

The Seventh Pan Commonwealth Forum
Open Learning for Development: Towards Empowerment and Transformation

Submission of Paper for Presentation
Forum Theme: Institutional Development

By
Author:

Dr. Jeanette M. Bartley-Bryan
jmbartley@utech.edu.jm

Associate Vice President, Open & Distance Learning,
University of Technology, Jamaica.
<http://www.utech.edu.jm>

Presentation Title
Leading Organizational Change for Distance Learning
at the University of Technology, Jamaica

August 8, 2013

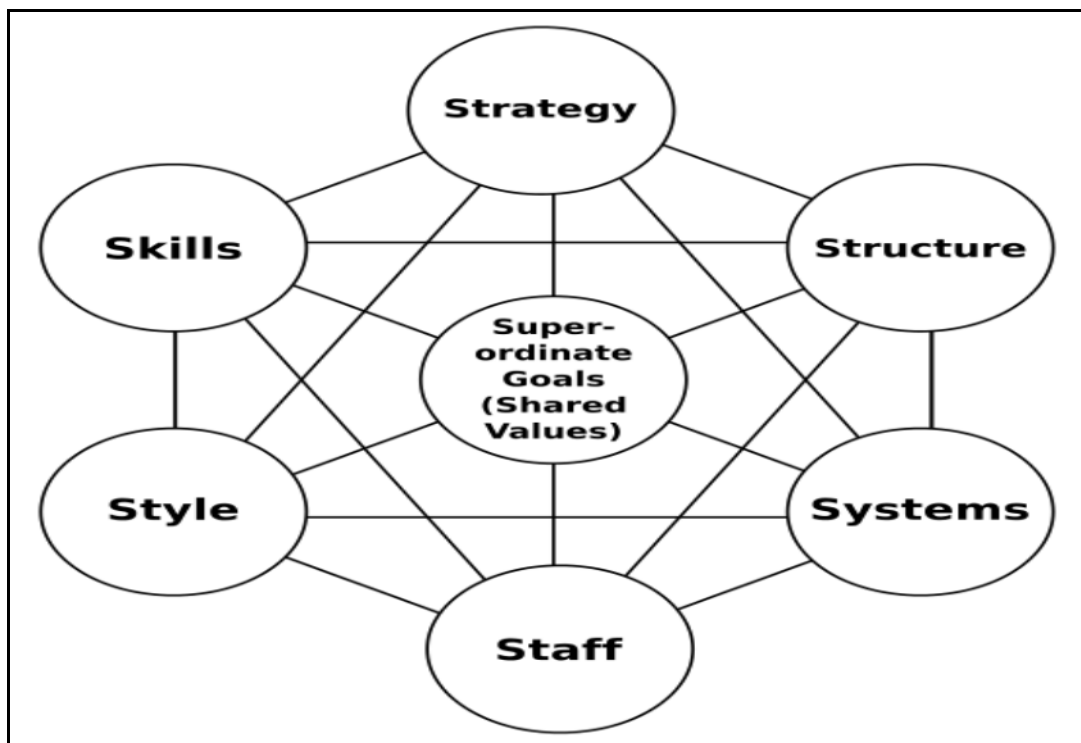
INTRODUCTION

Over the past decade, there has been increasing urgency for the University of Technology, Jamaica (UTech) as the leading polytechnic institution in the English-speaking Caribbean, to respond to the growing regional demand for flexible access to many of its advanced, professional academic-technical programmes and services, beyond the physical boundaries of its original urban campus. This demand reflects an imperative from diverse target groups for an approach to higher education, which provides for flexible and multiple options in relation to venue, pace of learning, programme costing, scheduling and learning design formats via technology-mediated delivery systems.

For UTech, the introduction of Distance Learning (DL) has represented a significant paradigm shift in expanding beyond the traditional ways of delivering education at specific brick and mortar locations. In charting a new course for flexible/multiple access, within a rapidly growing and competitive market for higher education, the UTech leadership has focused on capacity building in terms of appropriate organizational structures with competent staff, appropriate policies and procedures to ensure a relatively smooth and effective transition to a dual/blended mode institution that offers high quality academic programmes and services.

This paper provides a conceptual framework for reviewing the institutional development experiences in implementing a comprehensive DL strategy, through the lens of an organizational change management model known as the McKinsey 7-S Value Based Framework, illustrated below:

Diagram 1: The McKinsey 7-S Value Based Framework



Adapted from Waterman et al (1980) and Wikipedia (n.d.)

