STRATEGIC PLANNING WORKSHOP  
GROUP SUMMARY/WRAP UP  
(transcribed from tape)  
OCTOBER 6, 2004

STUDENTS

Fred Edmondson: We talked about student preparation, in terms of working with and connecting with the high schools and the university, in terms of what’s going on with the students before coming to the university, in terms of what they are prepared for before they come here, and in terms of remediation. We talked about outreach to the community and outreach to the parents, in terms of getting them prepared, because a lot of times when you look at the population and the demographics that we are dealing with it’s going to be important to work with the parents as well. And, what we do to get a right mix of qualified students, to get a balance of students that are prepared for our university. A personal connection or quality of experience is important, so that once students do come to the campus we have a learning community that will engage the students and that will support the students through some of the things like we do now, such as First Year Experience, faculty-in-residence, student leadership programs, and so on.

Another is student-faculty relationships, in terms of student-faculty-ratios. We are growing, but how do we maintain the student-faculty relationship in a way that we can do some kind of quality experience with them. Student-to-student connections also are important. Students should have the opportunity to connect with each other in group settings and group learning communities.

Last, is intellectual engagement. This requires that we put together a strong infrastructure to make that happen—graduation, time-to-degree, student support, research opportunities for students, and developing strong learning communities throughout the campus.

Robert Fore (K-12): You are one of our main customers and yet we don’t have enough market analysis from our level to your level to say what it is you need—what is the product that you need in terms of student knowledge, skills, attitudes and values? I would like to propose that the university begin an outreach to high school teachers program, where the tremendous resource that your faculty is could become the rich content area and promote discussion. The College Board has done something where they’ve said, don’t’ bash high schools, tell us what skill sets the students need to have to be successful at your level and then how do we communicate that because our graduation standards…they may take AP courses, but they still may not get what the College Board calls the habits of mind that are necessary for optimal success at this level. So, I would encourage that and I would encourage more outreach to parents at the pre-freshmen level and even down to the middle-school level. Some of that is already occurring in your programs that are very successful, and we and you are working together on that, but it needs to be expanded. We are giving the PSAT next week to every one of our 9th, 10th, and 11th graders in the Merced Union High School District to shake up the system, to break middle school models that slot students into lower educational aims and to create higher aspiration levels for students themselves. Working with the College Board, we have something called the AP Potential program. Our counselors have been training, so they can ask for the PSAT’s and every student that can read above the 6th grade level is going to get this. They will meet with the students and say, look, based on hard numbers with the score you got on this, with the English or the math, you have a 60-, 70-, 80-, 90-percent chance of passing an AP test in that course and you ought to be in the AP course. We are trying to do that, to gear up, so we don’t send you students that need a lot of remediation. It’s a long process, but I think the more dialogue we open up the more it would benefit your level and us.
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FACULTY

April Hejka-Ekins: Well we looked at the strategic planning with three factors sort of identified. They were: student-faculty ratio, workload, projected retirements and replacements. We began with sort of a general discussion about the fact that if we take the growth mode, which appears to be the case, we also take a look at the fact that we are going to have a significant number of retirements, and that in terms of replacement there is probably going to be a lot of pressure to hire enough new faculty to keep up with the increasing size of the university. Faculty already feel a tremendous amount of pressure and so we kind look at it from the point of view of both dealing with the pressures that current faculty feel and also in the area of recruitment and our concerns about that. And, I think, one issue that came up is that we, as a university, try to be all things to all people in all ways. The one thing that suffers is the quality, because you can’t be all things to all people and still have high quality, and that’s always been a big issue here. So, the result of that in terms of faculty is the longer they are here the more burned out they get. So, we were thinking that one thing that needed some real consideration was being more creative and flexible about options regarding workload. That since we have to do teaching, publishing and service maybe we need to really rethink the fact that people could opt to do things in different ways.

