Planning from Division to Institution:

The Division of Teaching and Learning Technologies at the University of Mary Washington

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In sleepy Fredericksburg, VA, halfway between the two dynamic political and cultural

centers of Richmond, Virginia and Washington, DC, lies one of the most progressive and

innovative centers in academic technology. Gaining increasing attention for intriguing projects

like A Domain of One's Own and its new Digital Knowledge Center, the Division of Teaching

and Learning Technologies (DTLT) at the University of Mary Washington (UMW) is earning a

national and international reputation as a leader in academic technology (Gold, 2012; Udell,

2012).

In this paper, I take a close look at the strategic planning documents that surround the

DTLT. One is the 2009-2014 strategic plan for the UMW (UMW, 2009) that was formally

adopted just prior to the appointment of the current university president in 2010. This is a

professionally polished strategic plan that is generally in line with the state of the art by

contemporary standards. The other document is less formal but represents the documentation

most closely resembling a formal strategic plan on file for the DTLT. It is a letter written by the

DTLT to the aforementioned President Hurley in response to meeting they held in the summer of

2010. The idea is to investigate these two documents to unearth alignments and misalignments

that may be impacting the DTLT's pronounced success. This project is an extension of the work

that began in an analysis of UMW's mission and vision statement (Miller, 2015). In that work, I

identified the university's student-centered orientation, high regard for instruction, and desire to

foster a culture of engaged teaching and learning as clear openings for the work of the DTLT.

The shift to analysis of strategic planning documents in this paper reveals a more nuanced

understanding of the relationship between the two entities.

I approach this analysis in four parts. First, I review both entities as context for the

analysis, outlining their histories and organization. Second, I introduce the planning evaluation

criteria proposed by Chance and Williams' (2009), and then move to compare the two entities'

strategic plans utilizing those criteria. The focus of the comparison is to reveal how the two

entities' formulations of their objectives and roles interact and align. In the third part of the

paper, I launch a holistic critique that considers the strengths and weaknesses of the two

documents as well as their propensity for progressive engagement with teaching technologies.

Finally, I conclude the paper with a review of this project that refers back to the first stages

(Miller, 2015) and how the mission and vision of the UMW interact with the planning documents

outlined here.

Context

The UMW is a public liberal arts and sciences university offering both undergraduate and

non-doctoral graduate degrees and is focused on undergraduate education over research. The

college was founded in 1908 as a State Normal and Industrial School for Women, and then

served as the women's college of the University of Virginia (UVA) from the 1940s to the 1970s

(UMW, 2015). In the early 1970s, the college became coeducational and shortly thereafter was

reorganized as a college independent of UVA. It was only 11 years ago that the General

Assembly of Virginia decreed the "University of Mary Washington" name for the institution

(UMW, 2015). Currently, the university enrolls approximately 4,000 undergraduate and 500

graduate students. UMW is rapidly expanding. The graduate schools were opened at a second

campus in nearby Stafford County in 2004, and the third campus in King George opened in

2012.

Nested inside the growing university (see Figure 1), the DTLT is tackling project after

project and gaining increasing national and international attention for their innovative and

exemplary practices. The modest staff of six have launched some groundbreaking initiatives

while maintaining a dedication to sharing their work with the larger academic and technology

communities. For instance, in 2014 the DTLT launched a program to provide every student,

faculty, and staff member with no-cost access to their own internet domain. Titled, "A Domain

of One's Own," the project is focused on fostering innovative teaching and learning with the web

as well as educating students - as well as faculty and staff - about managing their digital

identities. Another example is the creation of a new student resource center for digital

academics, the Digital Knowledge Center also launched in 2014. Not unlike the various

academic support centers based in writing, this center conducts similar work that the DTLT has