The McKinsey 7-S Framework highlights the significant impact of seven interdependent elements, which must be aligned and mutually reinforced to ensure the achievement of the intended objectives. The first three elements: Strategy, Structure, Systems are categorized as hard core in defining and directly influencing the organization's existence. The remaining four elements: Shared values/goals, Staff, Style and Skills, are categorized as soft core, being less tangible and more influenced by the organizational culture. However both categories are essential for the organization's success. (Waterman et al.1980, MindTools, n.d.)

The working definitions for each element are summarized as follows:

- Strategy: the plan devised to maintain and build competitive advantage over the competition;
- Structure: the way the organization is structured including reporting relationships;
- Systems: the resources, daily activities and procedures used by staff members to do job;
- Shared Values or Super-ordinate Goals: the core values reflected in corporate culture and work ethic;
- Staff: the employees and their general capabilities;
- Style: the style of leadership adopted;
- Skills: the actual abilities and competencies of the employees working for the organization

In tracking change experiences and key accountability processes in introducing technology-mediated delivery systems at UTech, this paper also shares valuable insights regarding the importance of ensuring clarity of purpose and realistic expectations among stakeholders. As the McKinsey 7-S model suggests, any combination of the elements may be the driving force in changing the organization, at particular times.

UTECH-DL PORTFOLIO: MAPPING THE 7-S MODEL

UTech-DL Shared Values/Goals

The University's seven core values: Respect, Integrity, Excellence, Innovation, Team spirit, Accountability, and Service (RIEITAS) are fundamental to the operations of the DL portfolio. With an increasing learner-centered orientation, there is a cross-functional team spirit in building a culture of innovation and continuous quality improvement towards excellence in support services that reflect the respect for learner choices anytime/anyplace, while ensuring integrity, trust and accountability in the quality assurance (QA) processes that meet international standards. The cross-functional team is coordinated by a central Office of Distance Learning (ODL), which promotes these values in interactions with internal-external DL customers.

The values also reflect the future direction of the organization in terms of its DL aspirations or goals, as infused by the senior leadership. There is an urgency to establish flexible access options and multiple modes, as reflected in the following DL vision statement:

By 2015, the University of Technology will be a regional leader in the provision of blended - distance learning programmes, support resources and consultancy services within the Caribbean and beyond. (Academic Board Paper 2010/A/05/38B, Section 3.2. p10)

This DL vision incorporates the pursuit of excellence in business planning and quality assurance (QA) in the use of guiding principles, best practices and technologies for learning, teaching and research to mitigate specific barriers to access relating to the geographical, chronological and psychological sense of 'distance', within the Caribbean.

In tandem, the UTech-ODL mission statement highlights its primary purpose to facilitate the creation of innovative technology-mediated educational opportunities and increasing options for flexible access by diverse learners, to the high quality learning, teaching and research programmes and services offered by the University.

UTech-DL Strategy

The strategic focus of the UTech-DL operations includes the following three priority targets:

1. **Incubation:** Facilitating an increase in flexible scheduling, multiple access options and innovative curricula through the development and delivery of new blended learning (BL) programmes and services, at international quality standards

2. **Partnership:** Collaborating with internal/external stakeholders to coordinate relevant DL training, development and research initiatives for the effective delivery of customized technology-mediated programme/services to facilitate leadership development in DL across the region.
3. **Applied Research/Funding:** Facilitating the development and demonstration of the UTech-DL Business Planning Model through a project-management approach, to reflect appropriate returns on investment by efficient and effective use of resources, infrastructure and integrated systems.

Within the English-speaking Caribbean, UTech has the competitive advantage in several academic programmes including Architecture, Building and Land Management, Technical Vocational Education and Training (TVET), Hospitality and Tourism, Sports Science, Medical Laboratory Technology, Pharmacy, Oral Health Sciences, and Public Health. UTech's brand of work-ready graduates and world-class athletes is partially based on its cooperative education focus and current Olympic records.

The increasing regional demand for these programmes is forcing UTech to restructure some curricula/scheduling options to offer theoretical aspects online, with practical aspects supervised by in-country coordinators with approved partnering-organizations. For example, the online bachelor degree in Pharmacy will commence in August 2013, with a target group of over fifty students from Barbados, Belize, Canada, Grenada, Jamaica, St. Lucia, while the online TVET associate degree was successfully offered to Grenada in 2008-2010. Several online-blended programmes are under development for 2014, as part of the effort to strengthen the UTech brand.

