Arrive & Set-up
8:15	Gathering Hello!
8:30	Orientation to Purpose Reflection on Summit
9:00	WHAT DID WE HEAR?
9:30	Overview, Change Alignment MAP, PURPOSE
10:00	New Activities & Attitudes
10:45	GROUNDING THE VISION in clear goals, prioritize goals.
11:00	GOALS & CONTRIBUTIONS by VISION ELEMENTS
11:50	Guiding CHANGE together
12:15	LUNCH
1:15	Review & fine-tune GUIDELINES / responses
2:30	BREAK
2:45	Owning the Vision
2:50	Reflection on Personal Contributions
3:10	CONTRIBUTION THEMES / report out
3:15	Moving into Action
3:35	NEXT STEPS / TAKE AWAYS

### ● ROLES

- Chancellor & Provost - SPONSORS
- Michael Reece - LEADERS of Change Alignment TEAM
- Erik Rolland - GROVE Consultants
- Gisela Wendling - Co-Vision Platform
- David Sibbet - AV
- Lenny Lind - AV
- Kevin Wright - AV
- Cabinet & CAT - Agenda Design
- R. Evans - Graphic Recorder

### ● OUTCOMES

- Demonstrate Inclusiveness
- Champion Implementation
- Communicate Evolution of VISION & NEED FOR GOALS...
- Understand the STRETCH With Current Realities
- Identify goals for each Vision Element; Explore functional contributions
- Refine GUIDELINES for Project Prioritization to ground VISION elements
- Identify personal contributions toward the VISION
- Deepen Relationships among strong core group / faculty & Staff understanding VISION. CHANGE ALIGNMENT process...

### ● RULES

- KEEP YOUR COMMENTS FOCUSED
- LEAVE ROOM FOR OTHERS TO STEP FORWARD & STEP BACK
- ENJOY THE PROCESS!
- LISTEN FOR UNDERSTANDING
- WHEN UNCLEAR, ASK QUESTIONS
- SPEAK YOUR PERSONAL TRUTH
- PARTICIPATE WITH AN ATTITUDE OF CURIOSITY
- EMAILS & TEXTS / CHECK AT BREAKS

After welcomes and David's review of the agenda, Gisela Wendling, the lead facilitator in the Summit, explained the ground rules that would help make Summit II a success. She underlined the importance of participating with an attitude of curiosity. These conversations and gatherings ignite new ideas and interests and it is important to listen for understanding and engagement.

## SUPPORT TEAMS



**THE GROVE CONSULTANTS INTERNATIONAL:** David Sibbet, founder of The Grove and Gisela Wendling, Ph.D., VP of Global Learning, led The Grove team in helping design, facilitate and document the process, including the infographic design of the large Storymap murals that illustrated the vision and the various graphic templates used in the process.

**COVISION:** Lenny Lind, founder of Covision, introduced his team of Ed, Adam and Freddie (shown left). They provided iPads for every three participants at Gallo Gymnasium, and managed the on-line version of the summit that would be available on browsers, with the same questions and input screens as used for people in the gym, plus providing a post summit report with all the input data.

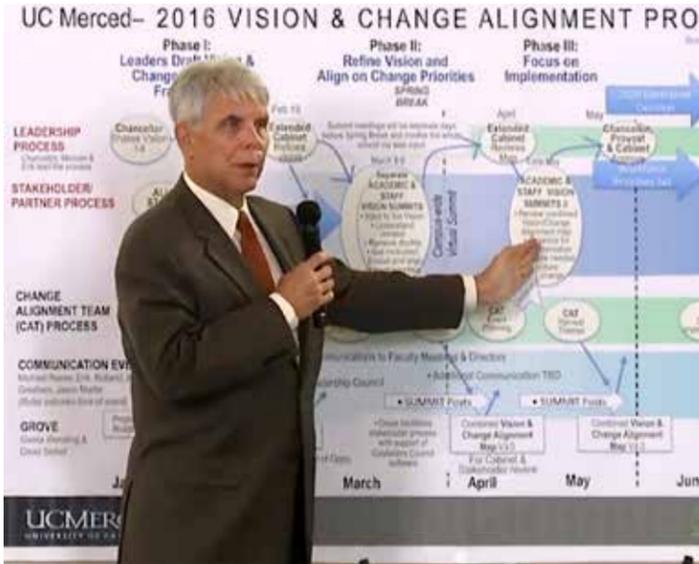


**KEVIN WRIGHT:** Kevin (fifth from right) assembled a video and audio crew and his lead video producer Tim (left above), to orchestrate both the in-room media and the streaming on-line media. Anyone who wanted to link into the Summit could participate real time and see all the presentations. They also managed the traveling microphones and presenter headsets.

**KIM GARNER:** UC Merced's event and key meeting coordinator led a group of students and helpers who managed a lovely, supportive space for everyone, including lunch and break snacks.



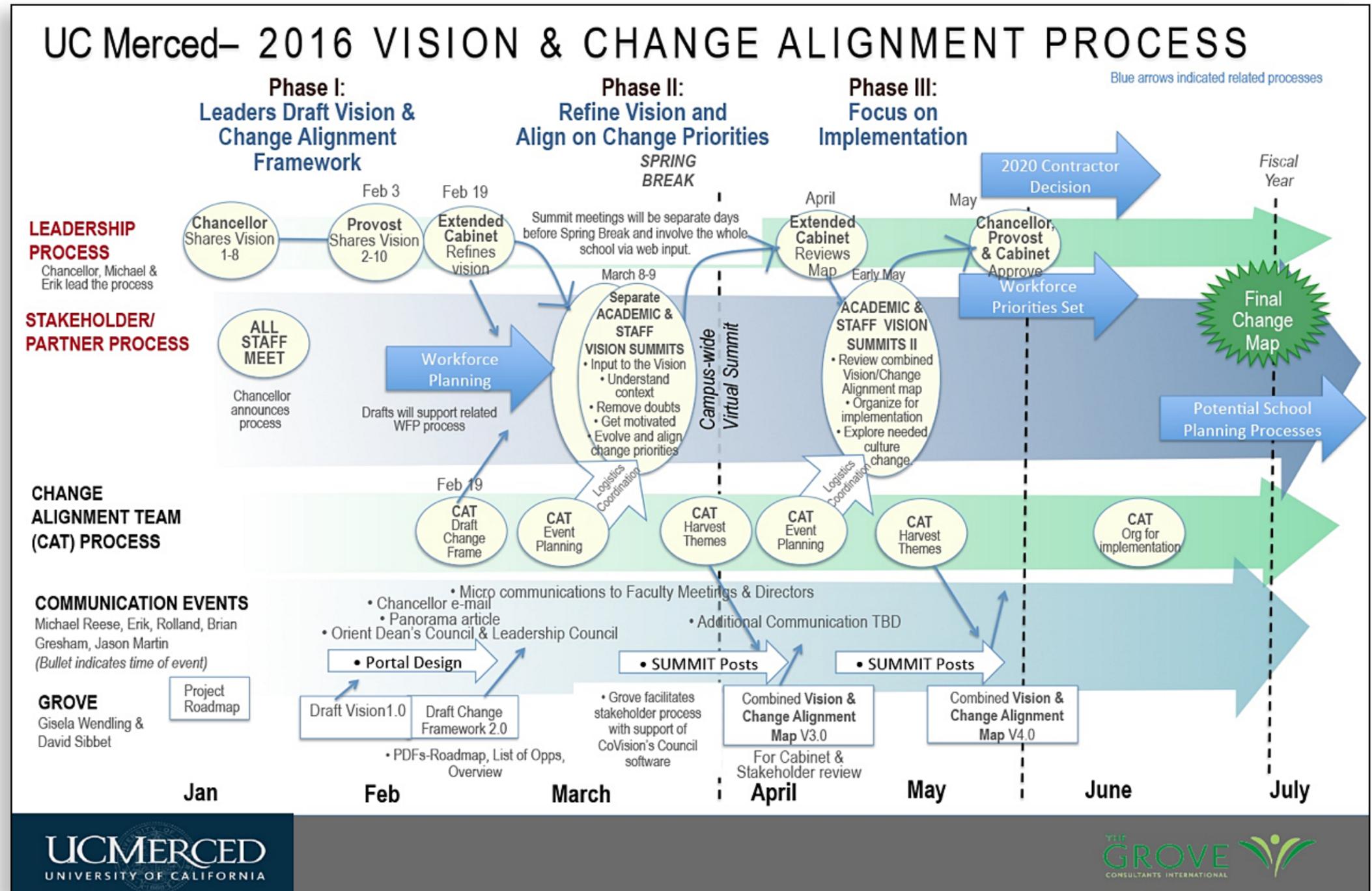
# VISION & CHANGE ALIGNMENT PROCESS OVERVIEW



Michael next provided an overview of the 2016 Vision & Change Alignment Process and its tracks of activities. The yellow circles represent the different meetings. He is show above pointing to the large Summit II part of the graphic. He like the Provost, underlined how well the process has been running (one time and on budget).

Yet to go is a review by the Cabinet based on Summit II input, and a follow-up application of the guidelines to FY 2017 change project by the Change Alignment Team (see members on page 3).

This map has been guiding the CAT in leading this effort.



## VISION & CHANGE ALIGNMENT MAP- UPDATED

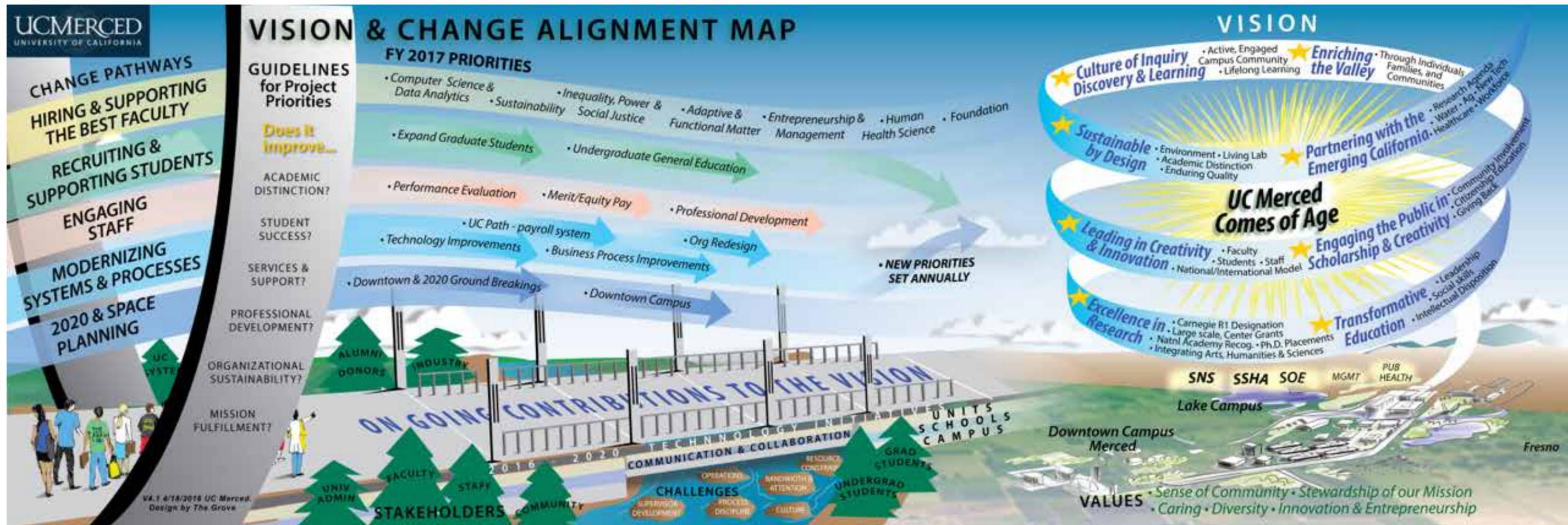


Michael Reese (left) Vice Chancellor for Business and Administration and Erik Rolland (right), management faculty, and are the co-leaders of the CAT and of the process that has been evolving the map shown below. Erik began with an overview of the vision spiral.

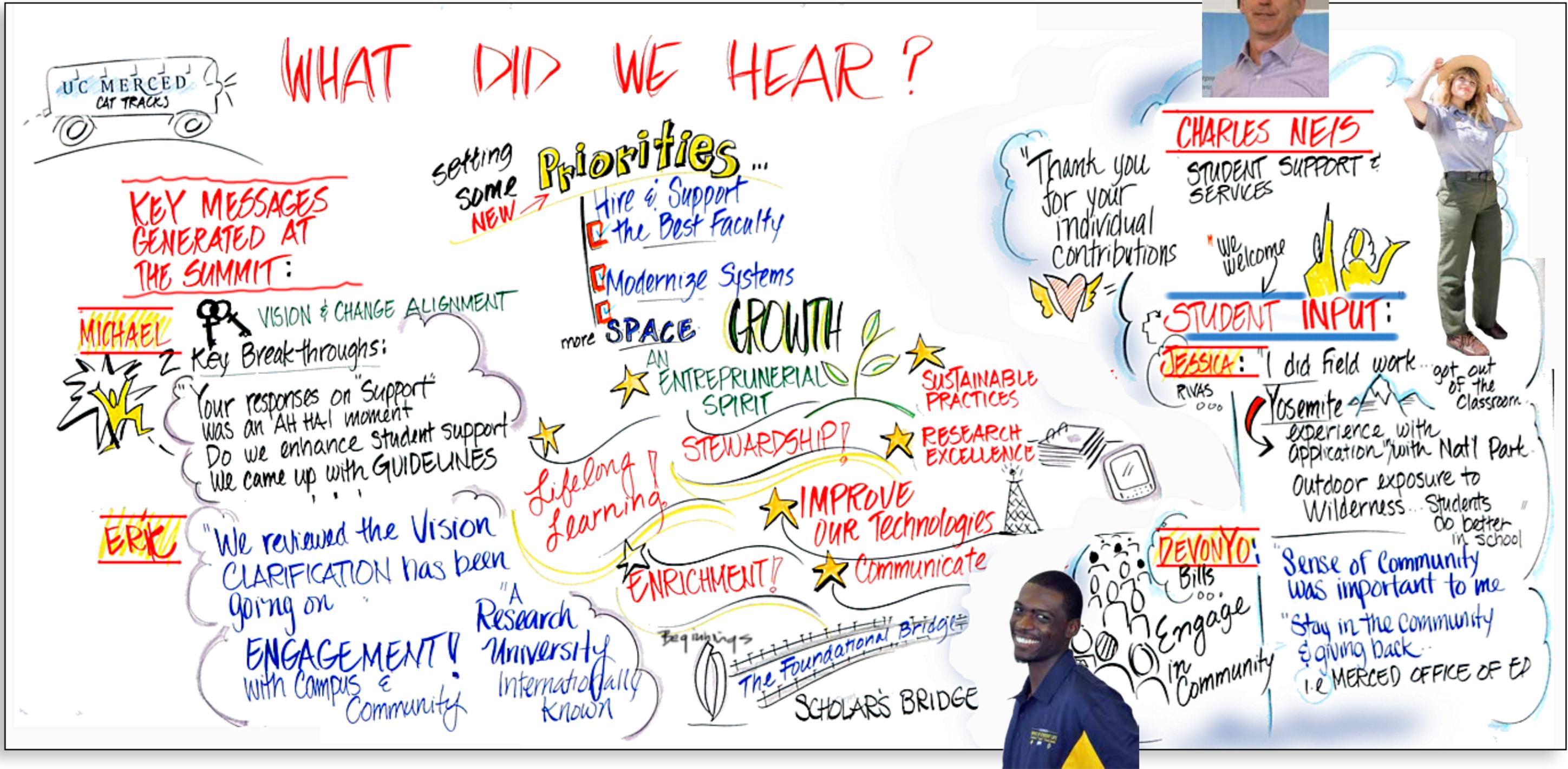
“This, we realized, isn’t a 2020 vision, but a long-term vision, a real vision for our University,” he began, “so we took off the 2020 date. The foundation of our vision is the research and education ribbon, which then spirals up through creativity and innovation, public engagement, sustainable designing and partnership with an emerging California to support a culture of inquiry discovery and learning that will enrich the valley and beyond. He pointed out how being an international model was added, as was “diversity” to the value that underlie the vision. The “transformative education” vision element was added since the last Summit upon review and input from faculty about the importance of emphasizing the bottom line educational purpose of the University.



