

Project Acronym: DERBI
 Version: 1.1
 Contact: Jean Mutton
 Date: 2009_10_01



Project Document Cover Sheet

Project Information			
Project Acronym	DERBI		
Project Title	Development and Enhancement Review of Business Interfaces – SLRM Pre-registration to Teaching and Learning		
Start Date	29 June 2009	End Date	30 April 2010
Lead Institution	University of Derby		
Project Director	Sue Morrison		
Project Manager & contact details	Jean Mutton j.mutton@derby.ac.uk Tel: 01332 592299		
Partner Institutions			
Project Web URL	www.derby.ac.uk/experience/JISC-enrolment-project		
Programme Name (and number)	OSDEVA02 LIFECYCLE REL MAN		
Programme Manager	Myles Danson		

Document Name			
Document Title	Project Plan		
Reporting Period	<i>for progress reports only</i>		
Author(s) & project role	Jean Mutton, Project Manager		
Date	2009_08_14	Filename	DERBI_projectplan_1.0
URL	<i>if document is posted on project web site</i>		
Access	<input type="checkbox"/> Project and JISC internal		<input type="checkbox"/> General dissemination

Document History		
Version	Date	Comments
1.0	2009_08_14	Project plan submitted for agreement with JISC



Project Plan

DERBI – Development and Enhancement Review of Business Interfaces

Overview of Project

1. Background

The University of Derby is a large, complex organisation with approx 25,000 students. In keeping with the ethos of this post-1992 HEI, Derby has a diverse student body and programmes are offered in a variety of modes of study eg full-time, part-time, distance and blended learning. The project will seek to improve the quality of the student experience from pre-entry to readiness to engage in learning and teaching.

Enrolment, as the point at which an individual's status changes from an applicant to a student, is considered to be significant point for which a review of service design and student relationship management will be beneficial to the wider JISC community . Derby operates an integrated student record, finance and customer relations management system which links to the VLE, IT and Library access, halls of residence, etc.. Integration offers many benefits, not least single data input for multiple purposes, but also presents challenges as processes are highly inter-linked and multi-dependant. Enrolment is perhaps the most complex and multi dependant process operated, yet one which is critical to get right if we are to deliver a quality student experience, add value and continue to build relationships through the interactions with students. Derby offers students online enrolment off-campus and, supplemented by support, using IT facilities on-campus.

The University uses a variety of communication methods to build and maintain our relationship with students, including one-to-one and group face to face sessions, letters, text, email (individual and auto-generated), social networking, Wimba classroom, web-pages, online services and portals, and direct telephone calls. These apply across the range of the student lifecycle considered in the project. The University's student record system, Peoplesoft, implemented in 2005, includes functionality which has been exploited during implementation, for example the development of online enrolment, and other functions, such as 3Cs (communications, checklists and comments) which could add considerable value to student relationship management.

Given the length of the project, efforts will be focused on a review of the experience of enrolment for full-time undergraduate students and on-line learners. Findings which relate to other modes of study and types of student, eg post-graduate will be taken into account in the outcomes but will not be core to this project.

2. Aims and Objectives

1. Use service improvement strategies (service design) to map the student lifecycle from pre-entry to readiness for learning and teaching and scrutinise these with stakeholders.

2. Develop a blueprint of the enrolment process from the student's point of view considering main stages of the process, timing, participants, tangible and intangible aspects of student's experience. This analysis would form the basis of the service improvement plan.
3. Explore the dependencies required to make enrolment effective in an integrated system. Identifying and exploring interface points during the three stages of the student lifecycle.
4. Develop and implement a service improvement plan.
5. Pilot service and system enhancements and measure impact in terms of improved student satisfaction and strengthened relationship management.
6. Review and learn from experience, develop a case study to disseminate findings. Continue service enhancement through further action planning and application of service design techniques in other areas of the business.

3. Overall Approach

Methodology: the approach is one of inclusivity and research will be conducted with key stakeholders using the following methods:

Primary research:

Staff focus groups
Student focus groups
One - to - one interviews
Pilot/trialling
Video feedback
Timing techniques (queuing etc)

Secondary research:

Outcomes from staff and student questionnaires
Programme and subject area annual monitoring reports
Enrolment Planning Group minutes and action plans
Process reviews
Mapping of student communications

Scope: the project will not look to develop any new technological approaches to enrolment support, but will review where value can be delivered from a student experience perspective of the service design, focussing primarily on the experience of Full Time Undergraduate new and returning students, at two enrolment points, September 2009 and January 2010, and also on-line learners. Derby is currently undertaking a project looking at enhancing the student experience of online and distance learners and this project will dovetail with the work being carried out by the Online Project Team.

