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| Course Information Management | |  | **ADMIN**  *(Course and Student Administration Team)* |
| The RATIONALEWhat prompted you to participate in the PPR workshop? | | | |
| **Purpose** | Our team maintains all the University's course and student data and throughout the year undertakes some quite large tasks or projects, which means managing course information, getting involved in people processes, but also being responsible for information systems.  We wanted to use the process review to look at improving the 'checking exercise' that we use amongst ourselves and our faculty colleagues to review our course data ensure that all the information is correct going into the new academic year. We wanted to look at our interactions between the faculties and our centre. | | |
| **Stakes** | The accuracy of the University’s course information is vitally important. Without this students will be given inaccurate advice regarding the requirements for their award and potentially would not be able to complete their course successfully and graduate. Meaningful statistics could not be produced for staff and students and the University would not be able to submit accurate statutory returns.  Our team manage the central database records of everything to do with the University's programmes and students and regularly throughout the year, we need to interact with faculties to check things or to get input from faculty. Because everyone is busy, we don’t stop to reflect that much on whether we're asking the right thing of the right people at the right time. So the PPR offered a good opportunity to do that and to get all the relevant people in the room to view the process from both sides to see where there were areas of bottleneck, where there were areas that were problematic or ineffective. | | |
| **Objectives** | * A better understanding from each party involved in this as to how we make the process of managing course and student information more efficient. * To maximise the effectiveness of our processes around the management of course information, how we present that information for checking purposes and how we ensure accurate and timely checking exercise returns. * To understand how to conduct business process reviews and what's involved. | | |
| The PROBLEMWhat was the issue, challenge, opportunity the review focused on? | | | |
| **Context** | Every year the Course and Student Administration Team undertake the update of the University’s course information and associated structures and employ 'checking exercises'. This is to ensure the accuracy of the data so that when students get here in the new academic year, all course data, module data and everything associated with that is correct.  Academic administration managers in each of our four faculties have a broad remit to manage programme administrators, quality officers and student support coordinators, all of them feeding in different bits of information that are either *producing* information that is needed for the central system or *using* information from the system. Historically there are conflicts in the scheduling in terms of the appropriate time to request course information.  Our process review draws in lots of people, because it affects our own Admin team, Academic Administration Managers and their teams plus academic colleagues (subject co-ordinators, programme leaders, module leads) across the University who would be tasked with checking course information within their subject areas. Students as users are a source of consultation and feedback. | | |
| **Need** | The team wished to explore whether current processes best deliver the objectives of effective information management, including how the checking exercises are approached and implemented. Faculty staff were finding they were being asked by the centre to supply information at a point when they didn't have it, as the timing of the request didn't necessarily fit with when things are arranged within faculty.  At the process level, we wished to increase our confidence that the most effective processes are being employed around the management of course information; specifically that:   * each and every component of those processes serves a purpose; * all staff involved understand their role and responsibilities within the process; * documents and version control are managed effectively; and * the Course and Student Administration Team and Faculty colleagues can successfully complete these projects each year and on time.   A key part of the opportunity of doing the PPR was to get the relevant people engaged and understanding what is needed and why the checking process is important. | | |
| **Participants** | * *Head of Course and Student Administration (process owner)* * *Academic Administration Managers* * *Programme Portfolio Managers and their teams* * *Academic colleagues (Subject Co-ordinators, Programme Leads, Module Leads) across the University.  Students as users are a source of consultation and feedback.* * *Quality Assurance* * *Academic Office / Exams* | | |
| The SOLUTIONWhat did participating in the process review achieve for you? | | | |
| **Key understandings** | The course and student information updates is a big project in that it spans multiple months, and handles a substantial volume of information and checking back and forth between the centre and faculty. It is work we do every year, yet we don’t often get feedback from colleagues in the faculties. It was useful to review the whole process and to get the input of relevant stakeholders on the day itself.  This particular process involves us generating all the information that we need to share and we send on to the academic administration managers; the information goes through them and they share it with their academic staff. Mapping out the current processes through the PPR, we could see there were different things happening in the faculties in terms of what they did with it at that point, how they coordinated it in terms of getting the academics to return it to them and then return it back to us. Some were sharing it with their academic course leaders and then everything used to come back directly from the academics to us. | | |