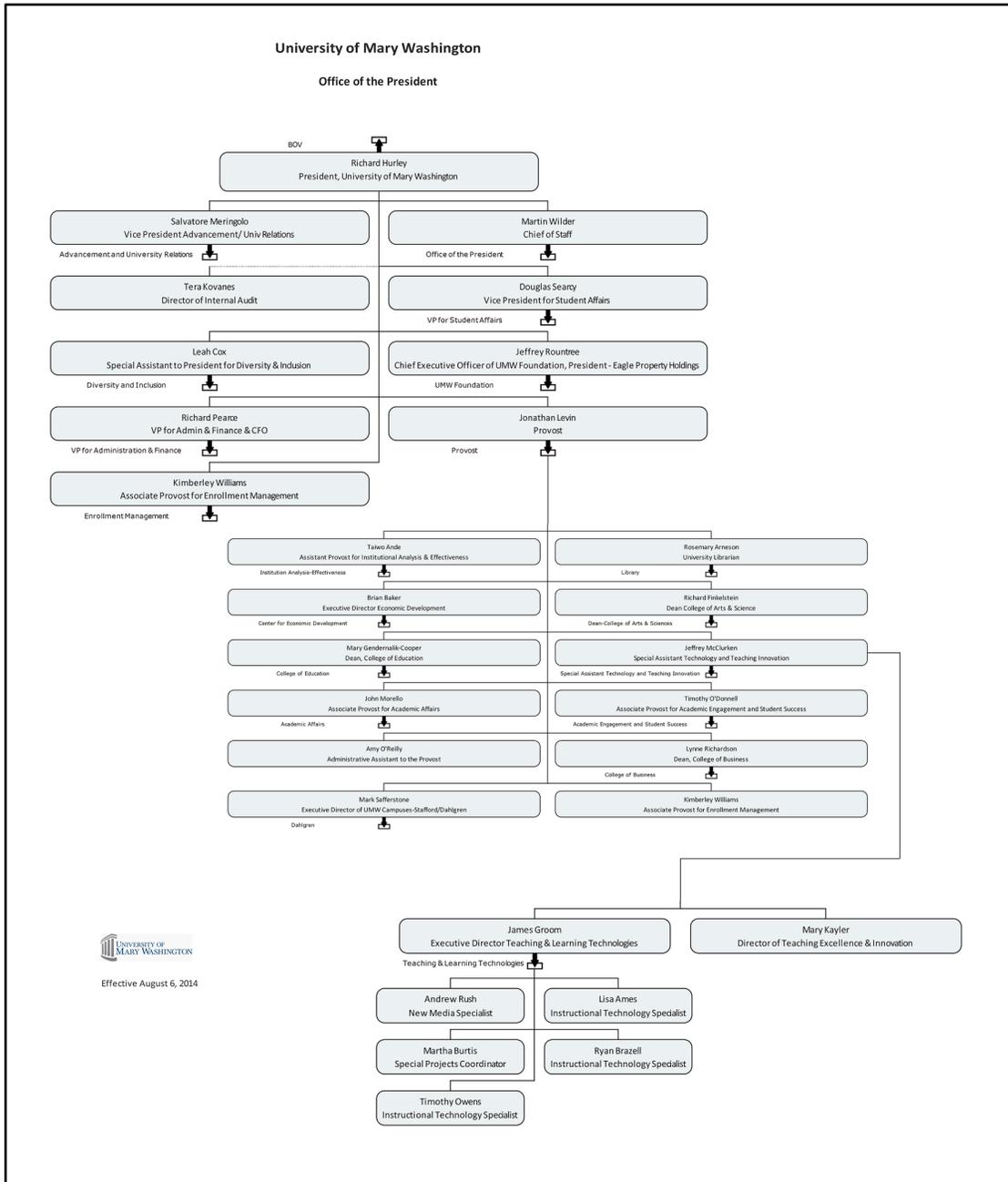been doing in support of faculty, but now engages students.

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Effective August 6, 2014

Figure 1: Organization Chart of the Division of Teaching and Learning Technologies within the University of Mary Washington.

Comparison

Criteria

To structure my comparison of these two nested entities, I draw upon a rubric proposed by Chance and Williams (2009). Although tools for examining the process of planning exist, Chance and Williams point out that tools for assessing the quality of the plan itself are scarce. This particular rubric is thoroughly researched and sustains a high degree of construct validity. This validity is substantiated by engagement with an array of perspectives surrounding strategic planning from a variety of literatures. Chance and Williams' rubric is grounded in a deep questioning of the applicability of traditional strategic planning models from private industry. These linear models, they argue, offer a limited and prescriptive approach to planning that fails to account for the unknowns and dynamics that frequently impact higher education. For Chance and Williams, there is much more traction for responding to increasing calls for accountability in nonlinear models that are tailored for higher education. These models are more responsive to emergent and cultural perspectives to strategic planning that resonate with academic stakeholders.