Michael Reese explained the CAT’s breakthrough with identification of guidelines that would help prioritize the five streams of change initiatives, or “pathways, that would carry people toward the vision, with many specific projects already moving and mapped. The guidelines provide a “beginning” to the process (mapped onto the Beginnings statue). Also important is the ongoing life and quality of the university, illustrated as crossing Scholars Bridge, whose infrastructure of communication, collaboration and technology help support ongoing progress.

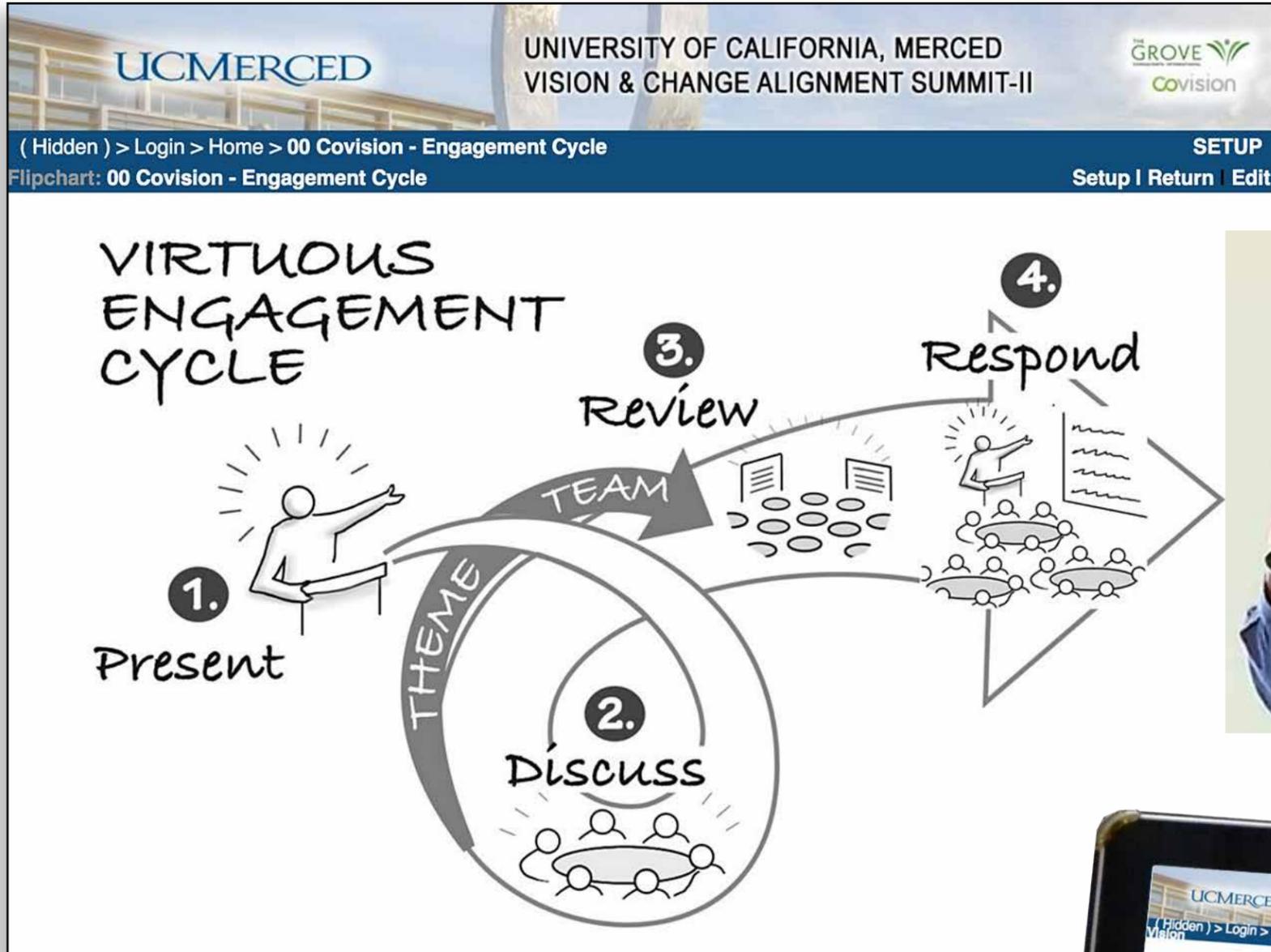


## WHAT DID WE HEAR AT THE LAST SUMMIT?

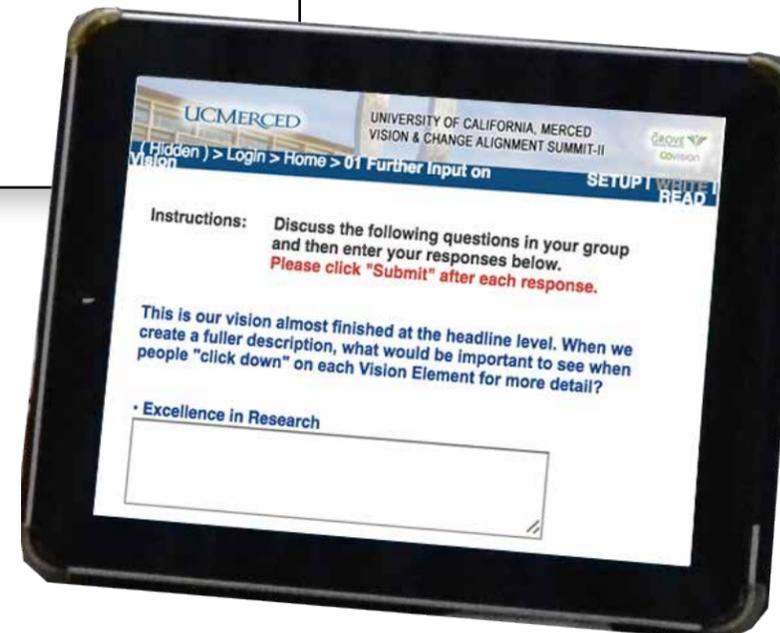
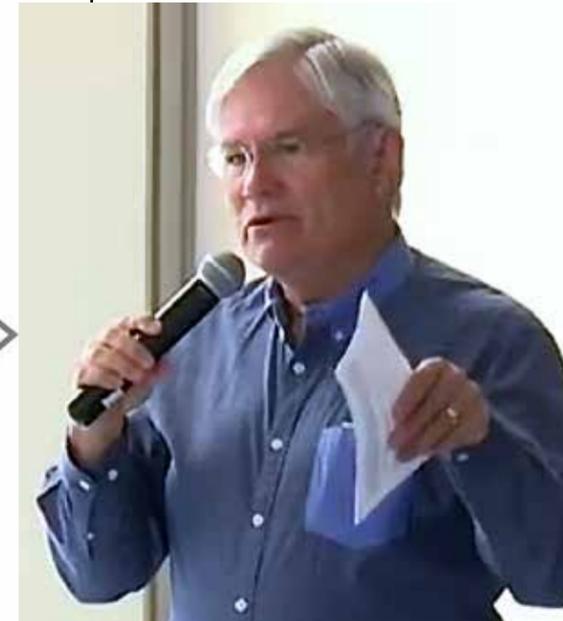


This chart records some of the comments made by Erik and Michael as they reviewed the new Vision & Change Alignment Map. Then as a symbolic bridge to looking more closely at both the vision and the change alignment guidelines, Charles Nies came up to introduce two students, Jessica Rivas, and Devonyo Bills, who shared stories of how meaningful their education at UC Merced was already. Jessica related the important impact of her Yosemite experiences. Devonyo talked about his chance to stay in the community and give back.

# COVISION INPUT PROCESS & QUESTIONS



LENNY LIND, founder and President of Covision.



UCMERCED UNIVERSITY OF CALIFORNIA, MERCED VISION & CHANGE ALIGNMENT SUMMIT-II

( Hidden ) > Login > Home > 01 Further Input on Vision SETUP | WRITE | READ

Instructions: Discuss the following questions in your group and then enter your responses below. Please click "Submit" after each response.

This is our vision almost finished at the headline level. When we create a fuller description, what would be important to see when people "click down" on each Vision Element for more detail?

- Excellence in Research
- Transformative Education
- Leading in Creativity and Innovation
- Engaging the Public in Scholarship and Creativity
- Enriching the Valley
- Culture of Inquiry, Discovery & Learning
- Sustainable by Design
- Partnering with the Emerging California

What NEW activities and attitudes would we expect to see if we are living the vision?

Your stakeholder type  
Please select

Following the presentations of the vision and the student stories, the Summit II participants had a chance to reflect. Lenny explained the "Virtuous Engagement Cycle" that would be followed in the summit. Questions, like the one shown on the iPad image to the right, are pushed out to everyone who have a chance to discuss in small groups, putting answers into the Covision platform. (The full list of questions is shown to the right). Both the on-line and in-room participants saw similar screens. This input was then reviewed by a "Theme team" from UC Merced, and responded to in a town hall process by the group as a whole. This pattern will repeat several times.

All of the questions above were visible in the scrolling browser window.

UNIVERSITY OF CALIFORNIA, MERCED  
VISION & CHANGE ALIGNMENT SUMMIT-II

GROVE  
COVISION

( Hidden ) > Login > Home > 01 Further Input on Vision - themes  
Flipchart: 01 Further Input on Vision - themes SETUP  
Setup | Return | Edit

**THEMES in "Further vision input ..."**

**Excellence in Research**

- Regionally relevant research (noted across the vision elements)
- "Cutting edge"
- Recognition from outsiders, awards, etc.
- Increasing diversity of research
- Engaging undergraduate students and the community

**Transformative Education**

- It's not just an education but becoming a productive member of society
- Connecting the curricular and co-curricular portions of education experience
- Providing skills for thinking and becoming life-long learners

**Leading in Creativity & Innovation**

- Faculty, staff and students innovating *together*
- Open-mindedness in generating ideas for changing the world
- "A fresh expression of the UC tradition"

**Engaging the Public in Scholarship & Creativity**

- Open to the public, more intentional inclusiveness
- Continued development of extension

**Enriching the Valley**

- Encouraging retention of graduates within the valley; building pipelines
- Local partnerships

Here are the themes that arose from the first round of Covision input about the vision itself. Gregg Camfield reported for the Theme Team.

## VISION THEMES & NEW ACTIVITIES

### Culture of Inquiry, Discovery & Learning

- Encouraging conditions for life-long learning
- Connecting staff with inquiry, discovery and learning
- Mixing theory and practice

### Sustainable by Design

- Think outside the box of "sustainability"
- Comprehensive sustainability, e.g. financial, academic, environmental, space, etc.

### Partnering with the Emerging California

- Developing partnerships with government agencies and businesses to further research and innovation
- Pipelines and pathways to emerging businesses, for graduates

### THEMES in "New activities and attitudes ..."

- Reimagine introductory classes
- Stronger links with pre-college and adult activities
- "Processes that make directions and goals explicit in order to promote collaboration, continuity and realistic assessment of available research"
- Put women on the Theme Team! (two absent this morning)
- Thoughtful on-boarding of staff and faculty, e.g. monthly events
- Leadership needs to set the examples, actions are visible
- Create more collaboration opportunities between faculty, staff and students
- Invite stakeholders into programs, instead of hoping they invite themselves
- More diversity among leadership

The question about what new activities and attitudes one can expect if everyone was living the vision generated another list of themes, and will inform further shaping of the values.



1ST TOWN HALL QUESTION

Given the themes in your input about activities and attitudes, what can we do to support each other to manifest these in how we do our work here?

NEW ACTIVITIES & ATTITUDES



Gisela facilitated a town hall dialogue around the question shown in the upper left of this page.



## GOALS & CONTRIBUTIONS TEMPLATE INSTRUCTIONS

2. Instructions for the group exercise, for reference ...

### Goal and Contributions Instructions

TAKE 30 MINUTES TO COMPLETE. NUMBERS INDICATE A GOOD SEQUENCE FOR THE WORK.

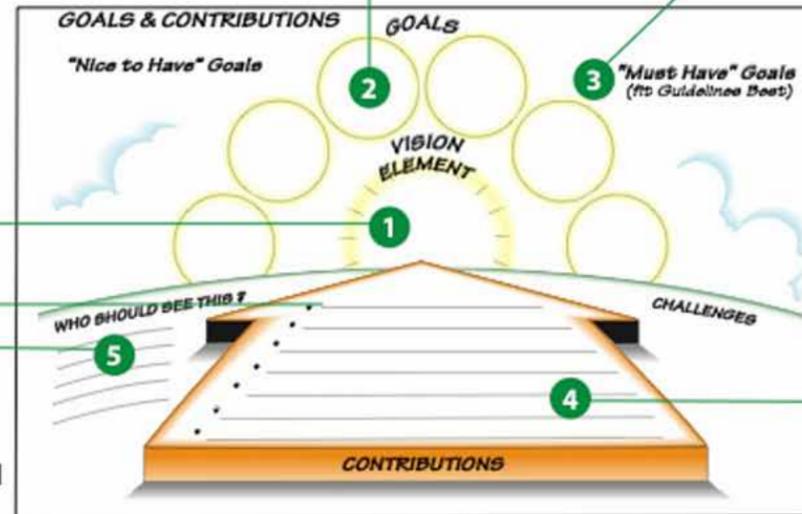
**1. VISION ELEMENT:**  
Write in the headline of the Vision Element you are working on.

**5. WHO SHOULD SEE THIS?:**  
List out what functional units in the University should see this chart and its idea

**2. GOALS:** Brainstorm goals that you can imagine achieving in two years-by 2018, using sticky notes.

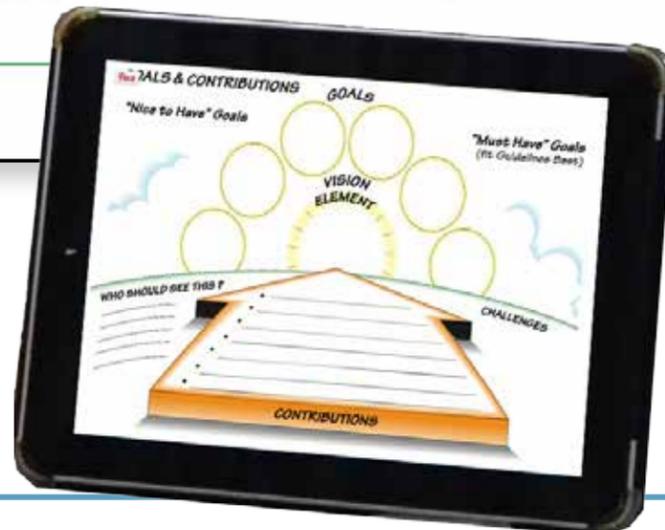
**3. SORT GOALS:**  
Using the Guidelines sheet at your tables for what things are important to be working on--see which goals rate the highest and put them on the "must have" side.

**4. CONTRIBUTIONS:**  
Share ideas of who should contribute what to achieve this goal. Make sure you include your functional unit but think about others as well.



- Write down all goal ideas as they occur on sticky notes. No need to agree at this point.
- Write SMART goals is possible: Specific, Measurable, Actionable, Relevant, and Timebound

- Use the Guidelines to determine which goals are "must haves"--i.e. the ones that best fit the most guidelines.
- If people mention challenges, note them on the right margin.



