University of California, Merced
Campus Leadership Retreat
Board Room, Tri-College Center
Tuesday, July 21, 2009
8:00 a.m. – 4:30 p.m.

8:00 a.m. – 8:15 a.m.	Welcome and Overview of Retreat Goals – Continued Investment in Academic Core Programs and Implementation of Academic Vision *Sung Mo "Steve" Kang, Chancellor* *Keith E. Alley, Executive Vice Chancellor and Provost* *Charles Nies, Associate Vice Chancellor, Student Affairs*
8:15 a.m. to 9:00 a.m.	UC Merced Long Term Priorities – Moving from "Academic Vision" to Implementation *Keith E. Alley, Executive Vice Chancellor and Provost*
9:00 a.m. – 10:00 a.m.	UC Merced Budget and Enrollment Plan Overview: Operating, Capital and Auxiliaries Budgets and Long Range Enrollment Plan *Keith E. Alley, Executive Vice Chancellor and Provost* *Mary E. Miller, Vice Chancellor for Administration* *Kevin Browne, Assistant Vice Chancellor, Enrollment Management and Student Affairs*
10:00 a.m. to 12:00 noon	UC Merced Priorities for the Next Two Years and Associated Level of Growth – Process to Establish Campus Priorities – Strategic Approach to Prioritize and Correlate Research Focus to Areas Where Federal Funding is Concentrated *Keith E. Alley, Executive Vice Chancellor and Provost*

10:30 a.m. to 10:45 a.m.	*Break*
12:00 noon – 1:00 p.m.	Working Lunch – Discussions Continue – Impact on Morale - Communication to Campus Community *Mary E. Miller, Vice Chancellor, Administration* *Patti Waid Istas, Executive Director of Communications*
1:00 p.m. – 2:30 p.m.	Summary of Discussions and Strategic Action Items *Charles Nies, Associate Vice Chancellor, Student Affairs*
2:30 p.m. – 2:45 p.m.	Break
2:45 p.m. – 4:00 p.m.	Preparations for WASC Review – Next Steps – Capacity and Preparedness Review – How to Map Educational Effectiveness *Keith E. Alley, Executive Vice Chancellor and Provost* *Nancy Ochsner, Director, Institutional Planning and Analysis* *Robert Ochsner, Director, Center for Research on Teaching Excellence* *Laura Martin, Faculty Development and Assessment Coordinator*
4:00 p.m. – 4:30 p.m.	Reception
4:30 p.m.	Retreat Concludes

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Retreat Notes

Use "moment" to focus- Faculty & Staff around SAV

- Build morale and a way to contribute
- Engagement

- Provide inspiration

- Connect campus around educational enterprise/Mission of UCM

  - Showcase and recognize excellence
  - Reconnect – Know each other – Community
  - Teach-ins around current events using faculty expertise
  - Speaker series connected to educational mission
  - Use convocation period/lunchtime concerts
  - Create shuttle service to bring off-site faculty and staff to campus for events
  - Promote inquiry and intellectual activity as a natural part of campus life

- Streamline SAV and other plans to revitalize spirit/energy

- Tap into student energy and student successes as we tell our story

- Foster creativity and purposeful risk taking to "do" actions (i.e. Enterprise program/ school management)

- Attitude

  - Be responsible – deliver on plans
  - Learn hopefulness (self efficacy) vs. learned helplessness
  - Schools with clearer picture of reality
  - 2/5 years with filter for realignment
  - use FTE to understand and plan recruitment

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Retreat Notes Cont.

- Sell Quality
- Use SAV and current momentum as opportunity for research growth
- Balance disciplinary depth and competency with interdisciplinary research and complex problem solving goals.
- Use external review and expertise of other UC faculty to create "hard and critical examination" of current programs
- Create a program similar to Fireside Chats using web portal, podcast
  - Topics include OP updates, "did you know …" stories on student successes, solar farm
  - Allow faculty and staff to send in questions to generate future "podcasts"
- Streamline processes or transform process to reduce bureaucracy road blocks
  - Recognize that non-decision is a decision that creates frustration
  - Feels like bureaucracy for bureaucracy sake
- Encourage professional development during lean budge times as moral boaster
  - Define non-essential travel
  - Develop common expectations around what is expected around professional development
  - Tap into webinars

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Expectations/Outcomes

- Share information and update on SAV
  - Resources and tools available to move vision forward
- Develop initial steps to move vision over the next two years, keeping 2025 in mind
- Capture sentiment of faculty and staff around campus future
  - Workload expectations in light of budget situation
- Help develop a clear understanding of what excellence looks like, especially with less
  - What is the story we share
- Look at vision and future with mindfulness of UC system dynamics
- Connect vision and activity to culture of inquiry
- Develop plan to create comprehensive metrics around enrolment that considers funding, space, and faculty/staff
- Develop ideas to connect the university to the vision: everyone's role in the common good, the noble enterprise of the UC Merced
- Begin the practice of strengthening communication, streamlining work, and enhancing the feeling of community on campus.

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Action Items

Action Item	Committee	Started	Completed
Streamline SAV and communicate via formal and informal venues: overlay with school and other divisional strategic plans	*Keith Alley, Patti Istas and Gregg Camfield*		
Clearly communicate campus reality and plan for future, such as "fireside chat" pod casts on topics such as budget, WASC, retirement, health cares, enrollments, etc	*Steve Kang, Keith Alley, Mary Miller, Patti Istas and others as appropriate*		
Develop process to propose and select strategic initiatives/ select investments: research growth, star hires, or cluster hires	*Sam Traina, CAPRA and Deans*		
Plan for outside review to assist with realignment with select majors or programs, to focus on quality vs. quantity	*Keith Alley, Tom Harmon and Deans*		
Revisit school strategic plans within current reality and constraints, intentionally linked to campus plan – develop budget for schools	*Keith Alley, Michael Colvin, Evan Heit, Deans and School Leadership*		
Explore new instructional delivery models (ideas include change of calendar, expand summer session, share programs with Berkeley	*Maria Pallavicini, Chris Viney and Martha Conklin*		
Mesh enrollment projections with financial needs, space availability, and faculty/staff resources, for intentional growth	*Keith Alley, Jane Lawrence, Mary Miller, Kevin Browne, Kathy Jeffereds*		

Mattering and Marginality

Marginality

Cues	Feelings	Actions
Recognition	Validated	Take on more, continue the work
Get "Thank yous"	Humbled	Give feedback
Given independence	Proud	Stay emotionally involved
Given voice	Commitment	Try harder
Specific/positive feedback	Good	Take more risks
Verbal / written validation	Valued	Stay committed to organization
		Respond well

Mattering

Cues	Feelings	Actions
Excluded	Out of place	Avoid events
Disconnected	Hurt	Disconnect from work
Little / No financial reward	Angry	"To hell with 'em"
Silenced	Humiliated	Do job and "that's it"
Rubber stamp	Frustrated	Avoid / withdraw
Lack of acknowledgement	Resentful	Bend rules (negatively)
Shut-down	Ignored	Circumvent channels of communication
Operate on assumptions	Isolated	Get passive aggressive

Adapted from Nancy Schlossberg, *Marginality and mattering: Key issues in building community*, 1989