Maybe people who wanted to teach could do teaching and diminish on the publishing end, or people who wanted to go out in the community and develop community programs would get more support for that, and that it would give faculty more options to bring their quality and their service and their teaching together. But now having to do everything eventually burns everybody out. So, having more flexibility around the workload options would really be worth further dialogue and development. Also, for the faculty that we are going to recruit we want to create the resources and the support, so that they feel they can still stay competitive in their field when they come here. Now that has a lot of nuances connected with that idea of staying competitive in terms of professional development, in terms of having the resources to keep up in their field. I think if we have a limited amount of money that we are willing to offer, we have to offer an atmosphere where people feel they have some flexibility with workload, and also will be able to develop themselves and stay marketable from a business point of view. That might even bring them here, if they thought they could do it. But, someone had said that there is sort of a fear, once you come here, you feel this ominous sense you might get stuck here and not be able to go anywhere else ever again because there is no support. So, we could probably hire more people if we did, in fact, think of it in terms of supporting the professions to stay competitive.

Then, for the faculty who are here, supporting faculty to remain academically focused. Because we have budget cuts, we spend an inordinate amount of time doing our own copying and all these other things because of the lack of staff positions that were cut. It forces us to do the essentials, but it’s not very productive academically. We kind of dwindle our time away to the point where you don’t have time to go to meetings, you don’t have time to be on committees, because you’re too busy trying to figure out how to get your copying done for the next class. There are no resources that are very helpful—they are very minimal. It’s very discouraging to people.

So, we brainstormed at the end a list, which we didn’t finish, of ideas for resources and support that would help empower faculty. Certainly, professional travel to stay competitive. Information Technology (IT) was hit really hard and when IT gets hit hard it hits the faculty tremendously because we rely on technology. We can hardly make it without it. Library—which I wrote twice—we need to support. The invisible library, that’s the easiest thing to cut, but it hurts us extremely much. Tutoring and advising—maybe to train people. We are talking about areas that faculty actually need development in, such as teaching, advising and tutoring. But the problem is you can have all those sessions over here
at the faculty development center, but it’s all off your back. You don’t have any time off for it. It’s just another thing you’ve got to fit in your schedule just like today, this whole morning—fit it in your schedule, teach class at night, read a thousand papers. So, if you expect faculty to be involved in that you have to have the support to have some time off to do it. Otherwise you just burn out. We need more clerical support and more lab support in terms of technicians. Equipment—Peter mentioned, in terms of equipment it would help a lot if you had a student….

Peter Nico: I was saying, in chemistry, we have a lot of these issues too. We worked very hard to get a lot of good equipment, but that equipment needs maintenance and we need someone to take care of it. We know how to write the grants and get the money for the equipment, but we don’t have time to go in and run them every day. We would be a lot more effective with the equipment we have if we had people to keep it running.

April Hejka-Ekins: So, when staff gets cut like they have taken the cuts it may not seem like faculty suffer. But faculty does suffer, because then we are doing all the things that staff were there to do. It takes the focus off our own academic work. We would particularly like people to address the workload thing, about options, because that could start a whole new way, a whole new paradigm for thinking about how we do things.

FACILITIES AND INFRASTRUCTURE

Steve Filling: We came up with three things, as instructed, we thought really impact the area of facilities infrastructure deeply. Number one is flexibility. Flexibility both in terms of size of classes, in terms of use of classrooms, in terms of how we can float space about, and in terms of timing.

The funding lag, that is, when we want to build things we have to think about it 15 years in advance. We have to turn all the paperwork ten years in advance and, if we are very, very, very lucky, ten years later we’ll get a building. The problem with that should be pretty obvious. Ten years ago we thought—I’ll pull something out of the air—we thought chemistry would be a big thing. It turns out that we were wrong—it’s nursing and CIS instead. The problem is we have a chemistry building. That’s a made-up story…

Which led us directly to the third point. What we think is most crucial to facilities and infrastructure is doing smart planning. That is, paying attention to the factors the rest of you have come up with. One of the things that came out very clearly was that it is important for us to understand our facilities and plan for them properly, but we really don’t want to fall into the trap we are in right now, which is trying to plan the rest of what you do based on this. We think that needs to be the other way around.