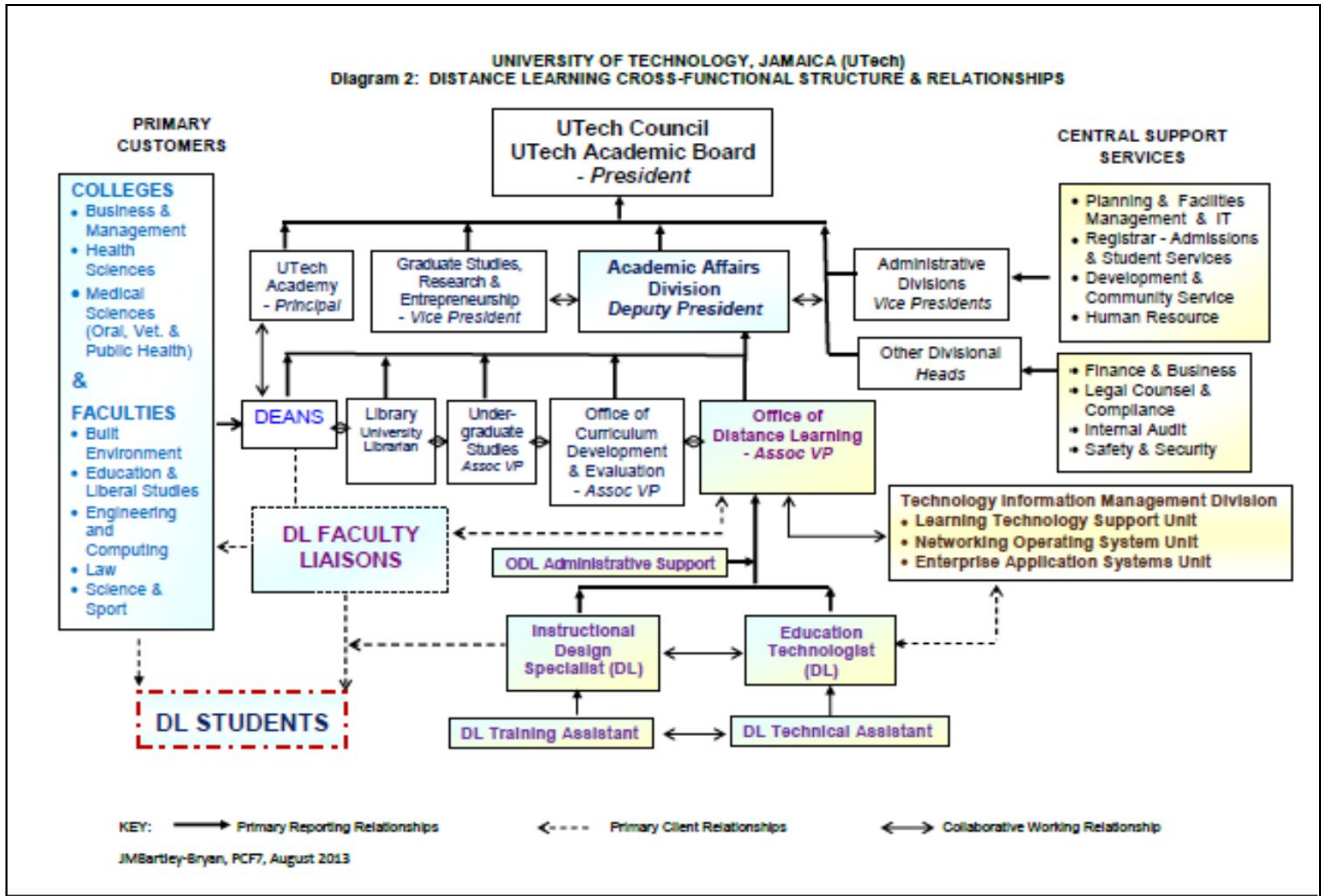
The ODL utilizes a phased incremental approach in coordinating distance learning initiatives. As at May 2013, the ODL had supported over three hundred and fifty (350) or 65% faculty members and over six thousand, two hundred (6,200) or 40% students, utilizing UTechOnline learning management system, videoconferencing and web-conferencing modes for over five hundred and thirty (530) or 33% modules. By 2015, all general education modules will be offered online, to facilitate flexible access for on-campus students.