After a break, everyone was asked to return and join a table for the vision element that called to them. These were designated by signs on each table.

David Sibbet then explained the next part of the Summit would be a table group exploration of the Vision Themes by identifying tangible goals for the next two years, and imagining the kinds of contributions that would be necessary to actually move toward those goals.

A graphic template, shown here, was on each table. It was mirrored in a series of similar questions on-line.

**NOTE!** This page is set differently than the others - your data will persist on the page after you click "Save Changes" at bottom. So you can build your answers to the questions as a whole set. Please save your changes early and often!

**1. VISION ELEMENT - write the headline of the Vision Element you are working on**

**2. GOALS - brainstorm goals you can imagine achieving in two years, by 2018**

**3. SORT GOALS - use the 'Guidelines' sheet (above) to determine what is important to be working on; see which goals rate the highest and write them here as "must-haves"**

**4. CONTRIBUTIONS - share ideas of who should contribute what to achieve this goal; be sure to include your functional unit but think about others as well**

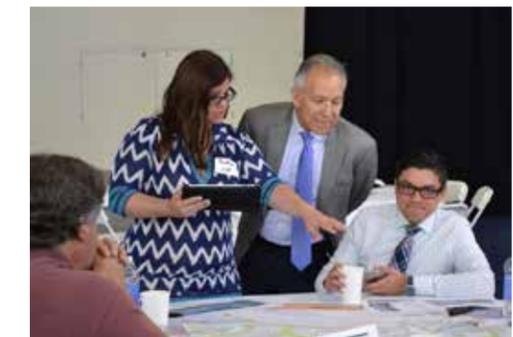
**5. WHO SHOULD SEE THIS? - list out what functional units in the University should see this chart and its idea**

Save Changes

Note: You may save changes as often as you like and your answers will stay on the page.



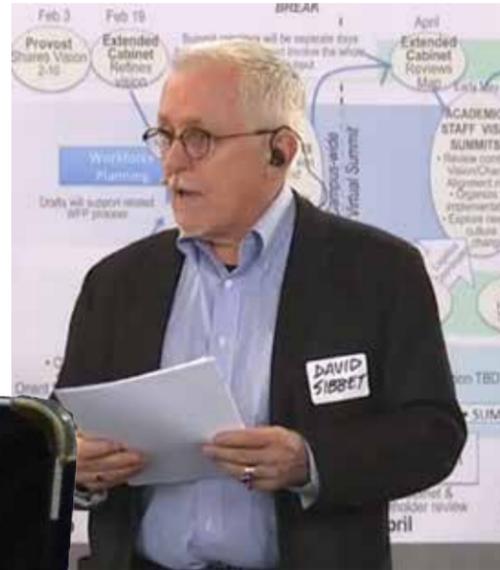
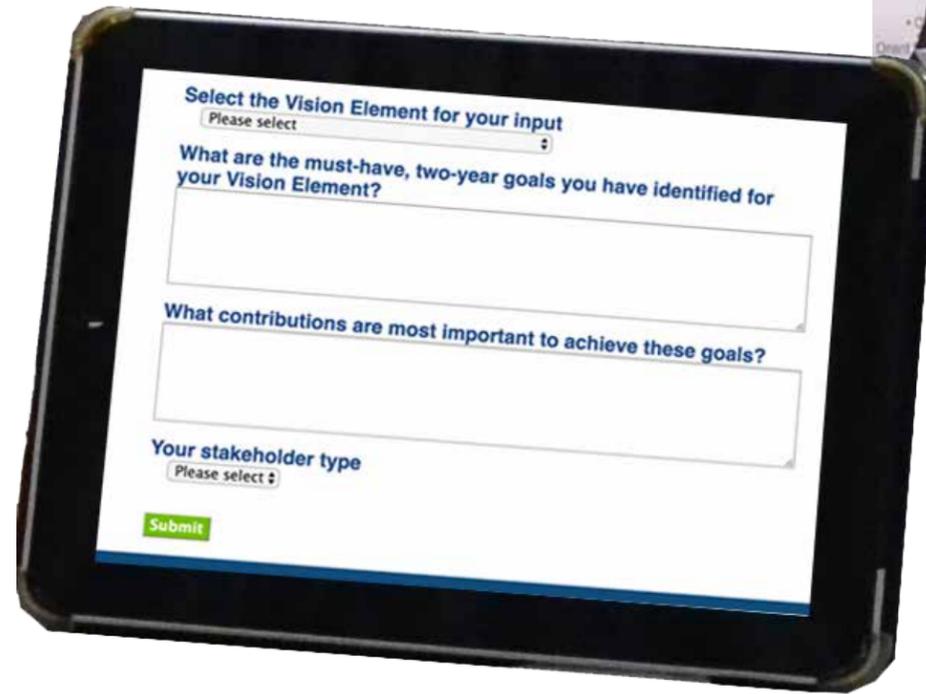
## GOALS & CONTRIBUTIONS GROUPS



Here are pictures of most of the table groups working at Gallo Gymnasium. All the leadership, Deans, a sprinkling of faculty, and many staff were present.

## IDENTIFYING “MUST HAVE” GOALS

In the last ten minutes of the table activity, everyone was asked to respond to the two questions below—sharing the “must have” goals they identified, and some of the important contributions needed to achieve them.



## THEME TEAM



As the table groups reviewed their graphic template work and answered the Covision questions, the Theme Team (shown above) reviewed both the in-room and on-line input. In the morning the CAT worked as the Theme Team, In the afternoon Cabinet members were recruiting to work with the input on guidelines.



## RANGE OF GOALS FOR THE VISION ELEMENTS

### A RANGE OF GOALS IN THE VISION ELEMENTS

(highlights, not themes in this case)

#### Excellence in Research

- Provide a research infrastructure, physical and staff

#### Transformative Education

- Reward faculty for innovative pedagogy
- Bring academics and student affairs together to create a robust living/learning community

#### Leading in Creativity & Innovation

- Promote leadership at all levels

#### Engaging the Public in Scholarship & Creativity

- Educate the public about UC Merced's research accomplishments

#### Enriching the Valley

- Multi-disciplinary committee focused on community relationships and outreach

#### Culture of Inquiry, Discovery & Learning

- Identify, dedicate and prioritize regular staff hours to planning and implementation that helps to inspire a culture of inquiry, discovery and learning

#### Sustainable by Design

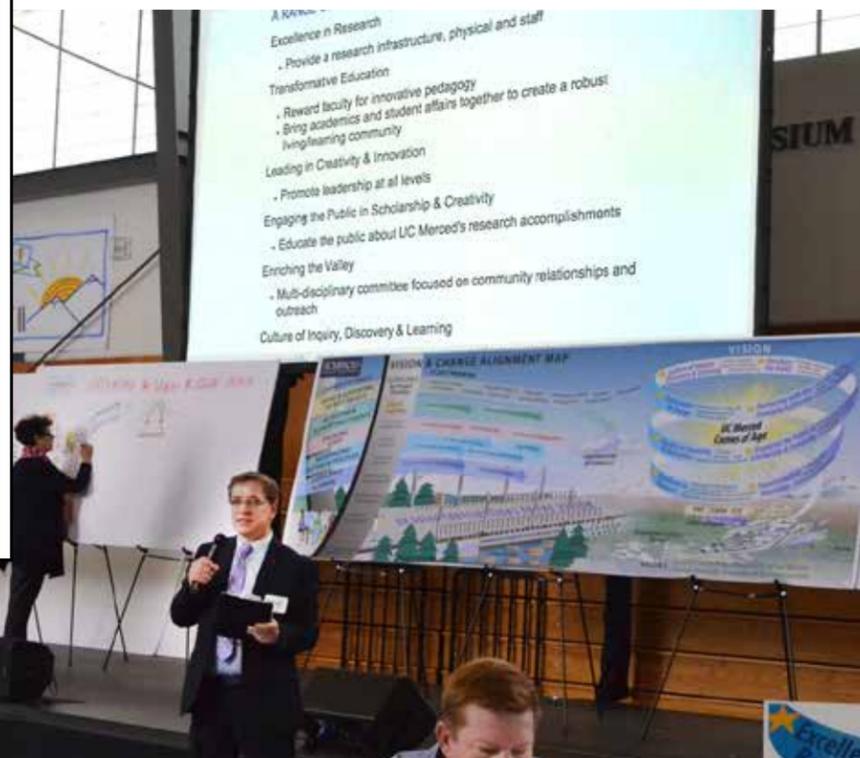
- Departments should evaluate and report annually how sustainable they are based on metrics; for example, financial, environmental and succession planning

#### Partnering with the Emerging California

- Seamless integration so that services and resources are accessible by the community



Erik Rolland represented the Theme Team and reported out on the range of goals identified. (These high level summaries are accompanied by full data sets in the on-line web site connected with the Visioning process).



Gisela next focused everyone on the big town hall question shown above in the photo. The inputs from the this conversation are illustrated on the following page.

The CAT hoped that this morning exercise would be helpful in giving people ideas about how to work with more focused goal setting at a school and unit level in the fall when more thinking would go into the immediate changes that are needed to make progress.

## LEARNING FROM THE GOALS & CONTRIBUTIONS WORK

# GROUNDING THE VISION IN CLEAR GOALS

**PURPOSE:**  
Responding to your request for clearer, more specific **GOALS**

**GOALS** transforms!

**GUIDELINES**  
CHOOSE THE GOALS AND SELECT THOSE THAT BEST SUPPORT the **GUIDELINES**

WHAT CAN YOU DO TO MAKE DISTINCTIVE CONTRIBUTIONS that informs our **VISION?**

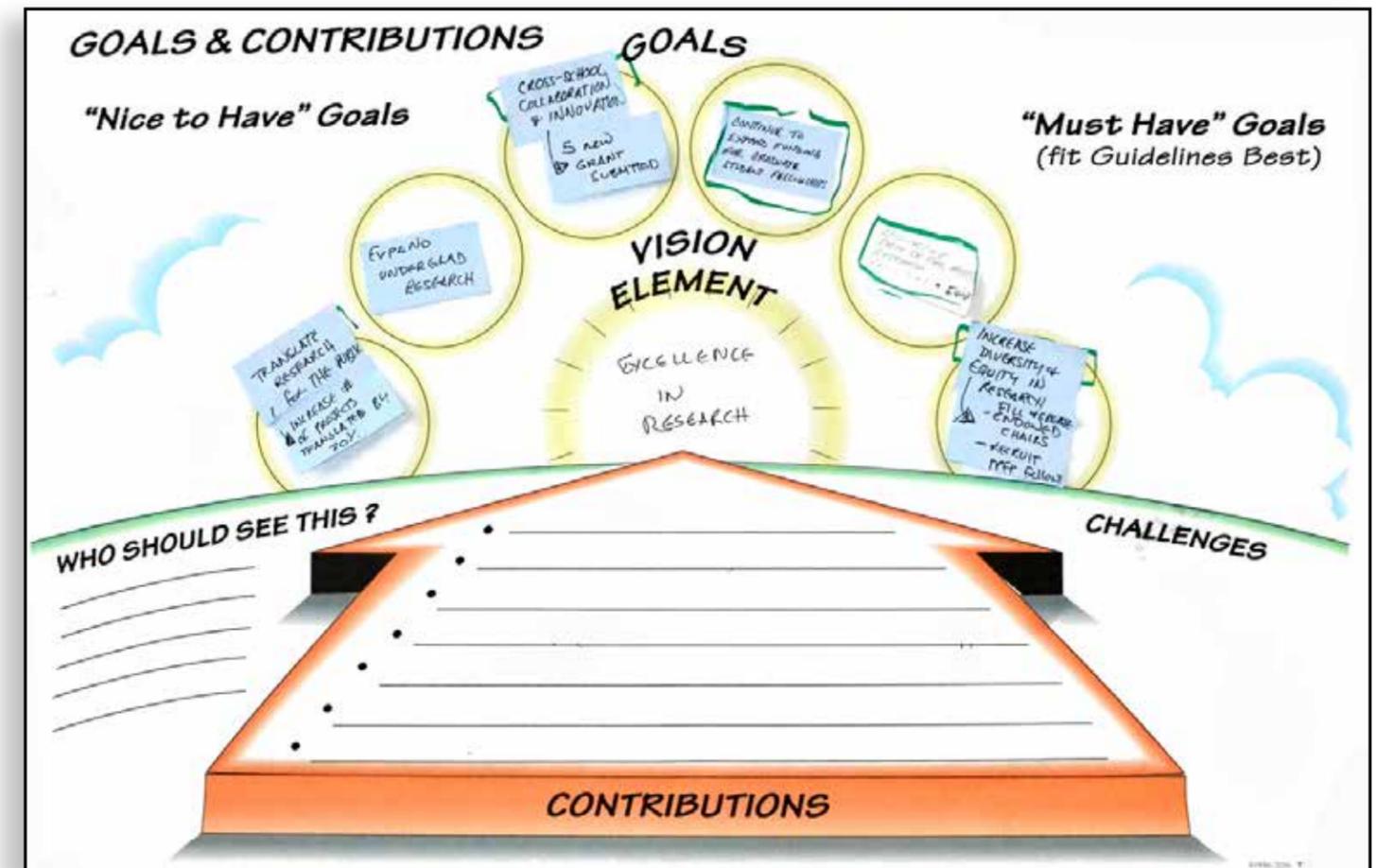
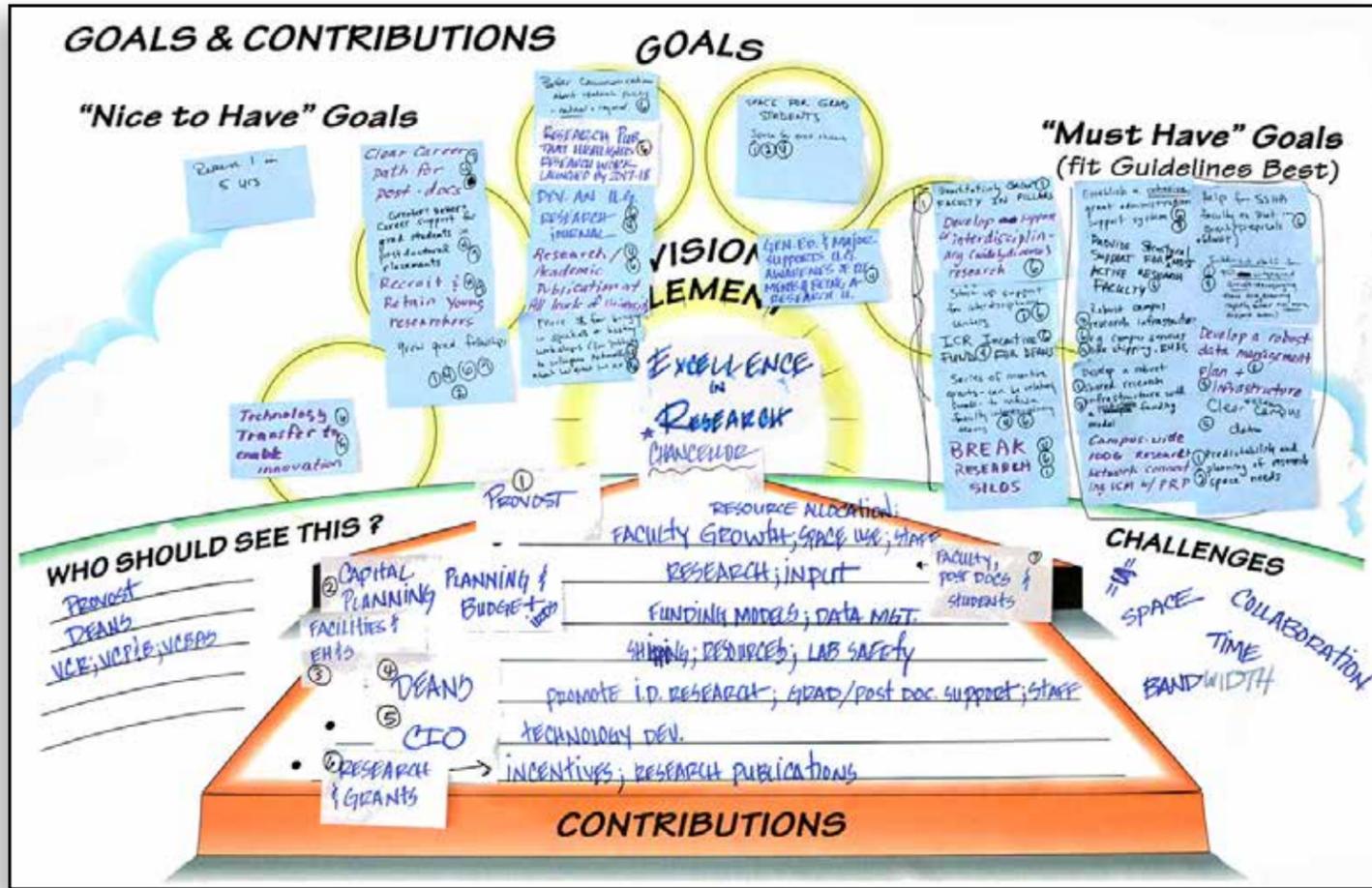
**COMMENTS: and LEARNINGS:**