| **Intended outcomes** | * information requests sent at a relevant and appropriate time to faculty so the information they return is timely and accurate * faculty understanding why they’ve been asked for the information and why it’s important to check it properly * streamlined process of information going to and from the faculties | | |
| **Light bulb moments** | The main discoveries from the process review were about disconnects in the timing and the flow of information between the centre and the faculties, and that different faculties were using different approaches.  For a number of years, we just sent out information all together at a particular time of the year. Through mapping this out and talking it through with colleagues in the faculty, we developed a much clearer understanding of when they would know whether there was going to be a change, for example in relation to when that module is going to run. We discovered that we could split the project into different parts or tasks and send out information requests at a time where it is going to mean more to the academics and they are going to let us know the changes they need to make and give us a positive response.  For example:   * *Module schedules*: academic staff being asked to check stuff at a relevant time when they know what might change so that they take more notice of it the request and give us more accurate information * *Coordination*: It took a large amount of time between the four academic administration managers discussing how they all did things differently, which made it hard for achieve consistency in the information that was being returned to us. | | |
| **PPR techniques** | Taking the time to do the SWOT analysis was very useful, as it picked up things perhaps you wouldn’t have considered before. While what we do on a day-to-day basis can actually be very structured and reflective, we're not necessarily really drilling down into the details or picking up on assumptions and different perspectives. What's come out from the time spent on the PPR is not only the focus on a common goal engendered in the approach, but it also the role of good facilitation that allows people to get into the issues a lot more deeply. | | |
| **Actions / next steps** | Actions came out of the discussions on the day; everything that happened afterwards we agreed pretty much during the workshop. This included the kind of wider communications about the changes that we’re making.  After the workshop, the academic admin managers in the faculties fed back instantly to their teams, who are in charge of the program administrators and explained the new process. They accepted the changes to the process, because the rationale was there and it made sense to them. The biggest challenge is always getting buy in from academics. The difficulty is they don't prioritise it; it is not top of their agenda, it is an administrative process. | | |
| The RESULTWhat are the tangible outcomes & impact? | | | |
| **Immediate changes** | The PPR allowed us to have a clear vision of a better process around our course data checking, and we were able to share that information with faculty colleagues via a Google site we created so they understood. It made things clearer in terms of timing and why we were doing things at a certain time; it just seemed to flow a bit better.  During the process review we looked at what needed to be done, where it was currently being done, what time it was being done and that chart was very messy. So we looked at how we could streamline that and make it more efficient for everybody; notably that the academic admin manager roles within the faculty were the linchpin of the new process. | | |
| **Improvements made** | In the new process the information we requested from faculties just goes to and from the academic admin managers. We don’t need to know on the new process map what they do to produce the return, because they had slightly different practices, just as long as the information is being checked and everything comes back through them.  The noticeable change after implementing the new process is it no longer happened that information sent out to faculty from the centre for checking was at an inappropriate time; what we sent was appropriate and at the right time.  From our record systems, we can do a detailed calculation based on the number of requests the faculty has had or the number of things they did on the system when dealing with student requests that we would now deal with, so we had a good idea about the resource savings. | | |

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| **Evidence of benefits** | Feedback from the academic administration managers from their team is that the new setup is better; the way it’s staggered now and how we’re sharing information now at different times of the year. We also removed the split between our undergrad and post grad checking phases, it’s all done together now and that saves time and duplication.  The main measureable thing for us is more engagement and we get a lot more updates returned, because faculty realise they need to pass on changes earlier in the year. The way we have it scheduled now we shouldn’t have lots of request after the process is finished to change more information, which saves time and is much more efficient.  It hasn't finished rolling out so we can monitor specifically yet; there are still more stages to go through that fit across an entire year. Until we’ve had a full cycle, we can't evaluate as to whether the process review worked, in terms of whether it was successful or worthwhile. |