UTech-DL Structure

As illustrated overleaf, the DL portfolio operates within the existing UTech hierarchical structure. The Academic Affairs Division is at the centre of core business operations, and is managed by unit heads, including the Deans, University Librarian, Associate Vice Presidents, under the leadership of the Deputy President, reporting to the President. All administrative divisions are headed by a Vice President or Senior Director reporting to the President, and collaborating with the academic units, as their primary clients.

There is a dynamic functional tension between the autonomous academic units - Faculties, which undertake the core business of teaching and learning, and the central administrative units which coordinate the essential support for the core business to be achieved. Both categories of units are interdependent, while some functions for decision-making and budget management are decentralized, with the faculty/colleges establishing their own operational structures,

Within this context, UTech-DL is a strategic priority, so all academic units have related targets for programmes and students, while the administrative units have related service support targets. Ultimately, the students are the primary clients for all units.



For the ODL as a central academic support unit, the evolving structure emphasizes strengthening the operations of the Faculties/Colleges through the use of various templates, checklists and sample documents to ensure compliance with international quality standards; while coordinating specialist support functions from the centre. The role of the DL-Faculty Liaison is integral to this relationship, and over time the ODL has been training/coaching/interacting with specially appointed faculty champions, to facilitate expertise and experience in DL theory and practice, to become the real drivers of DL at UTech.

A team approach is critical to the success of UTech-DL. Through its specialist managers and the DL-Faculty liaisons, the ODL has been developing service level agreements with the central academic, administrative and technical support units. The ODL also coordinates cross-functional team-meetings for DL programmes, managed as projects for development and delivery. The positioning of the ODL within the Academic Affairs division and reporting to the executive leadership, allows for the strategic integration of DL targets within all core processes of UTech and the gradual paradigm shift to a dual/blended mode institution.

UTech-DL Systems

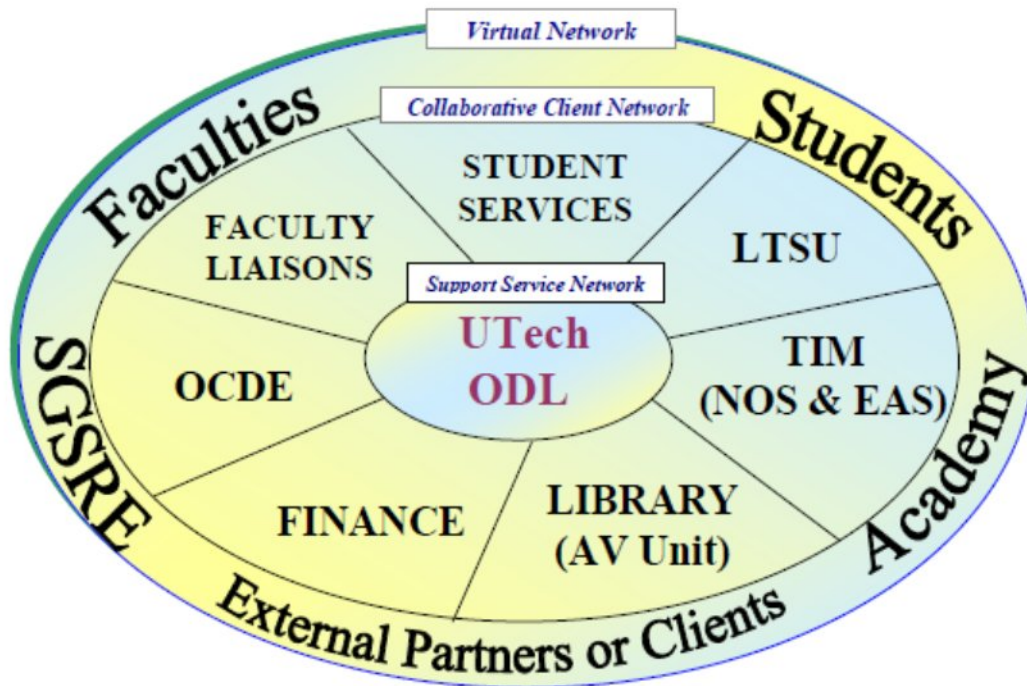
The UTech-DL support for all campuses is centrally coordinated through the ODL, which is physically located at the main Papine campus. The ODL acts as a clearinghouse and utilizes an integrated total systems approach (see Diagram 3 below), through collaboration with colleges/Faculties and other pertinent central service units to facilitate the cross-functional support. The controls are monitored and evaluated through three primary networks: central support services, client-users collaboration; and virtual communication.