- PRIORITY:** What processes can be eliminated?
- BAND WIDTH:** Address the problem of finding time to do more, already feeling over-loaded. Were engaged but not **EMPOWERED**.
- CAMPUS COMMUNICATION:** We communicated how we could do this together. Highlighted communication issues on campus.
- OWNERSHIP:** Who is responsible for all of these lists/goals? But we decided to own them!
- TIME:** "What will come of all this? Need time to practice all this..."
- OVERWHELM:** "it felt confusing, we didn't follow the directions..."
- Sustainable by Design:** Depts should evaluate by metrics report back every year.
- Other notes:** "A lot of synergy making GOALS actionable diminished the GOALS", "Enriching the Valley: Have a multi-disciplinary Committee focused on Community OUTREACH", "Make Services & Resources accessible to Community", "Dedicate & Prioritize staff hours regularly", "Challenge: Educating the Public about U.C. MERCED'S RESEARCH accomplishments", "Participation Innovation: This process is from the TOP down. How do I fit in? Start from bottom up!", "Rewarding faculty for innovative Pedagogy", "Provide research infrastructure Physical & Staff", "Contributions? We are dictating the others should be involved... but need to transmit more dialog..."

Here is some of the conversation shared at the town hall before lunch. Following are copies of the actual graphic templates filled out by the table groups.

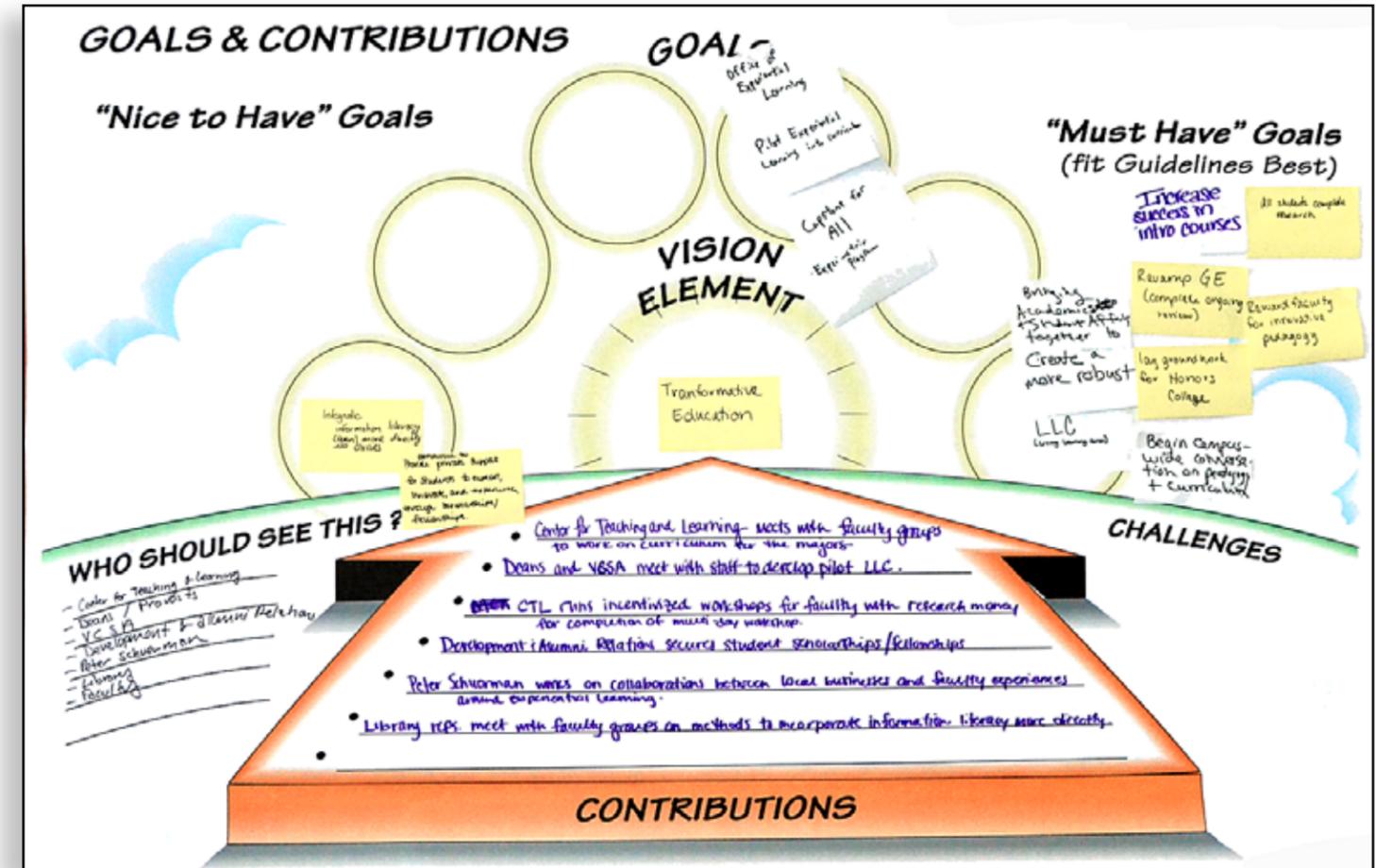
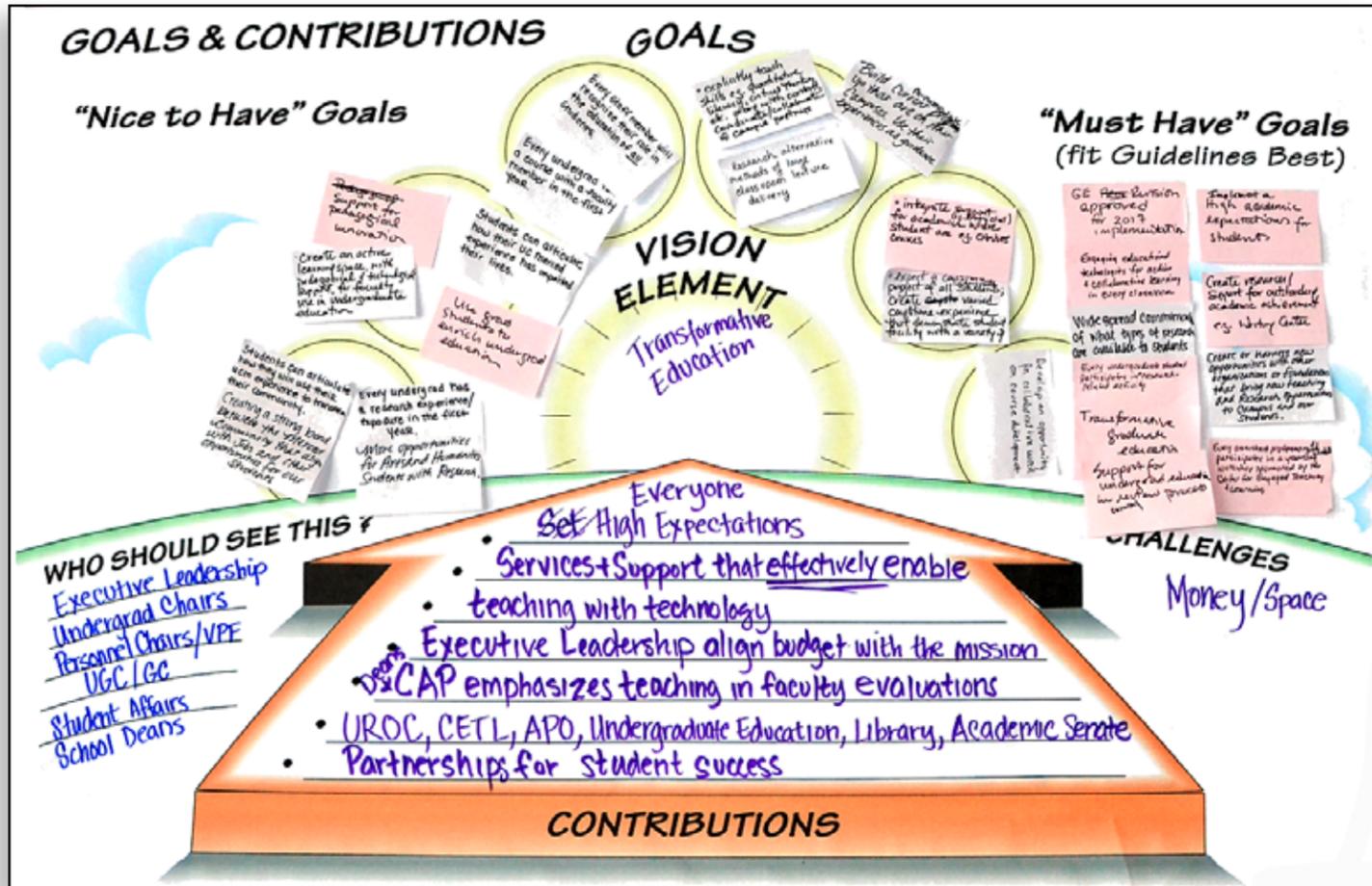


# EXCELLENCE IN RESEARCH GOALS & CONTRIBUTIONS



Charles Nies led off the comments from the perspective of the Excellence in Research Group. Each of the vision themes had one or two tables working on the themes. People chose the tables based on their interests. There are a large number of ideas here. This report will be made available to the different leaders, units, and schools indicated by the tables in the "WHO SHOULD SEE THIS" part of the template.

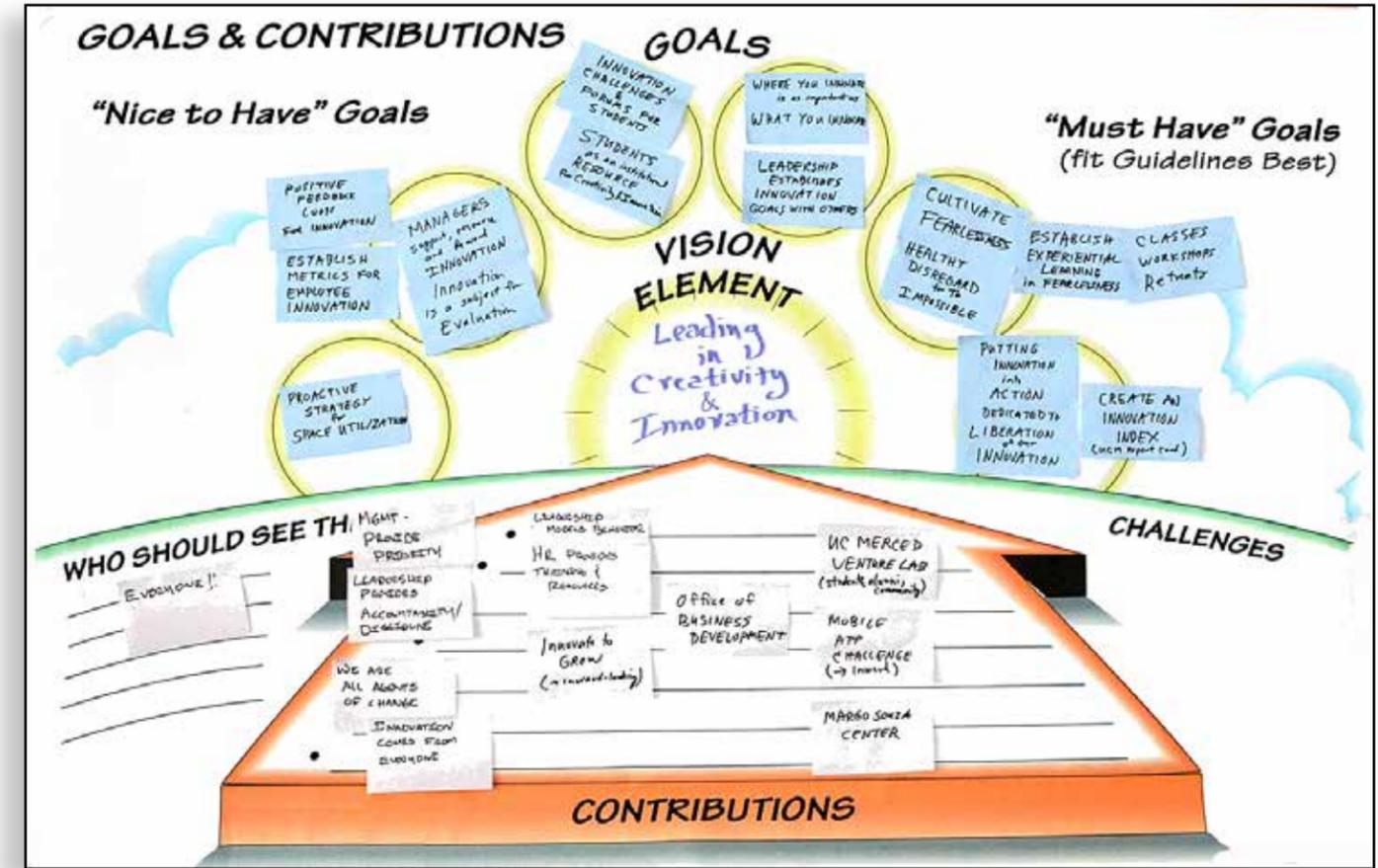
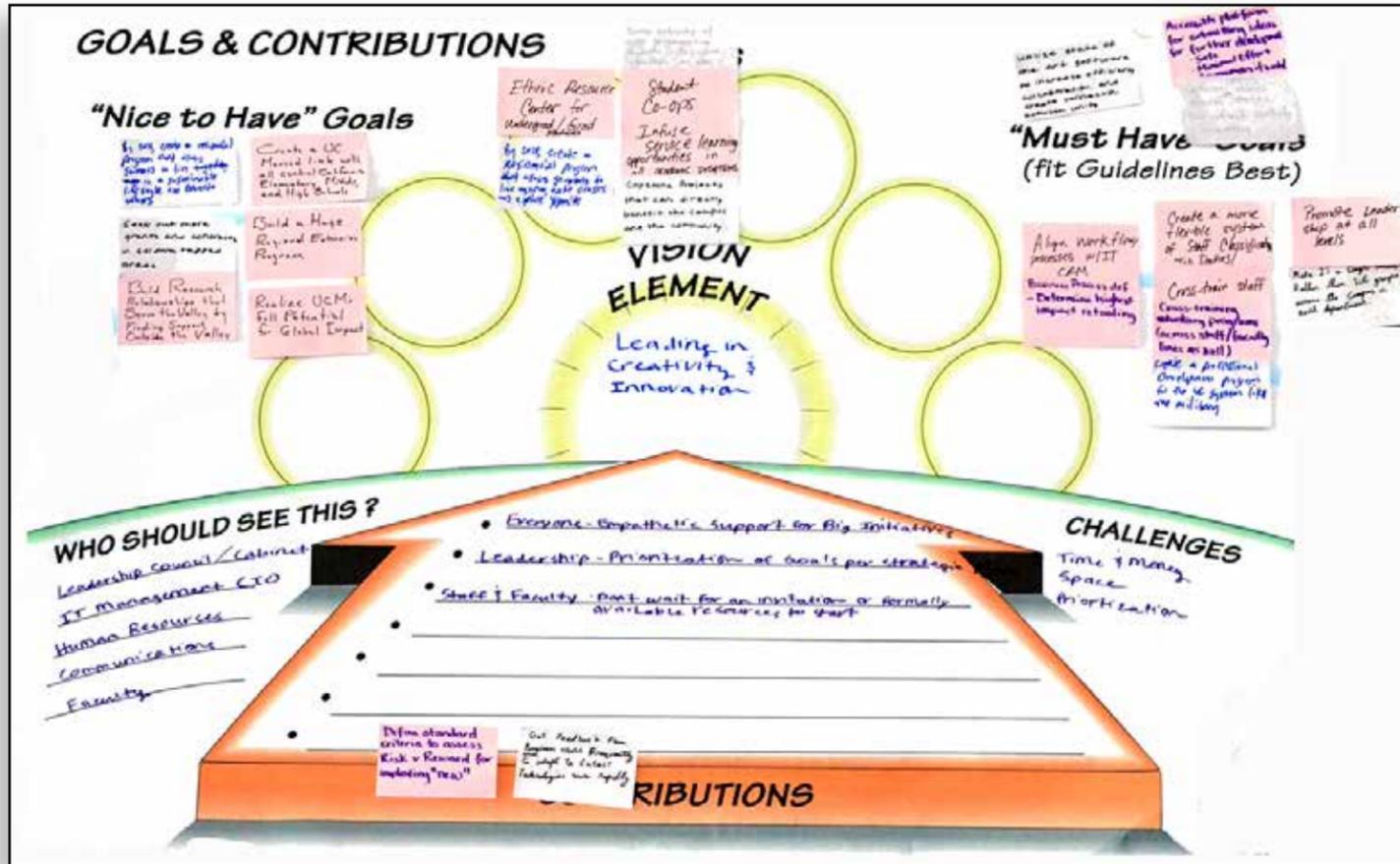
# TRANSFORMATIVE EDUCATION GOALS & CONTRIBUTIONS