| **Unintended & unexpected** | The PPR we did links with a wider institutional project and so our new processes are changing the work that faculties do or removing some of the work that they have to do because it’s going on within the centre. It was good as a team to understand the structure that we went through on that initial PPR session and we’ve used that again, which has been good.  Interestingly when you talk to the students they don't know about any of these processes. This year I've got an intern working with me who graduated last year and her jaw just dropped, she said I didn't know all this happened and had to happen behind the scenes, how much effort and how many things had to be joined together to produce information they take for granted. |
| **Longer term impact indicators** | Long term success looks like fewer stressed people, people able to take their lunch break, people not accumulating great number of hours of toil because they've had to work late to get something done, so I’ve got seven different team scattered across the campus and if I can identify that one team is really pushed at that point but another team is flat, if I can readjust workload to even it out for everybody, then I guess that the outcome is a happier, more contented, more motivated workforce.  If we can get everything working more smoothly and efficiently then that creates opportunities. |
| Lessons learned - what experience has been gained? | |
| **Prior experience** | I'd been involved with process reviews indirectly, but never been involved directly like this PPR. I think this works well when you have lots of information that needs to be provided. For example, there's a lot of and lots of to-ing and fro-ing with the faculties to allow the exam committees to run smoothly, that’s quite a big thing. This kind of workshop approach to reviewing those processes was really good and really useful. I don’t know whether it would be useful for quite a small task or project. |
| **Participative experience** | Participation for me was about not just my conversations with the central team, but my conversations with my counterparts in the other faculties; we were also able to discuss why we did things differently. We have weekly meetings but there you don't have the chance to go in-depth into something. We used the Terms of Reference and Mapping Activity as a kind of 'debating tool'.  It’s supporting networking and working closely with people; once you get to know people and you create that personal link then everything else flows from it. I can sit down and I can write a process and it's very logical but for me the challenge is working with the people that you've got to make it happen. The starting point is agreeing what the efficient process is but the challenge actually is then making that process happen. Being involved in the PPR means being able to understand why a process is as it is and how you’re doing things so that you can explain to people who are being asked to produce this information. |
| **Personal skills / application to other processes** | The main reason why I wanted us to do this PPR as a team in the first place was understanding how to do it and I think that has been really good. I do like structure and the PPR has been used again for quite an important large scale project that we’re undertaking right now. We applied it again 8 or 9 times and I think even if we didn’t have this other large institution-wide project going on, we would just be using it anyway; those methods of doing process review are very useful. So we followed the same PPR approach and it’s good; it seems to work, not just for us, but these other projects that have been on-going. For that part of the day when you’re doing the SWOT analysis, it's difficult not to just switch automatically over to thinking about the new way you want to be doing the process.  By aiming to get an outcome and not waste time, you need to keep things focused, that is a big challenge; trying to get colleagues to really focus and not drift on a tangent, where you actually want people to concentrate and come back to what you're meant to be talking about. It is skilful. We had one or two people within the team who had experience doing process maps and things before, but now generally the members of my team can lead these processes; they are quite happy to just get on and generate process maps and everything else, so it’s definitely a positive impact from that initial workshop and the subsequent ones that we have done.  I gained a greater understanding of why things are done and it's been valuable to have an input into that. It's also helped me think about how I manage my teams and looking at my calendar year in a more structured way in preparation for a relocation. So it was kind of a dual thing, me getting from my team what they think they do at particular times of year, but also using a process review informally to enable them to interact with each other better. |
| **Success tips** | * It was important that we had everybody present, all the people from my team were there and administration managers from the faculty. There was a maximum limit of 12, so although on our own we might have been tempted to expand this and have one or two academics there, the higher numbers in the workshop might have reduced the effectiveness of the group discussion. Since the academic admin managers and faculties were representing them and it worked fine anyways. * Implementing the changes was not very difficult, because we manage that whole process, and we'd created a detailed plan in the PPR of what was changing, when we would do things and how. The involvement from the faculties and their input into the new processes was critical to getting the new processes up and running. I think for me it is about how people work with each other, rather than the nitty-gritty of a process. * We also have a forum that this team runs where we go to the faculties, catch up on all the work that we do together and discuss different things. Because there were more colleagues from the different admin teams and the faculties there, we went through the exercise and there weren’t many questions about it because everybody agreed it was a better way of doing it. Because it was quite clear, it didn’t generate that many queries. * You need some space to see how the new process beds down in reality, for things to actually happen and for us to be able to evaluate before we do anything else. |