The ODL is primarily responsible for the following functions:

- Coordinate cross-functional work-teams to develop the DL policy framework, strategic guidelines, quality standards and operational procedures for effective decision-making and implementation of initiatives;
- Provide leadership, consultation and collaboration on specific projects with external partners and professional associations for capacity-building to support distance learning;
- Coordinate faculty training, coaching and instructional support for distance learning;
- Support academic units in developing DL needs profile; research development and selection of appropriate DL technologies; and collaboration with other relevant units for DL quality assurance;
- Serve as an incubator/experimenting/piloting unit for infusing technology-mediated learning formats, innovative curriculum with flexible scheduling and affordable options

The ODL has been documenting the emerging SOPs for various DL formats by providing activity sheets and video tutorials for training; collating toolkits with required forms, templates, checklists, process maps and flowcharts; and providing online procedural guidelines. Most of the internal rules or DL governance procedures relate to demonstrated need and feasibility, improving quality of teaching and learning with technology, compliance with relevant accreditation standards and ensuring quality equivalence with face-to-face offerings, financial sustainability and overall learner support /customer service systems.

**Diagram 3:
UTECH DISTANCE LEARNING
INTEGRATED SUPPORT SYSTEMS**



KEY: ODL = Office of Distance Learning
 LTSU = Learning Technology Support Unit
 NOS = Network Operating Systems Unit
 AV Unit = Audio-Visual Unit

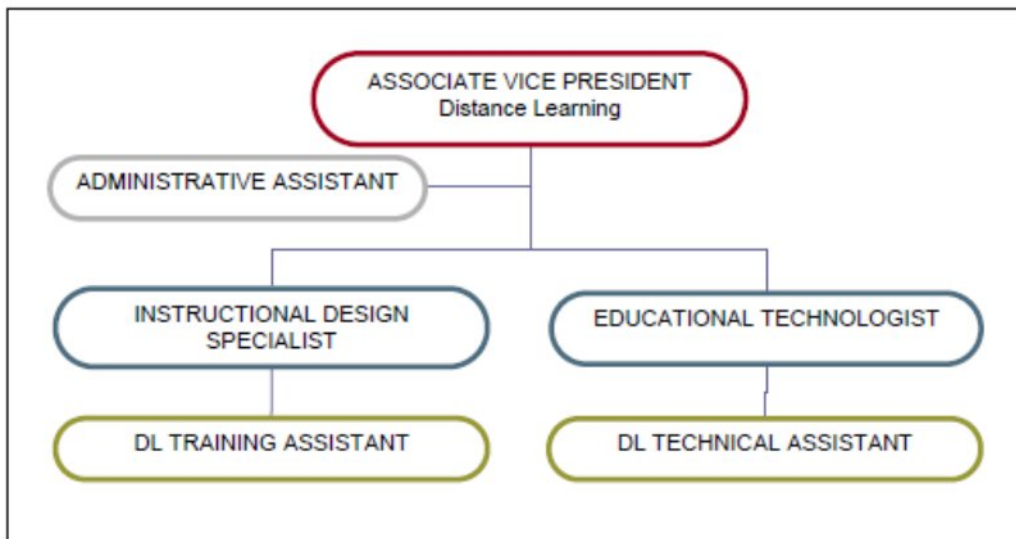
OCDE = Office of Curriculum, Development & Evaluation
 TIM = Technology Information Management Department
 EAS = Enterprise Applications Systems Unit
 SGSRE = School of Graduate Studies, Research & Entrepreneurship

At the core is the UTech-ODL, which coordinates the activities within and across each level, to ensure high quality standards of the distance learning outcomes. The Support Services Network is comprised of all academic (Faculty Liaisons, OCDE, Library), administrative (Student Services, Finance) and technical (LTSU, TIM, AV Unit) support units. The Distance Learning Client Network is comprised of the end-user Faculties, Students, UTech-Academy, School of Graduate Studies, Research and Entrepreneurship, external Partners and Clients. All stakeholders are interconnected through the Virtual (technology-mediated) communication network for effective information-sharing, decision-making and interaction.