The Transformative Education vision element was the new one added after faculty input. A General Education program review is already in the process. Both tables saw that this was approved and implemented. Both saw the importance of rewarding achievement and performance in some way.

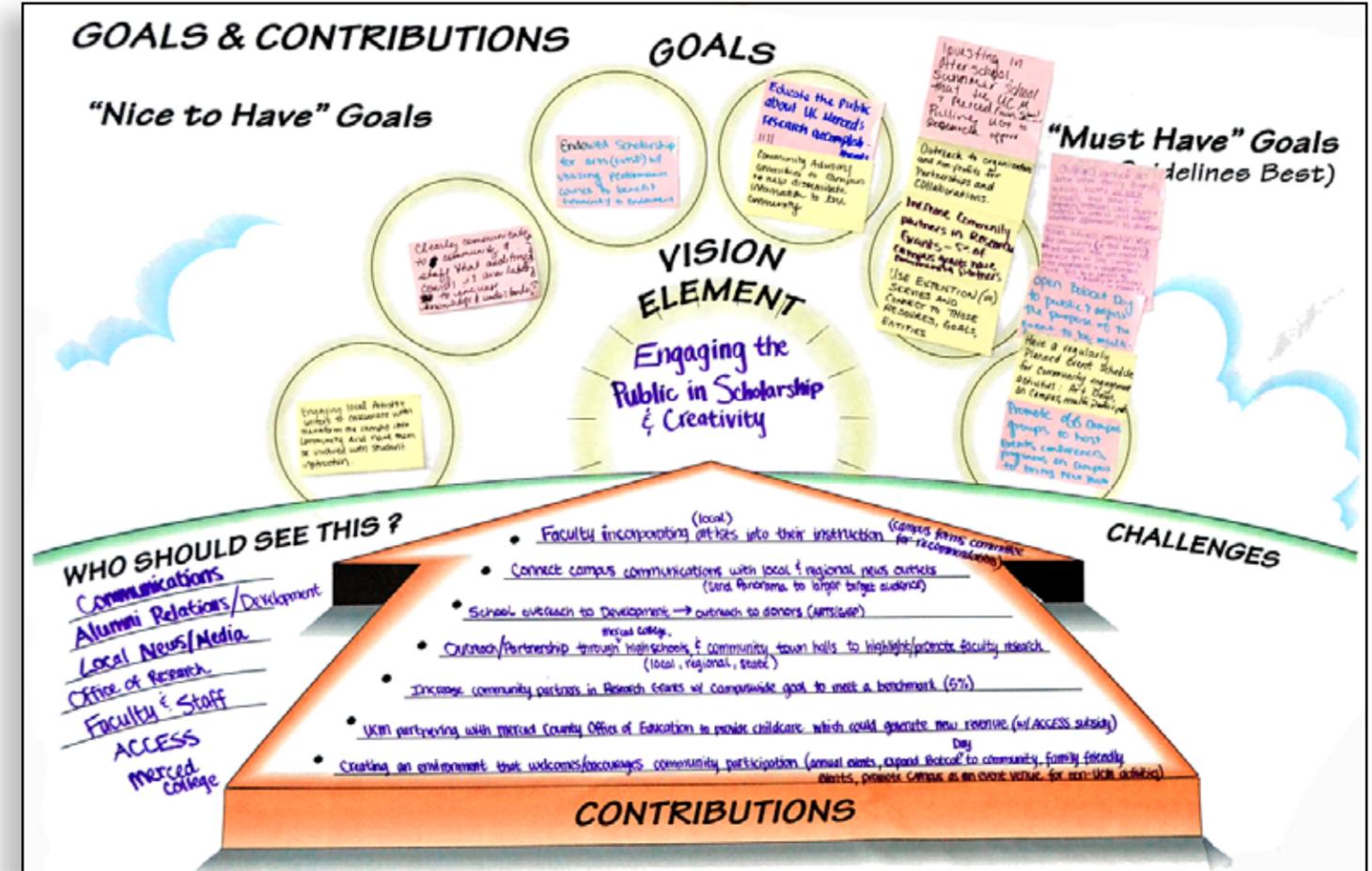
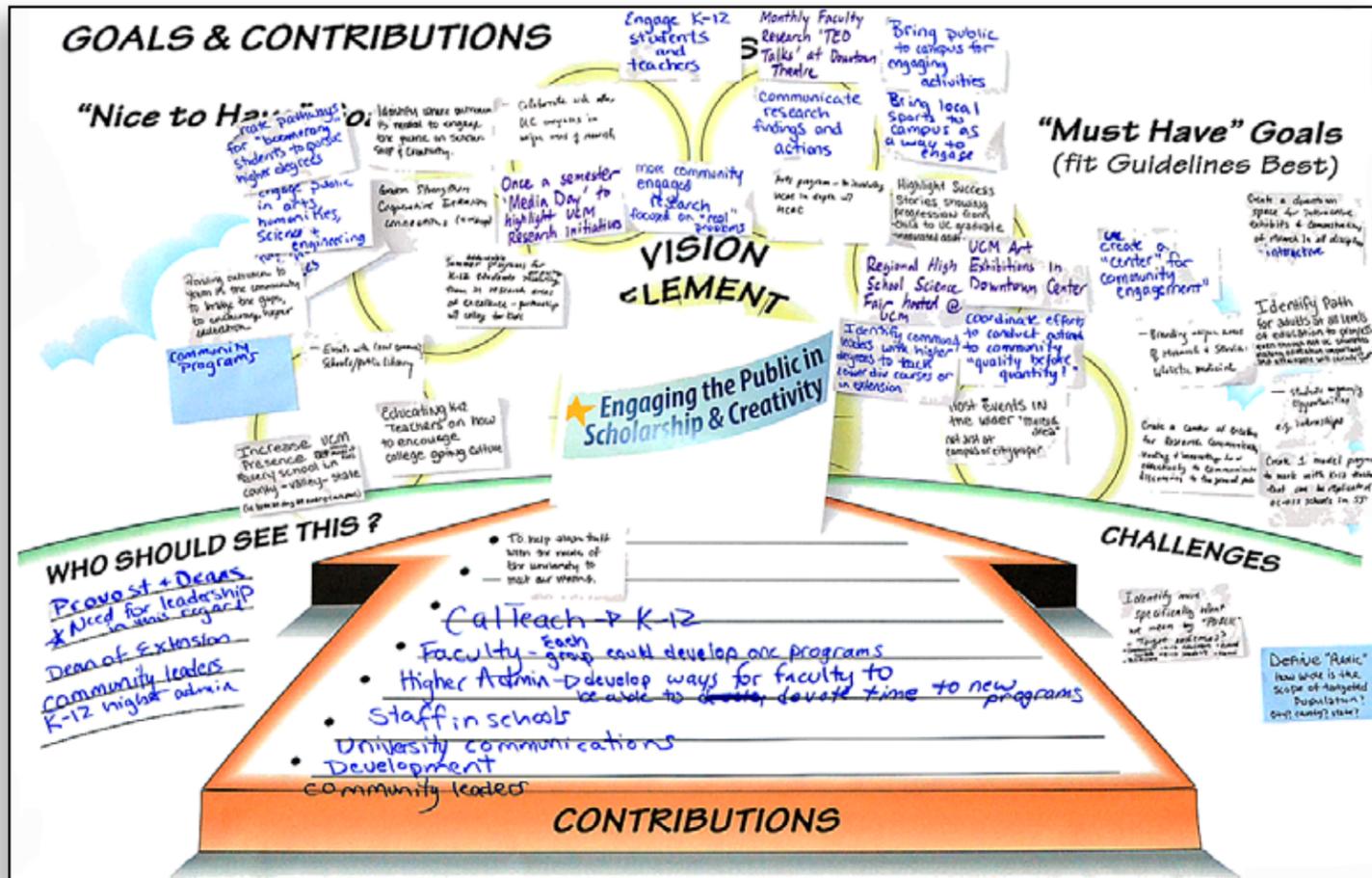


# LEADING IN CREATIVITY & INNOVATION GOALS & CONTRIBUTIONS



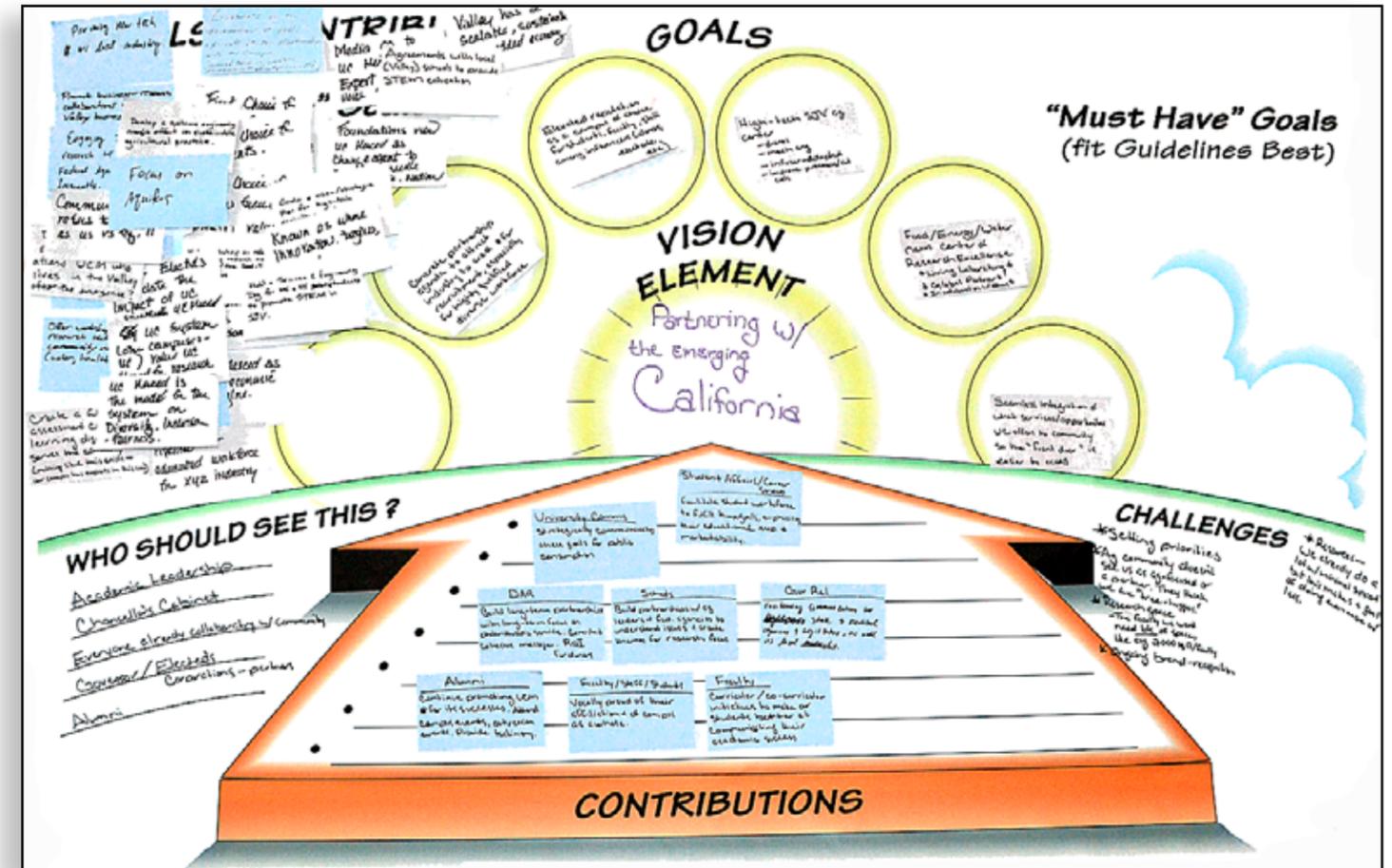
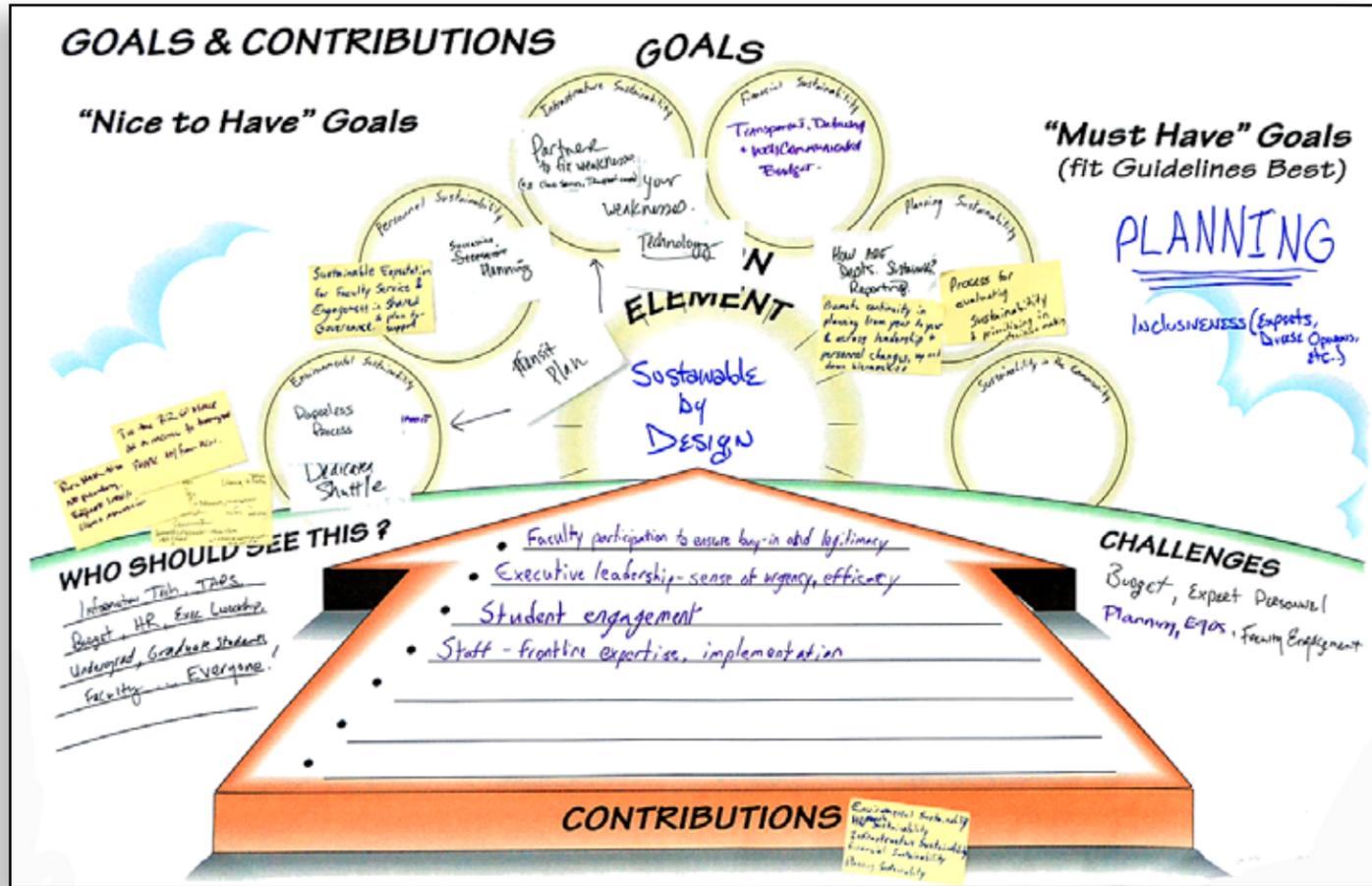
The tables focusing on Leading in Creativity and Innovation covered both student and administrative processes and activities. They imagined aligned workflow and CRM systems, managers who support innovation, pro action around space utilization, a culture of fearlessness and “healthy regard for the impossible.” Some imagined leadership being promoted at all levels, ethnic resource centers and student co-ops.