The rubric proposed by Chance and Williams is a simple table. The vertical columns represent levels of quality borrowed from Driscoll and Wood (2007) with possible ratings of "excellent," "good," and "poor." Chance and Williams added a fourth quality rating category, "inconsequential," to denote situations where omission of a particular component does not negatively impact the strategic plan. The horizontal rows delimit 11 categories typically present in a strategic plan, and are organized using Holcomb's (2009) five critical questions. These five

questions prove to be a powerful lens for unearthing underlying assumptions in the strategic

planning process that are evident in the final plan.

Analysis

The plans of an entire university and a single division within that university are

admittedly of entirely different scopes. What I present in this section of the paper is not intended

to reveal one plan as superior or more efficacious than they other. Rather, what will be revealed

are the areas of the plans that invite the most cogent levels of comparison and critique in the

search for alignment or misalignment as the case may be. This is all the more important to point

out because the document detailing the DTLT's strategic thinking is not a formal strategic plan,

but instead a communication directed at the university's president. The formal UMW strategic

plan analyzed here was officially adopted in Novemeber 2009 and was to implemented from

2009-2014. The DTLT's letter was written about a year later in 2010 following a meeting with

the then incoming President Hurley. Thus the DTLT had the opportunity to think through their

mission, goals, and objectives with insights from both the new president and the existing

strategic plan.

A summative table of the analyses of the two documents appears in Table 1. The rubric

was applied more strictly to the UMW strategic plan because it is precisely the kind of document

that the rubric was designed for. However, more discretion and flexibility was considered in

applying the rubric to the DTLT document. I focused more narrowly on the intent of the rubric

categories and levels of quality with the intention of drawing attention to where the two

documents hold substantive overlap.

Table 1

Comparison of Strategic Plans per Chance and Williams (2009)

Rubric Component	University of Mary Washington	Division of Teaching and Learning Technologies
Introduction	**Excellent** Clearly and concisely delimits four areas that comprise the rationale for devising the plan.	**Excellent** The audience and the context for the plan are addressed directly, and the purpose of the plan is made clear.
Organization's History and Profile	**Good** A clear overview, but lacking in explicit connections to the plan's goals and outcomes.	**Inconsequential** This section was not included, but it can be assumed that these details were shared with the intended audience at their prior meeting.
Executive Summary	**Good** The introductory section to the plan includes this information but is not as succinct as called for in the rubric.	**Poor** This brief report does include an executive summary, but it is purely a perfunctory shortening of the latter content.
Mission, Vision, and/or Values Statement	**Good** Mission is clear, aligns with values and vision, yet not evocative or impassioned.	**Good** The report emphasizes three guiding values in the introduction that orient the plan.
Summary of Core Strategies	**Good** Alignment with mission is clear, but actionability is ambiguous.	**Poor** The core strategies are merely implied, never cohesively addressed.
Goals/Objectives	**Excellent** This section constitutes the majority of the plan, considerable explanation is dedicated to explicitly addressing eight goals with	**Good** The letter outlines several objectives and provides thorough consideration of the financial and organizational impacts.

	detail addressing intersections with finance, administration, and governance.	
Support	**Excellent** Expanding upon the goals, each is supported by multiple objectives that explicitly delimit practical strategies for implementation.	**Good** Much of the text is dedicated to justification of the presented objectives, but the justification is well balanced by feasibility.
Strategy for Evaluating Outcomes	**Poor** The only mechanism for evaluation is an ambiguous annual report that will track progress.	**Poor** No plans for evaluating the outcomes if any of the objectives are initiated or accomplished
Strategy for Refining a Plan	**Good** Each goal, supported by multiple objectives, include fine detail regarding responsible parties for implementation, yet little to no detail regarding how progress will be monitored, refined, or institutionalized.	**Inconsequential**
Appendices	**Poor** Appendices are listed on the final page of the report, but are not included. Multiple searches of the UMW site returned no results.	**Inconsequential**
Holistic Assessment	**Good** Although the plan has a few areas of weakness, these are overcome by the strengths of the plan's highly detailed goals and objectives that are presented in a way that clearly supports the mission and vision.	**Good** The text exhibits a good deal of long and short term consideration as well as engagement with the larger university, most consequential components are addressed.