UTech-ODL Staffing: Key Positions

On Diagram 4 below, the key positions for the UTech-ODL reflect the minimum core of trained personnel required within a central DL hub. These positions coordinate instructional design, training, and educational technology guidance to meet international quality standards for distance learning. Other core support functions such as technology systems management, facilities management, finance-business management and evaluation for quality assurance, are performed by other pertinent central units, as shown on Diagrams 2 and 3 in preceding pages. The Associate Vice President (Assoc. VP) for Distance Learning collaborates with the heads of these units and coordinates cross-functional work teams to meet timelines and quality standards. Part-time or temporary personnel are also hired, as necessary on a project basis, to support special distance learning activities including consultancies that will generate income for the University.

Diagram 4: Staffing Positions within the Office of Distance Learning (ODL)



The ODL is led by the Assoc VP with the requisite blend of academic, technical and managerial experiences and expertise. Given the strategic priority of distance learning, the Assoc. VP has participated in the deliberations of the UTech academic leadership team and senior management team, and supports the Deputy President with strategic planning, development and implementation of DL initiatives. The Assoc VP is supported by an administrative assistant who manages the overall office operations, and monitors the productive interactions with internal-external stakeholders.

Within ODL, there are two specialist managers: Instructional Design Specialist and Educational Technology, reporting to the Assoc. VP. The Instructional Design Specialist provides technical assistance in developing learner-centered design formats and pedagogical approaches, using appropriate educational technologies (particularly online applications). The Educational Technologist guides the development and effective use of advanced information communication technologies including multimedia resources for teaching, learning and research in technology-mediated environments. Each specialist-manager is supported by a qualified assistant.

All ODL staff members seek to ensure core DL operational support services are provided for the related programme services. They work with cross-functional, multidisciplinary teams from the faculties and other central support units, and act as the primary UTech-DL resource personnel and liaisons to both external - internal constituencies. More specifically, the ODL staff is responsible for the following functions:

- Facilitate the planning, development, delivery and evaluation of DL initiatives in collaboration with appropriate academic and administrative units;

- Ensure relevant approval procedures for DL initiatives, prior to implementation;
- Collaborate with other central units to provide appropriate services to faculty, students and other stakeholders;
- Facilitate DL orientation, training and development of all relevant personnel
- Coordinate DL data collection, analysis and reports;
- Facilitate DL assessment, evaluation and accountability measures in collaboration with other central support units such as the Office of Curriculum Development and Evaluation;
- Represent the UTech-DL interests to appropriate national and international agencies.

UTech-DL Style

With autonomous and centralized units, several leadership styles have co-existed within UTech, allowing for academic success through individual and team achievements. However, one dominant leadership feature tends to be the committee approach to decision-making. Notwithstanding the role of positional leaders and teamwork by functional responsibilities, there are effective committees comprised of delegates from pertinent units, ranks and primary client groups, who achieve group-based decisions on most critical issues.

The UTech committee system generally reflects leadership by consensus, with the following group decision-making features:

- collaboration among stakeholders in sharing concerns for deliberations;
- cooperation towards the best decision, rather than competing for personal preferences;
- equity in opportunity for stakeholders to contribute ideas;
- inclusion of as many stakeholders as possible;
- participation by soliciting input from pertinent decision-makers;

Some committees have required unanimous consensus while most have required simple majority votes, allowing the casting vote by the chair or executive manager. This style encourages members to focus on the group interests above individual preferences. Consent tends to be genuine and less by force, duress or fraud, and lobbying occurs. However, consensus-oriented leadership requires much time and effort for meetings and general agreement on the best decision for all.

The committee system and leadership by consensus have worked well to facilitate the introduction of blended-distance learning as a paradigm shift for UTech. DL champions or advocates among executive leadership, early adopter-faculty members and student leadership have been able to present acceptable justifications, while allowing for extensive debates and expressed skepticism regarding the threat of diploma/degree mills and technology-panacea. The ODL has anticipated some questions/concerns, facilitated discussion forums, orientation sessions and pilot projects to dispel some myths regarding the promises/pitfalls of distance learning. One significant ODL activity is the comparative analysis of resources allocated (e.g. parking, classrooms, restrooms) for one course taught face-to-face, against that same course taught online or by other modalities.