# ENGAGING THE PUBLIC GOALS & CONTRIBUTIONS



The vision element Engaging the Public in Scholarship & Creativity replaced Reclaiming the Spirit of Public Service, which people attending Summit I felt was a bit negative and carried a hint of superiority. This rewording stimulated ideas about educating the public about UC Merced, doing outreach, holding media days, establishing a Center for Community Engagement and maybe even a regional high school.

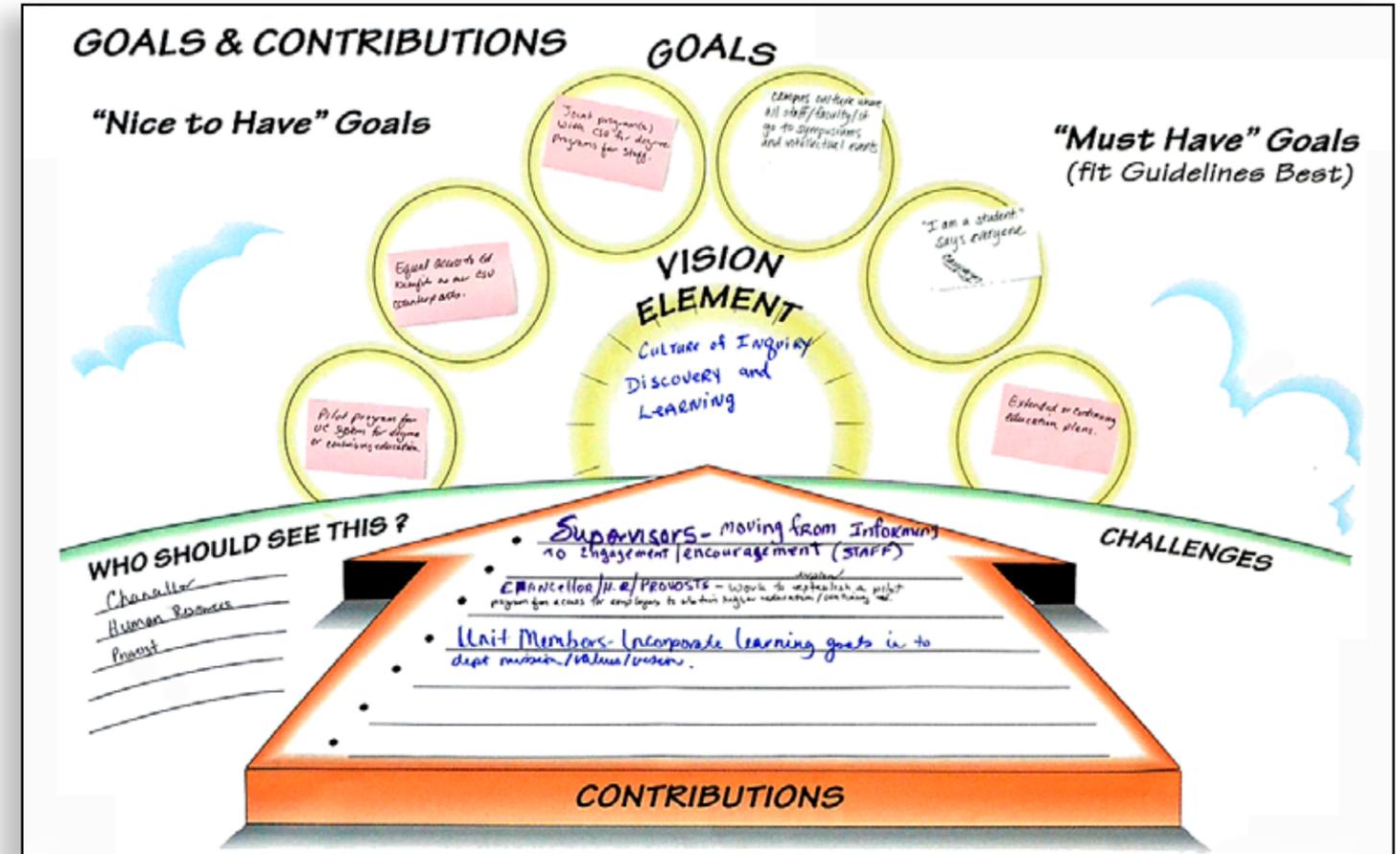
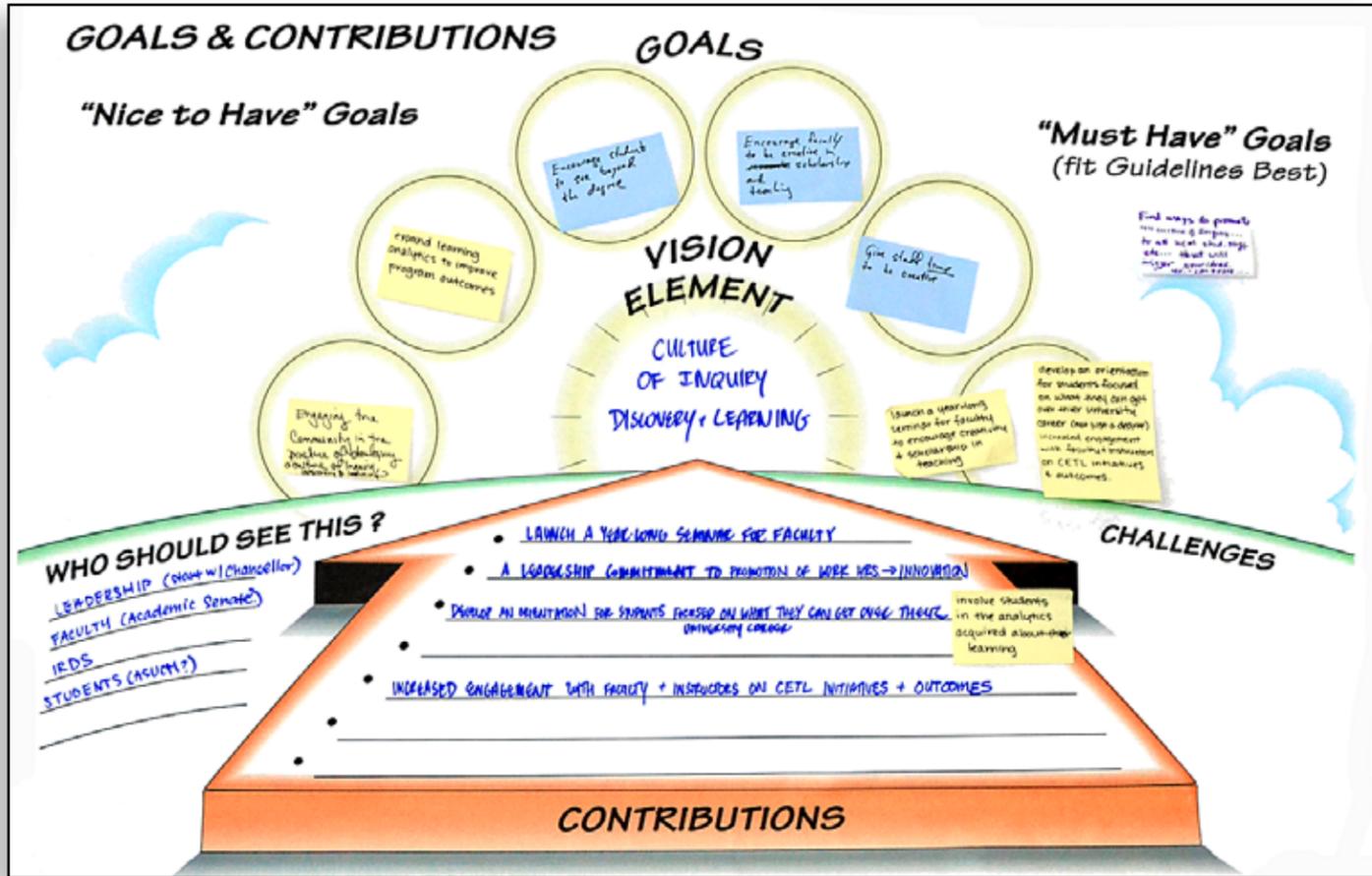
# SUSTAINABLE BY DESIGN and PARTNERING WITH AN EMERGING CALIFORNIA GOALS & CONTRIBUTIONS



Sustainable by Design and Partnering With the Emerging California only had one table each. The Sustainable groups focused on planning, in the areas of transit to the new Downtown Center that will be created, as well as establishing reporting structures for departments about how they are doing. They felt that intellectual inclusiveness was essential.

The Partnering table imagined explicitly partnering with industry, elevating the reputation of the campus, establishing a high-tech SJV, a food/energy/water news center and a seamless integration of services and opportunities about how UC Merced affects the community.

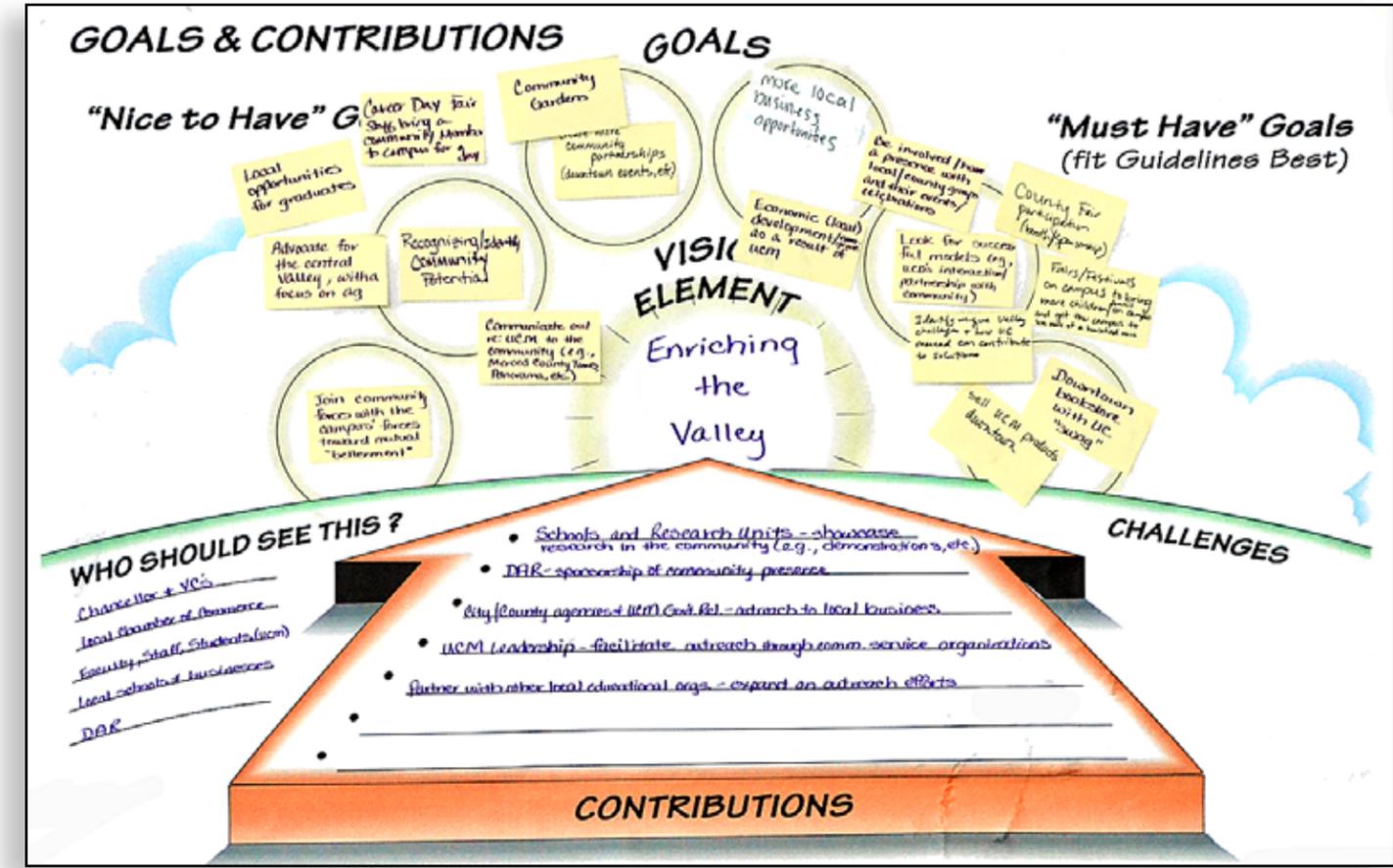
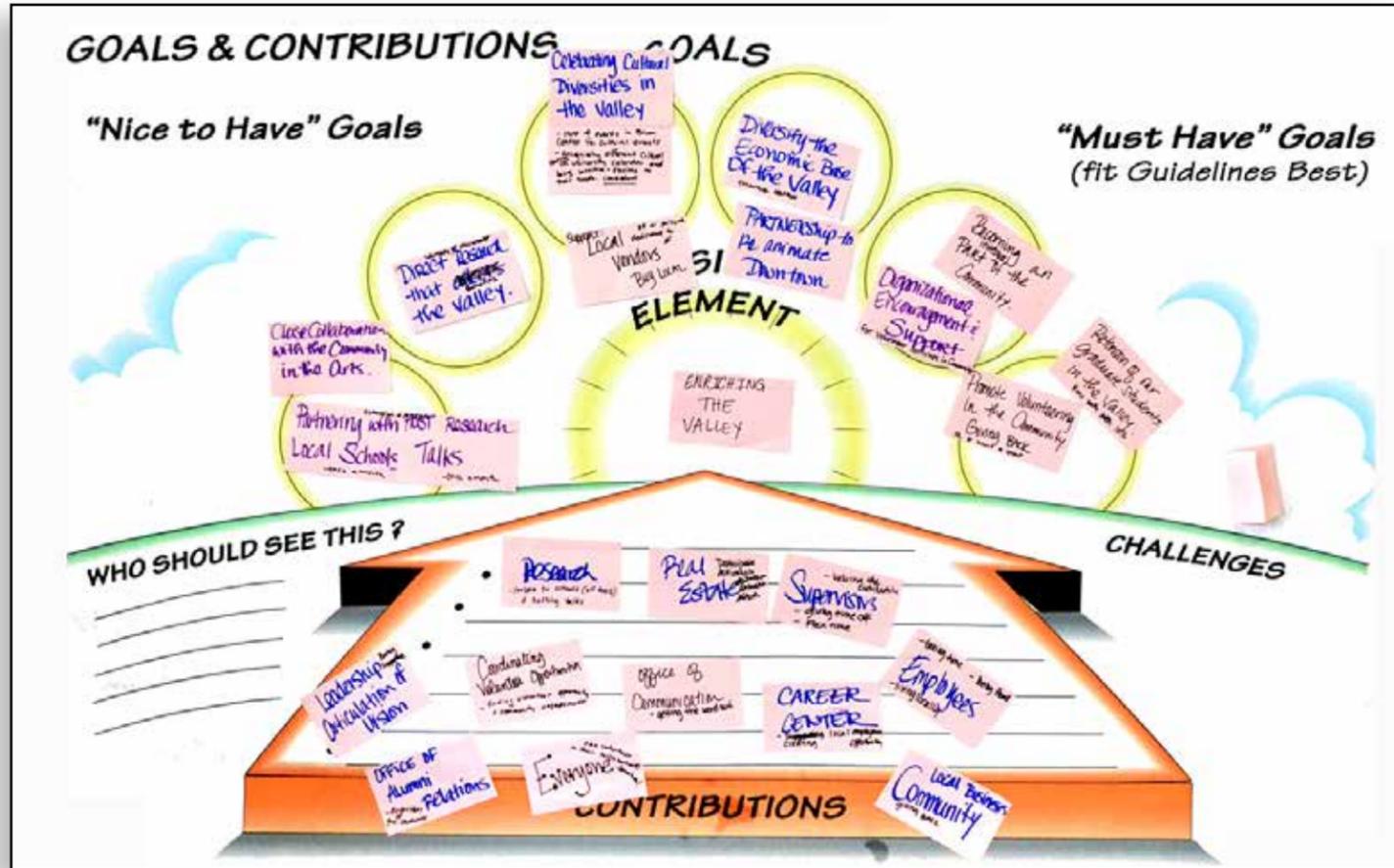
## CULTURE OF INQUIRY GOALS & CONTRIBUTIONS