ADMINISTRATION, STAFFING AND ORGANIZATIONAL EXCELLENCE

Armin Schulz: We had at least three critical issues that emerged from all our brainstorming out there. As we looked back through, it came down to the idea that we are looking at internal priorities and we are also looking at organizational excellence.

Our first one is, there is a need to implement a communication model across the university, all the units, which builds a collegial environment and supports a community of learners, problem-solvers and collaborators. We felt, from looking around the room, that there was a lot of focus on effective communication -- effective communication -- effective communication.
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Second, there is a need for ongoing campus community development opportunities in order to very efficiently and successfully navigate the university infrastructure and its many resources and roles. It is felt that many times people are brought here at staff levels, faculty levels, etc., and they don’t know all the rules, or they don’t know the connections, or they haven’t been given an ongoing level of support. Therefore, sometimes time is wasted, mistakes are made, and we are not getting the most effective model in place. Also, embedded in there are the things of rewards and perks and so on. The third one we dealt with is our history and our niche. We said there is a need to articulate, record and celebrate our university identity and history, in order to advance our CSU niche and a plan for the future. So we need to identify who we are, what we are, and where we are going.

ACADEMIC PROGRAMS—GENERALIST VERSUS NICHE, GRADUATE AND UNDERGRADUATE MIX

James Klein: We identified three things. One you’ve already heard about and that’s facilities. We saw some opportunities, especially in the health-care professions where a lot of our opportunities for growth programs are in very specific kinds of labs, not just general classrooms. So, facilities were a big issue and the need to develop a plan for these specialized facilities. One opportunity would be to work with other partners, public and private, to share resources and facilities. The second one was faculty resources. We talked about trying to create some kind of a mapping for students to go from the public schools all the way to doctoral education right here in the Valley. With UC Merced, and in cooperation with all educational partners in that realm, we need to create a seamless transition between one educational institution to the other. Thus, growing some graduate programs that may also enhance faculty resources for our own population—that is, growing our own people that are comfortable with the Valley and who will come back after their doctoral education and work here.

We also identified some programmatic issues in the health sciences and in specific professional types of programs, such as teacher education and those kinds of things. And, we also realized that we don’t want to lose the connection to the Liberal Arts focus that the campus has as we begin to branch out into some other more professional areas and programs, both undergraduate and graduate.

We need to articulate the value and sharpen the focus, but also maybe even think of some general themes that we look at throughout the whole General Educational base experience. Through those, we talked about more sustainability—how you create a sustainable environment here in the Valley that balances agriculture, development, and all those kinds of issues, so when students do graduate from our institution they become aware citizens—when they go to the ballot box and when they are in conversations about development in the valley so that they understand how these issues may affect the sustainability of life here in the Valley. Another one of those was how the Valley relates to a more global economy; how our goods and services are part of our global network.

Finally, we can’t ignore the fact that we need to have a strong partnership with other educational providers, and also with our external community in helping us develop programs and talking about the need for some start-up funding before we can actually take some steps forward.
STRATEGIC PLANNING WORKSHOP-10/6/04 (continued)

ACADEMIC PROGRAMS—TURLOCK, STOCKTON, OFF CAMPUS

Cynthia Morgan: Our first one was strategic planning and management and local community needs assessment. We are talking about each of the off campus sites there—a vision and purpose for each of the sites, and an understanding of the communities served by each of those sites. So, looking at Stockton, Sonora, Merced, and so on, there may be local aspirations or local linguistics or cultural resources that we should address. And, long term planning and policy for on-line programming and for the satellite centers. There should be planning for each of the individual centers and that planning may differ for all those centers.