Table 1

Critique

Admittedly, mobilizing Chance and Williams' rubric in this more analytical mode rather than its intended evaluative mode stretches the limits of its capacities. Nonetheless, the rubric facilitates a systematic approach to the two documents' content, helping to narrow the focus of the analysis. For instance, there are striking correlations between three successful components: the introductions, values statements, and support. The introduction may seem insignificant to the overall purpose of a strategic plan, but the "excellent" rating for both warrants mention. That both documents clearly communicate an understanding of their purpose and the logical basis for planning implies a degree of institutional maturity. Further, that a division-level entity is so clear about the roles and potentials of planning suggests a level of coherency and constructive culture around planning.

Both documents did well in identifying and clarifying their values. The purpose and guiding principles behind each are brought about and notably resonate with each other. This is due in part to the fact that the UMW plan was already published and adopted when the DTLT document was written. Yet the three principles outlined in the DTLT are not merely copied from the UMW plan:

1. Serving Faculty by Promoting Innovative Approaches to Teaching and Learning

2. Serving Students by Using Technology to Better Understand the Liberal Arts Experience

3. Serving the Community by Sharing Our Work (DTLT, 2010, p. 1)

Each of these principles is supported by direct references to language in the values statements of the UMW plan. In this way, the DTLT is able make their contribution to the whole institution evident in a strategic way. The division simultaneously delimits their particular niche in the overarching strategies of the university.

Although the scores do not match, I was impressed at the level of detail that both documents brought up in support of their goals and objectives. Again it would appear that the UMW strategic plan held an influence on the drafting of the DTLT document, as the specificity and scope of the latter seems to echo that of the former. Yet the details in the DTLT document appear to ensure that the goals are not dreamscapes of some impossible future, but are practical and necessary changes that will provide direct and visible impacts. Unfortunately, both plans fail to address how those outcomes can be evaluated in any measurable way. This constitutes a distinctive failure on the part of entities, even if it is a common mistake in strategic plans.

Helpful too is recognizing the interrelationship of this division to the overarching institution and the wider academic technology landscape. Drawing upon the work of Senge, Cambron-McCabe, Lucas, Smith, and Dutton (2012) regarding the conception of educational entities as nested, open systems, we can draw some insights from the interactions of these two plans. For instance, the third guiding principle of the DTLT mentioned above directly addresses its relationship to the larger community. In support of this principle, the DTLT claims that it is vital to share and expose their creative activities. To justify this principle to the UMW president, the DTLT document quotes a passage from the UMW (2009) strategic plan, arguing that they must encourage their own "leadership role in serving as an… intellectual resource for our community" (as quoted in DTLT, 2010, p. 1). This complicated intersection of the priorities of

the DTLT, the UMW, and the larger community(s) speaks to both the internal and external influences at work (Senge et al., 2012). The two entities represented by these documents are parts of open systems that influence each others decisions, activities, and plans.

Further insights can be gained from framing the two entities relationship as loosely-coupled (Weick, 1976). This helps to steer away from the associations I have deduced this far that the DTLT's planning is clearly aligned with the UMW plan that came just before it. In focusing on the alignment, how the DTLT might be functioning outside of this alignment is marginalized. In contrast, Weick asks us to conceive of elements of organizations as not just in or out of alignment, but instead as loosely coupled. In this conception, the elements can maintain some autonomy. Therefore, even if the organizational chart in Figure 1 implies a direct line to the top - a linear and hierarchical relationship - we can also consider the relationship(s) between the DTLT and the UMW as "circumscribed, infrequent, … impermanent, dissolvable, and tacit" (Weick, 1976, p. 38). Complicating the relationship in this way limits how much of the DTLT's success we can pin to the alignment of its strategic planning with that of the larger university.

Conclusion

In closing, I come to realize that this process has opened up more questions than answers for my personal inquiry. Although a close inspection of the planning documents related to the work of the DTLT have brought about new understandings, just how the department has been able to foster such a progressive, innovative culture is not yet made clear. The DTLT's staff have displayed a penchant for experimentation coupled with mindful exploration that warrant closer inspection. It seems likely that future inquiry into the functioning of this group would

most fruitfully shift to interviews and observation of the staff themselves. The immediate work

environment, the management style of the director, the interactions with administration, as well

as the students and faculty they directly support are all areas ripe for investigation. In the

meantime I look forward to collaborating with the DTLT team through my own academic

technology work.

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