Throughout the town hall Jason Martin, a member of the CAT and one of the key planners in the move to the Downtown Center represented participants who are on-line and adding comments. He is shown here reading one of the comments.

The two tables looking at goals for a Culture of Inquiry, Discovery and Learning, imagined expanding learning analytics, encouraging a post-degree point of view in students, encouraging creative faculty, and giving staff time to be effective. They also imagined systems for continuing education, equal access education, joint programs with CSU for staff, a campus culture where people go to symposia and events, and everyone thinks of themselves as students.

# ENRICHING THE VALLEY GOALS & CONTRIBUTIONS



These two tables had no problem imagining many ways to Enrich the Valley, through animation of downtown, to community gardens, mutual betterment projects, and directed research.

This town hall ended with several comments of gratitude at having the chance to participate in this way. These charts will be passed along to the units and schools doing planning next year.

The group then broke for box lunches.

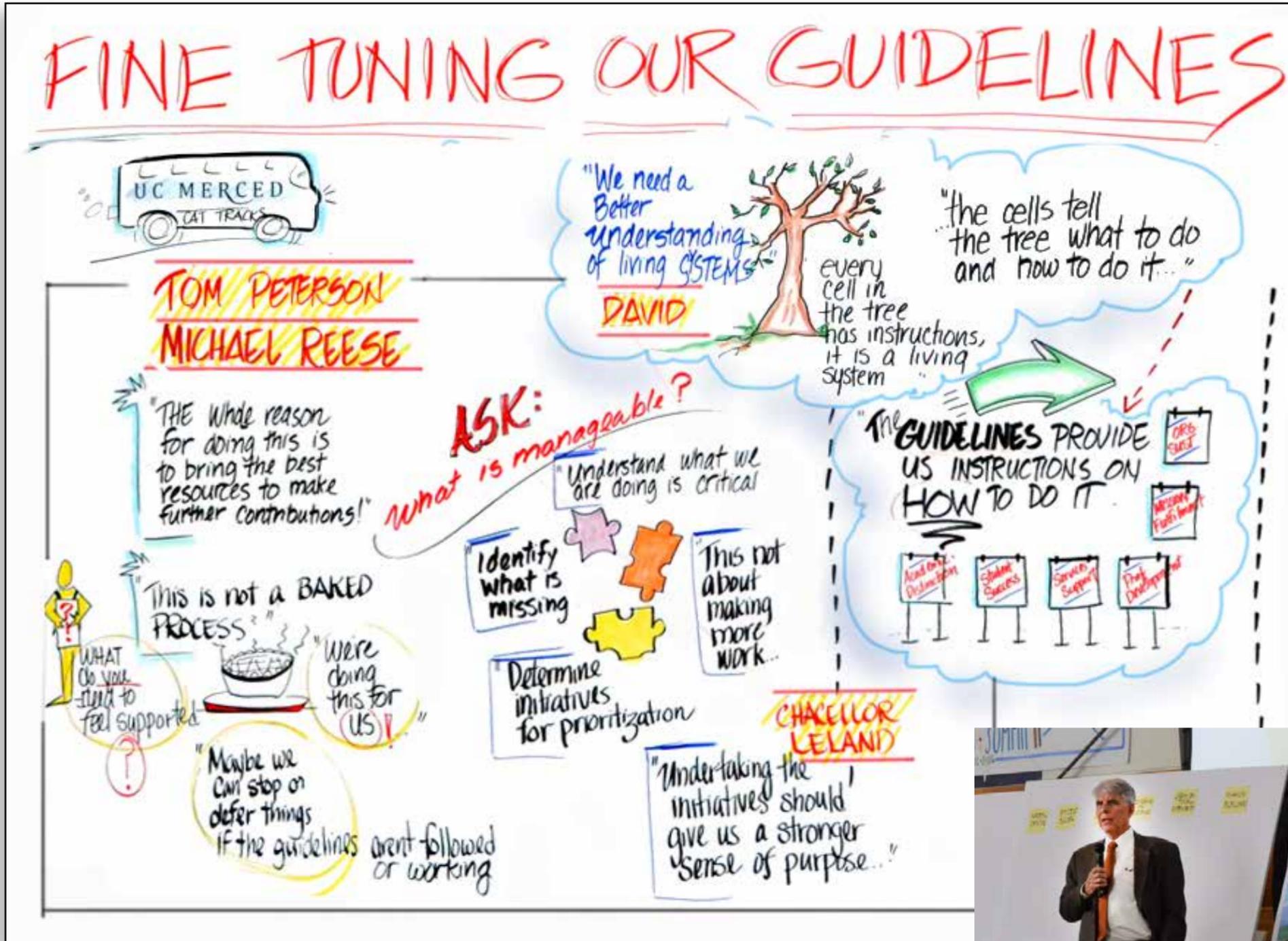


## AFTER LUNCH — WORKING ON GUIDELINES FOR PRIORITIZATION



Provost Tom Peterson kicked things off after lunch by focusing back on the nearer term and the challenge of implementing the vision. Chancellor Leland jumped in and reinforced the idea that taking on specific initiatives will give everyone a stronger sense of purpose.

# FINE TUNING OUR GUIDELINES



**UCMERCED UNIVERSITY OF CALIFORNIA DRAFT GUIDELINES FOR PRIORITIZATION**

The following guidelines emerged from the Change Alignment Team listening at the last Summit to what is important to take into account when prioritizing projects. The bullets provide some examples, but there are more indicators that we will identify this afternoon. Use this draft list to help think through which two-year goals would be most important for progress toward the vision element you chose to work on this morning.

Ask... **WILL IT IMPROVE...**

**ACADEMIC DISTINCTION?**

- Faculty retention and development
- Faculty recruitment
- Support for research grant and proposal applications

**STUDENT SUCCESS?**

- Graduation rates
- Retention/persistence
- Supports diverse, inclusive campus culture

**SERVICES AND SUPPORT?**

- IT modernization
- Faculty support services
- Quick response to problems

**PROFESSIONAL DEVELOPMENT?**

- Staff satisfaction
- Tools and training
- Alignment with UC Merced's priorities

**ORGANIZATIONAL SUSTAINABILITY?**

- Helps generate revenue sources
- Support tools for assessing and measuring success
- Efficient administrative processes

**MISSION FULFILLMENT?**

- Teaching
- Research
- Public service



The CAT identified some examples of each Guidelines in this worksheet developed for the Summit. Michael reviewed these as a springboard for more input.

Michael Reese next reviewed how the CAT listened to the last Summit and came to appreciate that a set of guidelines were emerging that could provide direction to prioritization. He asked for everyone to turn their attention to testing these and adding to their definition.

## EXPLORING GUIDELINES

A second Covision round invited tables to see if any guidelines were missing, and to provide input for each of the six. David oriented the on-line people to the correct link to provide their input. He compared the identification of guidelines as being like the cells in a plant that share DNA, which provides instruction about what to do in different contexts (like being underground, or up in the air). Shared, repeating processes are what give rise to complexity in the natural world. The guidelines would function like that if owned and understood by everyone.

UCMERCED UNIVERSITY OF CALIFORNIA, MERCED VISION & CHANGE ALIGNMENT SUMMIT-II

(Hidden) > Login > Home > 03 Understanding Guidelines for Action SETUP | WRITE | READ

Instructions: Discuss the following questions in your group and then enter your responses below.  
Please click "Submit" after each response

Are any guidelines missing? If so, suggest the guideline and its indicators.

Given the indicators already listed under each guideline, what others would you add?

**ACADEMIC DISTINCTION?**

- Faculty retention and development
- Faculty recruitment
- Support for research grant and proposal applications

**STUDENT SUCCESS?**

- Graduation rates
- Retention/persistence
- Supports diverse, inclusive campus culture

**SERVICES AND SUPPORT?**

- IT modernization
- Faculty support services
- Quick response to problems



# LEARNING

WHAT CAME UP IN GRPS?

- \* DIVERSITY ISSUES weaves throughout
- \* INCLUSION
- \* WHAT STUDENTS WILL DO AFTER GRADUATION...
- \* PROFESSIONAL DEVELOPMENT
- \* BENCHMARKS
- \* WE NEED TIME TO REFLECT ON ALL OF THIS
- \* COMMUNICATION thinking about how we will get the messages out
- \* WHO WILL HAVE ACCESS to this information, how to review it an way to do this in the system...



## CONVERSATIONS ABOUT GUIDELINES



Shown here are the different tables discussing the guidelines. Members of the Extended Cabinet and CAT spread out among the groups and participated in the dialogue.

## LEADERS REFLECT ON THEMES

UCMERCED UNIVERSITY OF CALIFORNIA, MERCED VISION & CHANGE ALIGNMENT SUMMIT-II

( Hidden ) > Login > Home > 03 Understanding Guidelines for Action - themes  
Flipchart: 03 Understanding Guidelines for Action - themes

SETUP  
Setup | Return | Edit

### UNDERSTANDING GUIDELINES FOR ACTION - Additional Indicators

Potential New Guidelines

- Community engagement
- Mandatory guidelines
- Stewardship: environmental, people, and money (triple bottom line)
- Campus diversity and inclusion

In Academic Distinction

- Faculty recognition and awards
- Recruitment of graduate students
- Unique program startups
- Innovative curriculum and pedagogy

In Student Success

- Post-graduation placement
- Collaboration between academic and student affairs
- Mentoring
- Research opportunities
- Professional development for students
- Academic support services
- Alumni engagement

In Services and Support

- Inter- and Intra-campus collaboration
- Improving systems, processes, efficiency, and workflows

In Professional Development

- Networking, inclusion across campus
- Staff professional development and support
- Succession planning

In Organizational Sustainability

- Fiscal responsibility
- Budget alignment and transparencies
- Branding UCM as a "good place to work"
- Setting and meeting performance benchmarks

In Mission Fulfillment

- (isn't clear what this indicator is; remove it?)



Cabinet members served as the theme team for this round, and identified the themes shown here, initially introduced by Jill Robbins (Dean of SSHA). Marjorie Zatz (Vice Provost and Dean for Graduate Education), Haiteng Li, (University Librarian) and Charles Nies (Vice Chancellor of Student Affairs) also reflected on the themes.



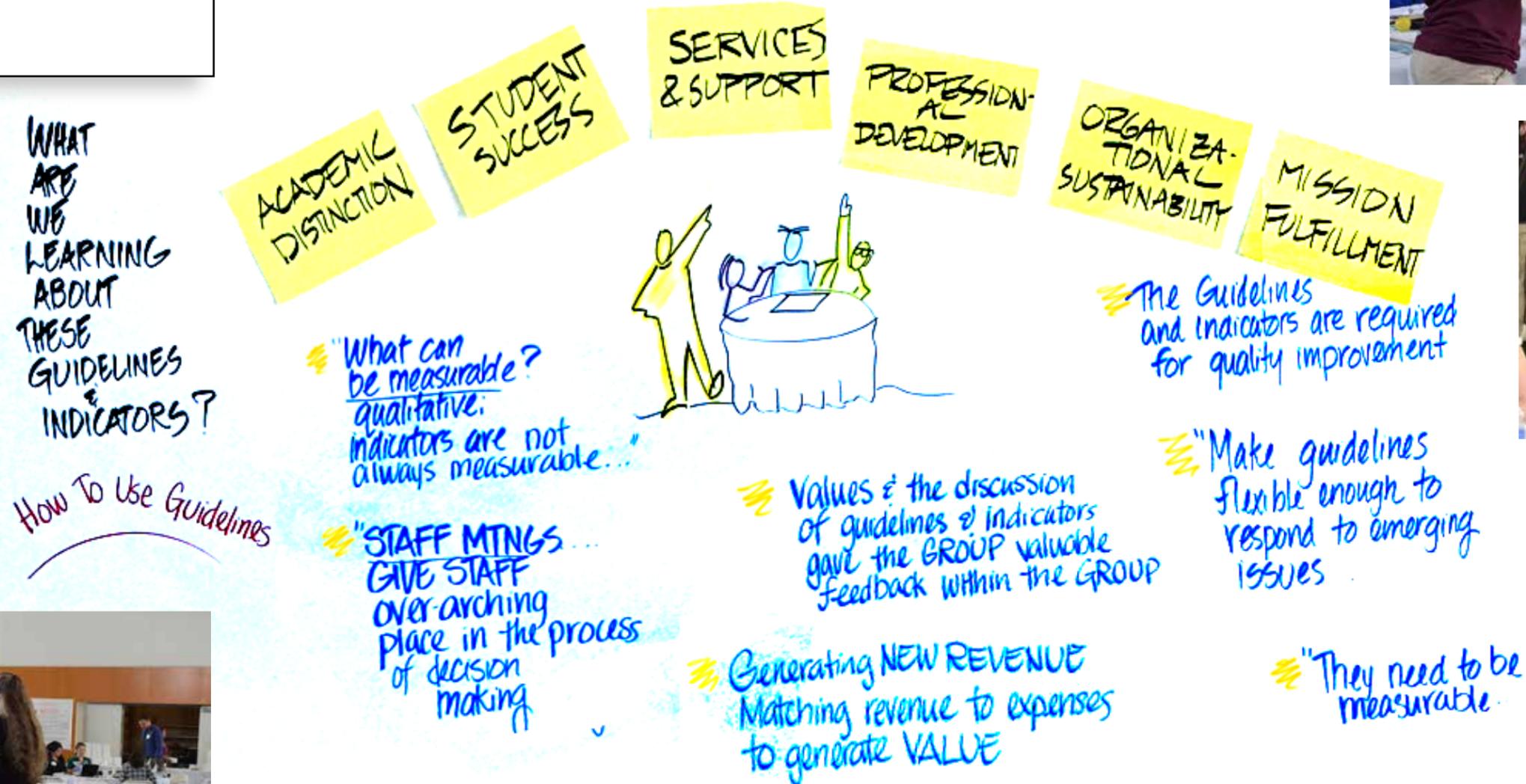
## TOWN HALL DIALOGUE ON IMPORTANCE OF GUIDELINES

### 3RD TOWN HALL QUESTION

*What are we learning about the guidelines and indicators as they are evolving and how they might be used?*



# DIALOGUE ON THE IMPORTANCE OF GUIDELINES



Gisela is shown her facilitating the conversation that followed from leadership's review of themes. Student staff served as microphone runners for people providing comments. All this material will be available on the UC Merced website dedicated to the Visioning and Change Alignment process.