For resources—that was our second one—it was resident faculty hiring priorities. This is very critical dealing with the Stockton campus. Fundraising for endowed chairs at satellites and other needs. Technology support for on-line course development and general technology support. This would be for distance learning. As you increase distance-learning classes, obviously you have to figure out what the costs are associated with monitors. Reliable class scheduling—I emphasize reliable class scheduling. Long-term commitment to programs—I emphasize, again, long-term commitment to programs and staff support.

Our third one was partnerships. Particularly looking at partnerships with your local community colleges, with K through 12, with local enterprises and businesses, and that satellite programs will succeed if they are integrated and complete in course offerings and support over the long term. As you can see, the themes are running through here.

TECHNOLOGY

David Lindsay: I would like to preface my three strategic issues by talking about the fact that technology is increasingly central to the role of the university. Certainly, we realize in the area of instruction that everybody wants to teach in a smart classroom and that means technology. If we just look at the library and how it changed over the last few years—increased used of databases for journals and everything else, the delivery of music, the delivery of art images. Communications. When we say communications, now a day we typically mean e-mail, and e-mail means technology. We can still communicate face-to-face, that’s true, that is what Randy is doing to us today, but often when we communicate face-to-face it uses power point, as Randy did this morning.

Lastly, with respect to information, not just information access for our research and for our teaching, but just for running the university, we think in terms of PeopleSoft and Brio, etc. This is technology.

Now to our three strategic issues. The first is the cost of technology. What we often don’t realize is that hardware is the smallest cost related to IT. People costs are the greatest cost. The total cost of ownership of a desktop for one year is $10,000. We have 1,500 desktops on this campus, which is $15 million per year. This brings us to our scenarios, which are no growth, moderate growth, and the high growth. What we realize is the situation is just going to be exacerbated. There will just be a higher cost the more growth that we have.

The second area is the impact of technology. We can’t always predict what the impact will be. I think ten years ago, when we saw computers coming on campus and heard about the Internet and so forth, we tried to make projections and predictions and probably 50% of them were wrong. But, technology will definitely cause change and it will also allow us to adapt to change. We don’t have control over all of
that change. Some of these changes are coming from external environments. We have to respond to unfunded system mandates with respect to technology, we have to respond to Federal and state laws and typically we are given little or no state funding to respond to those laws. So, once again, technology, while it does give a powerful tool it does cost money.

The third strategic issue is the challenge of retaining trained IT staff. Right now it doesn’t seem to be a big problem. Ever since the dot com bubble burst, there have been more people to hire for these functions. But, if one looks very shortly into the future, you see it will increasingly become a problem. Because of the central role of IT to everything we do in the university, that’s a future problem we should be very aware of and should start addressing now. Another one was to look at how our area related to some other areas and, of course, IT relates to everything. But, specifically just focusing in on one of the facilities area, there was a suggestion in our group, since one of the issues is lack of classroom space, perhaps we could use IT to come up with some more radical models for program delivery. One suggestion was a three-unit class might meet two units and the third unit might be delivered on-line, via whiteboard on the blackboard system.

Tom Carter: I’ll bang my drum again—one thing we need to recognize is that there has been a game played on the CSU system where they talk about full funding of growth, but what they are secretly meaning is full funding of the marginal rate, which is not the full cost of education. If you look carefully across the CSU, there isn’t any economy of scale. If you look at the total budget of San Diego State, divide that by their FTES and then look at the total budget of Stanislaus and divide that by our total FTES, those numbers are just about the same. But we are funded for growth at a marginal rate, so it is not funded at the actual cost of our provided education for the students. So in effect every time we grow we are diluting our base dollars per student, our net dollars per student increases each time we grow because the dollars don’t match. Now we just had a new Compact that in essence enshrines and guarantees that situation will continue. So that’s an issue. One of the reasons that the past few years of budget cuts were so drastic on our campus was that we had gotten ourselves into the mode of counting on next year’s dollars influx to help us cover the shortage of this year. But with growth, our next year’s shortage is going to be even more, so we are actually getting behind. So, in the past few year’s we’ve worked really hard to renormalize all that to get ourselves, in essence to catch up with the loss, net loss that we’ve had. So, we cut more than what our net cut would have been because, in effect, we are catching up on our cuts that have accumulated over the years. Now, over the next five years, it doesn’t look like things are going to be rosy and we need to keep those issues seriously in mind as we start thinking about growth scenarios and not get trapped in that notion of, well we need some new dollars, yet the new dollars come at a net cost. We’ll be in the same situation again five years from now, where we are, in fact, in deficit…