The main benefit of leadership by consensus is that with collective decisions and adoption of DL targets as strategic priorities, the ODL promotes the value-added dimensions for different constituencies. The ODL utilizes an Academic Collaboration Model, which balances bottoms-up drive for adopting distance learning with top-down endorsement of cross functional work-teams and allocation of resources.

The UTech environment also facilitates transformational leadership by ODL, on the following terms:

- Inspirational motivation by sharing DL vision to challenge peers to invest talents, implement high standards and find meaning/purpose in developing DL;
- Individualized coaching and respect for the needs and contribution of each DL constituent;
- Intellectual stimulation to challenge assumptions, take risks, solicit ideas, encourage creativity and independent thinking for developing DL;
- Idealized influence through early adopters as role models and champions to demonstrate practicality/feasibility of technology-mediated environments.

UTech-DL Skills

The ODL is guided by a list of ten core skills/competencies required of DL practitioners/coordinators, as outlined by Thach and Murphy (1995), and relevant nearly two decades later. Though generally applicable to any organization, these skills are essential for successful distance learning: knowledge of DL field, knowledge of DL technologies, DL technology access, planning, organizational skills, language proficiency, writing skills, interpersonal communication, feedback skills, collaboration and teamwork.

All ODL staff members demonstrate above-average proficiency levels in all areas, with outstanding strengths for specific positions. The instructional design support team is outstanding in language proficiency, writing skills and feedback skills; while the educational technology support team is outstanding in application of distance technologies and technology access. All members have to be outstanding in planning, especially for contingencies.

Ongoing exploration and development of ODL staff members are reinforced by regular technical reviews, coaching, in-house training and external courses. Personal development targets are identified by each member and supervisor during annual performance reviews.

All DL faculty members are required to participate undergo training, coaching and orientation before adapting/developing materials for DL. Training and coaching are offered at three levels: basic, intermediate and advanced, depending on readiness levels. Topics include the DL environment, instructional design process, select technology tools, managing online-blended learning, managing interactions, troubleshooting, intellectual property rights and copyright. A proposed UTech teaching certificate will include online-blended teaching skills.

Student orientation and integrated help desk support are priorities. Monthly DL Forums, weekly webinars and other online professional development opportunities are promoted across campuses for all staff. The ODL will be launching the UTech Virtual Learning Centre during 2013-14 to showcase best practices and to consolidate orientation, training and development for all stakeholders.

UTECH-DL PORTFOLIO: THE CHANGE EXPERIENCE & ORGANIZATIONAL REALIGNMENT

Over the past decade, UTech has experienced several levels of organizational change including restructuring and physical expansion to four new campuses across Jamaica, incorporation of new schools/departments and new programmes such as Oral Health Sciences and Nursing from government divestment, development of new programmes/Faculties such as Law; organizational merger and collaboration with various institutes; new systems and processes with a new President, Deputy President and appointment of new senior leaders such as Deans, Heads of Schools, Librarian, Vice President.

A septennial review is due in 2014, so ODL will complete its self-study to ensure that the current DL structure, strategy, and systems are consistent with the shared values; while strengthening the support and interactions among hard and soft core elements. Emphasis will be on readjustment and realignment to alleviate confusion, friction, gridlock, internal competition, distractions, delays and underperformance in any major development area. The focus in the months ahead will be increased synergy, resource mobilization and pursuit of opportunities as UTech expands distance learning to the Caribbean and beyond.

REFERENCES

- MindTools (n.d.). *Mckinsey 7-S Model, Ensuring That All Parts of Your Organization Work in Harmony*. [Online]. Retrieved on June 20, 2013 from http://www.mindtools.com/pages/article/newSTR_91.htm
- Thach, E. C., & Murphy K. L.(1995). Competencies for distance education professionals. Educational Technology Research and Development, 43(1), 57-79.

University of Technology, Jamaica (2010). Academic Board Paper 2010/A/05/38B. University Secretariat, Office of the Registrar. Kingston, Jamaica.

Waterman R.H. (Jr.), Peters T.J., & Phillips J.R. (1980). *Structure is Not Organizations*. Business Horizons, June 1980. pp.14-26. [Online]. Retrieved on June 20, 2013 from http://www.tompeters.com/docs/Structure_Is_Not_Organization.pdf

Wikipedia (2013) *The Mckinsey 7-S Model* [Online]. Retrieved on June 20, 2013 from http://en.wikipedia.org/wiki/McKinsey_7S_Framework