## OWNING THE VISION — MAKING PERSONAL CONTRIBUTIONS



**OWNING THE VISION  
PERSONAL CONTRIBUTIONS**

**GREGG**

**VALUES**

**GUIDE-LINES**

**VISION**

When things sour in the workplace, we look for the BAD APPLE.

...NOT A BAD APPLE necessarily, but "THE WHOLE BARREL MIGHT BE BAD!"

"We follow scripts, sometimes unquestionably"

"Not empowered enough in an institution creates a bad barrel.."

"We want you to think of the bigger picture to prevent the bad barrel."

**THEME OF BEING ABLE TO CONTRIBUTE...**  
"Model the Vision is my best contribution.."

MY NAME  
MY CONTRIBUTION  
PERSONAL GOALS  
**ACTIONS I CAN TAKE**

Gregg Camfield provided a set-up for the final activity of the Summit, which was a time for everyone to identify a personal contribution that he or she could make to realizing the UC Merced vision. "There are always some sour apples in a workplace, and sometime a whole barrel can go bad when we fall victim to a limited script for ourselves. This is a chance to think of a bigger picture and a better script," he said.

# PERSONAL CONTRIBUTIONS

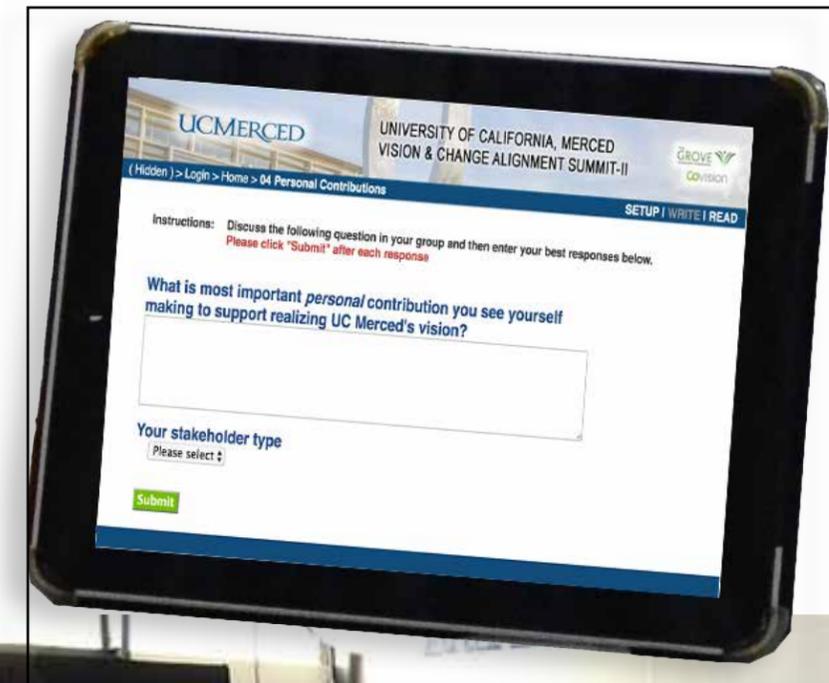
My, \_\_\_\_\_ CONTRIBUTION  
(Name)

My Personal Goals

Actions I Can Take

The graphic shows the UC Merced vision with the central theme "UC Merced Comes of Age". It is surrounded by various strategic pillars: Culture of Inquiry, Discovery & Learning; Sustainable by Design; Leading in Creativity & Innovation; Excellence in Research; Enriching the Valley; Partnering with the Emerging California; Engaging the Public in Scholarship & Creativity; and Transformative Education. At the bottom, it lists various departments (SNS, SSHA, SOE, MSMT, PLUS HEALTH) and campus locations (Merced, Fresno). Values listed include Sense of Community, Stewardship of our Mission, Caring, Diversity, Innovation & Entrepreneurship.

The participants in Gallo were able to work on personal worksheets like the one shown here. Both they and persons on-line then entered their ideas about personal contribution in the Covision system.



Here the different table groups are shown sharing what they would like each of his or her contribution to be going forward.

## PERSONAL CONTRIBUTION THEMES



UNIVERSITY OF CALIFORNIA, MERCED  
VISION & CHANGE ALIGNMENT SUMMIT-II

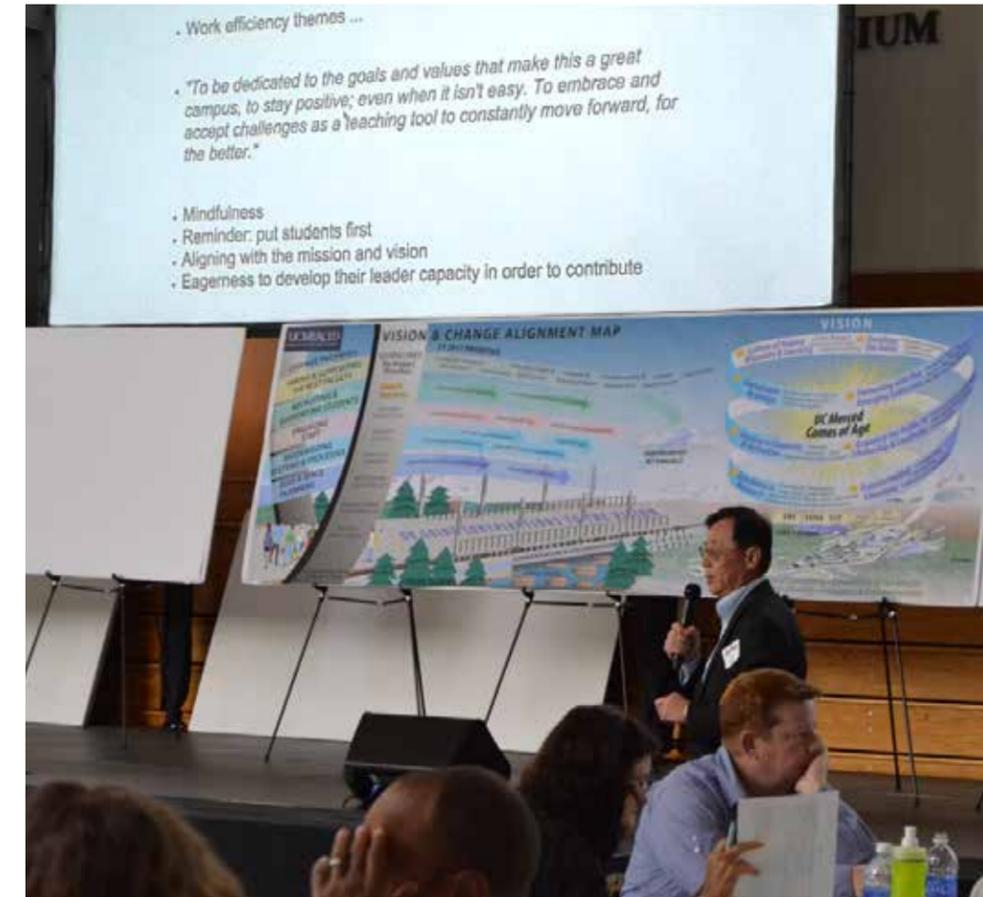


( Hidden ) > Login > Home > 04 Personal Contributions - themes
SETUP

Flipchart: 04 Personal Contributions - themes
Setup | Return | Edit

### HIGHLIGHTS & THEMES in "Personal Contributions"

- *"I think the most important personal contribution I can make to UCM's vision is to model and initiate and express respect and value toward each individual stakeholder I interact with."*
  
- Work efficiency themes ...
  
- *"To be dedicated to the goals and values that make this a great campus, to stay positive; even when it isn't easy. To embrace and accept challenges as a teaching tool to constantly move forward, for the better."*
  
- Mindfulness
- Reminder: put students first
- Aligning with the mission and vision
- Eagerness to develop their leader capacity in order to contribute
  
- *"Stop and slow down every once in awhile to celebrate accomplishments. This will help with staff morale, encourage others to step out of their comfort zone and encourage collaboration and communication."*
  
- *"Engage in the conversation, and trying to repress cynicism."*



Haiteng Li reviewed the themes emerging from the many shared ideas of how to contribute. He read some of the full comments in addition to reviewing this list.

PEDAGOGICAL & CURRICULAR INNOVATION

POST DOC & DISSERTATION FELLOWSHIPS

STAFF ENGAGEMENT

# MOVING INTO ACTION

## DR. ELIZABETH WHITT

WHAT WE HAVE BEEN DOING IN GENERAL EDUCATION TO TRANSFORMATIVE EDUCATION

BA degree hallmarks

- ① We are a small research university
- "Inquiry"
- ② GE. Curriculum that supports our student population.



"TRANSFORMATIVE EDUCATION from GENERAL EDUCATION through the Guidelines"

"GE. isn't just something that just happens in the classroom..."

- ▶ Student Success is recognized
- ▶ Implement supports for General Education

U.C. MERCED is "Research University supports, nurtures critical inquiry & collaboration." for a distinctive student population.

TEACHING NEW WAYS OF INSTRUCTION

## MARJORIE ZATZ

Pre Doctoral Fellowships

We wanted to grow the number

Shows recognition of the caliber of students ..

ACHIEVEMENT

How do we increase Student Population?

HOW TO WRITE A PROPOSAL - Put this together in library:

- FACULTY REVIEWERS
- PROFESSIONAL DEVELOPMENT FOR ACADEMIC DISTINCTION

WE PROVIDE WONDERFUL STORIES OF OUR STUDENTS & THEIR AWARD

BRIAN POWELL

STAFF ENGAGEMENT IS ESSENTIAL...

Campus will become a model in Alternative Work Systems

MERIT BASED PAY SYSTEM

PERFORMANCE MANAGEMENT

PUT TECHNOLOGY piece in place



As a finale to the day, several examples of how UC Merced is already moving toward its vision were reviewed. Elizabeth Whitt shared about progress being made in the General Education project leading toward Transformative Education. Marjorie Zatz reviewed the project to increase Post-doctoral and dissertation fellowships. Brian Powell, Assistant Vice Chancellor for HR talk about how merit based pay systems and performance management will help with staff engagement.

## TAKEAWAY COMMENTS



**CHANCELLOR  
LELAND**

My Priorities:  
Finalizing the MAP

I will ask what is mandatory & what goes on the shelf...

Articulate  
Change Initiatives  
with what you've  
provided today...

**Take Aways**

\* STAFF & LEADERSHIP  
DEMONSTRATES PASSION  
& HARD WORK...

\* Leadership &  
Leader development

\* Pride  
in investing  
in Stakeholders

\* Deep Engagement

\* "Decide your own distinctive  
Contributions  
in realizing this  
VISION..."

\* "We have a richer process  
and hopefully outcomes..."

\* a spirit to move us  
= FORWARD =

\* We've created a  
NEW WAY OF  
working together

\* We keep our Chancellor  
"Access,  
\* Commitment  
of leadership  
is extraordinary  
here..."

\* What can I do  
to advance the leadership

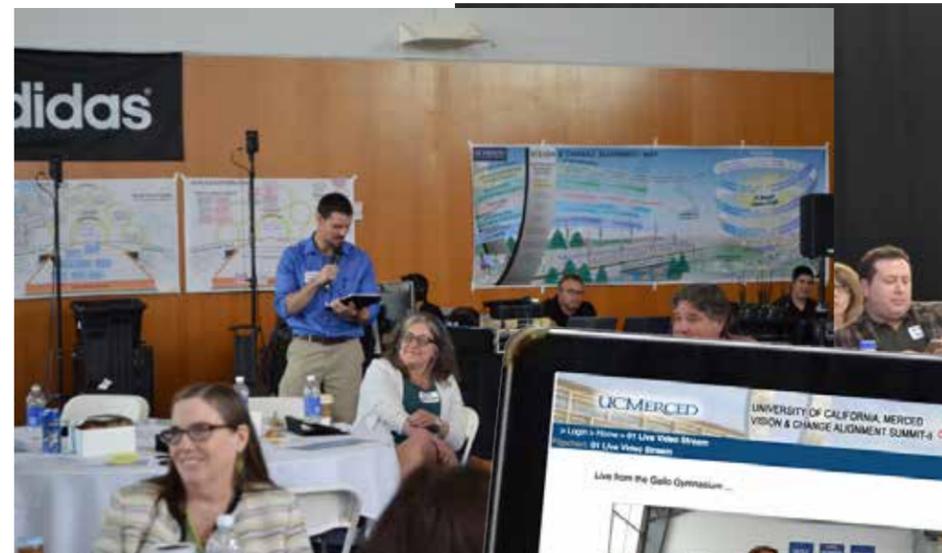
\* It's about the people  
to effect Change

\* I appreciate you  
Wish you the  
Very best...

\* Leadership is like  
SOFTWARE  
I love versions  
1, 2, 3

Chancellor Leland began the final sharing of takeaways with an appeal to embrace the need for discernment about what is mandatory and what can go on the shelf going forward. Her priorities are the finalization of this map framework and supporting the schools and units taking it further next year. Gisela then led a final sharing session while Kathy recorded key comments and takeaways here.

## TAKEAWAYS AND THANKS



UC Merced leadership expressed their appreciation and takeaways at the Summit came to an end. Marjorie, Charles, Elizabeth, Brian Powell, Erik, and Michael all shared final thanks and observations. Jason read some comments from on-line participants.

## NEXT STEPS



The CAT met after the Summit to review next steps. They would schedule a follow-up meeting apply the new guidelines to FY 2017 change projects and develop a more detailed map to those priorities. The Vision Map would also go through a final refinement stage and go to the Extended Cabinet for review and acceptance. The CAT will also expand its membership a bit to include more faculty, and work to help schools and units begin more focused goals setting in the fall, in concert with a new Chief of Staff being brought into the university.

For links to the Summit materials and videos click [bfsi.ucmerced.edu/2020-visioning-and-change-alignment](https://bfsi.ucmerced.edu/2020-visioning-and-change-alignment)