Randy Harris: That is one of the reasons I introduced the no growth scenario. But, the problem is if we don’t grow, and everybody else does, and in the negotiations...well there is an issue there politically. I don’t know the answer to that, but it is a problem.

EXTERNAL COMMUNITY

David Dauwalder: We began with talking about the dozen different constituencies that we connect with externally through the institution. We also talked about the functions of external relations in terms of what do we do, what is it for, and then the concept of who develops that relationship. We concluded that everybody at the institution really develops those relationships in a variety of ways.
So, when we got down to the key issues, the first one was connecting with each external constituency but through a purposeful plan. Seemed like we just seem to have connections with all of these constituencies, but it’s almost random, it almost just occurs. That is not entirely true, because some are very planned, but yet I think we need to take a much more careful look at how we develop these external constituencies.

Secondly, out of the conversation it became clear that we really need to consider working with K-12 to a much greater extent to develop the future diverse college-going population. Increasing visibility with K-12 students. In other words, nurturing early on and working with K-12 to work with their students early on to get them mentally prepared and emotionally prepared for the concept of going to college.

Thirdly, continue to pay attention to developing the university as a community resource. That is related not only to the facilities of the university but also the people of the university and taking a look at how we can serve as a resource to our external community.

**ASSESSMENT AND WASC**

Carl Bengston: In our discussions, one thing we agreed on right away was that the teaching issues pertaining to assessment and WASC accreditation are really pretty much independent of the three scenarios. Whether it’s no growth, little growth, or a lot of growth, the issues around assessment and WASC are pretty much the same. We distilled from our discussions what we considered to be the three most strategic or critical issues related to assessment.

The first has to do with defining, getting some buy-in, and then providing the tools that folks need to actually do assessment. So, we want to clarify the purpose, identify the benefits, and develop training. That is a process that we believe involves all of the different constituent groups on campus—students, faculty, staff, administration, our external communities.

The second issue we identified was the need to align our assessment activities with decision-making, strategic planning processes on campus, and budgeting. That means we need to support program quality and improvement.

The third issue we identified—we did some word-smithing on and probably not quite there, but are on the right track here—we want to develop a culture of evidence that will enable us to reach the highest level of quality and want to be able to define that internally—what does this campus community believe is our highest level of quality. And, we want to be able to validate that finding, whether it be through WASC reaccreditation or departmental accreditation or whatever accreditation is out there and accessible to us. We want to be able to validate to the external group that we have reached that highest level.

**WRAP UP**

June Boffman: We will pull all this information together. This material will be disseminated to our campus community and I would love some ideas on how best you think we should disseminate some of this. We have yet to get feedback from other people and, then, we will pull this information together as our plan. And then that plan will go back to our campus community for feedback, before we get it really fine-tuned and hopefully gain acceptance this year for our five-year plan.
Stacey Morgan-Foster: I would like to see it all collected and get some sense of what themes are emerging, because there is overlap and I think we can probably combine some of those themes, and we will have fewer, and that will make it real easy to get feedback on them.

Juan Flores: I think it is going to be very hard for our notes to capture the richness of the discussion that took place in our small groups. I wonder how we can try to be sure that whatever is copied down reflects our discussions?

June Boffman: I would like it if somebody in your group would like to summarize your main points, because we are going to be typing from the materials, so if anybody in the group wants to put some main ideas, just quick type them and provide them to us, I think it would be a nice complement to what we are going to be working with. There were so many good ideas, and then we wanted to narrow them down, and we were afraid we were going to lose some.