The project will look at the overarching framework for enrolment. It will not focus on operational issues or a failure to comply with the precepts of that framework, eg validation and/or curriculum build on the students records system, unless these aspects touch directly on the student experience and enrolment. Areas which are directly relevant to the student experience will be identified through process mapping techniques.

Critical success factors: improvement in user satisfaction ratings (staff and students) will be tested to some extent in the January enrolment period, although full benefits will not be realised until the next key point of enrolment for the majority of students - Sept 2010. It is expected that a better student experience will result in improvements to retention rates and staff/student relationships, although measurement and review of these types of outcome sit outside of this current project.

Engagement with the project by staff and students will be critical to success, but there has already been a very positive response from staff in faculties to take part in the project and the Students' Union has given strong support.

Interoperability: by its very nature, enrolment touches on many aspects of University business processes: Finance (fees and invoicing), Quality (validation and programme audit and review), Registry (SLC, student records etc), Faculties (academic and administrative support).

4. Project Outputs

Deliverables for the project will be made available to the community through the project website and will include:

1. Project plan, including quality, evaluation and dissemination plans
2. Service improvement plan.
3. Business process map for the stages in the student lifecycle from pre-registration to learning & teaching;
4. Blueprint of the enrolment process from a student perspective (identified fail points, areas of excessive wait and interactions which are significant in the student experience of enrolment);
5. Case study to disseminate findings;
6. Project website and reflective blog available at <http://www.derby.ac.uk/experience/JISC-enrolment-project> ;
7. Framework exploring approaches to engaging students as partners in service enhancement.
8. A 'lessons learned' log and guidance made available to other HEIs undertaking comparable reviews
9. Reports for JISC as required.

The team will work with JISC to ensure that all outputs are made available through additional routes as appropriate, including presentations at conferences such as the Association of University Administrators and the Student Records Officers Conference.

5. Project Outcomes

1. Evidence of the impact on the student experience of enrolment;
2. An understanding of what it is that is important to the students in terms of adding value;
3. Greater awareness and understanding of service design techniques and how they can be applied to the student lifecycle;
4. Increased engagement of students as co-producers of their experience at Derby.
5. Enhancement of the student experience at the University of Derby;
6. Shared awareness of findings across the sector, via reports, conference presentations etc.;

7. Continue service enhancement through further action planning and application of service design techniques in other areas of the business.

6. Stakeholder Analysis

Stakeholder	Interest / stake	Importance
Students	Mitigate anxiety	High
	Building a closer working relationship with staff	Medium
	Quicker, slicker enrolment processes	Medium
Academic Staff	Students are properly registered onto programme/modules	High
	Better understanding of student needs	Medium
	Shift of focus from processes to enrichment of the student experience (especially advice and guidance)	Medium
External agencies (HEFCE, HESA, Student Loan Co)	Student details are captured with accuracy	High
Internal project management (eg Project Board, Executive)	Project is well-managed and successful	High
Other internal stakeholders (eg Finance, Quality Dept)	Improved business practices	Medium
University of Chichester and the wider HEI Community	Sharing good practice and experience	Medium
JISC	Project commissioner	High
Students' Union	Better student experience	Medium

7. Risk Analysis

The main risks to the project are recruitment and retention of staff to the project, and effective engagement with staff and students at the University of Derby and the wider external community. These risks are mitigated by the internal profile of the Student Experience strategy, institutional commitment to enhancing enrolment, established framework for consultation through the various groups detailed in this bid, the range of external engagements already negotiated for involvement in action planning and dissemination.

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk
Project staffing	2	5	10	Sound project management (eg record keeping) and spreading of expertise.
Organisational	2	4	8	Ongoing Executive support. Project Board in place and functioning.

Technical	1	3	3	Ensure support from student records team through line management
Competing demands on staff time	3	5	15	Clearly delineated staff roles/line management
Legal	1	2	2	Institution values the project
Low level of engagement of students	3	5	15	Incentivisation. Good two-way communication strategy.
Low level of engagement of staff	3	3	9	Strong communication about the project eg reach out to staff in faculties and departments. Evangelise the student experience benefits.
Mission drift	3	3	9	Close monitoring of project against agreed plan

8. Standards

This section is not thought to be applicable to this project which focuses on service design principles, not IT developments.

9. Technical Development

Not applicable.

10. Intellectual Property Rights

IPR will be retained by the University of Derby, but all the project deliverables, reports and other relevant outputs will be published via the project website and made available, free at point of use, to the academic community in perpetuity and will be disseminated widely by the University in partnership with JISC. The project website will be maintained for a minimum of three years after the project has completed.

Project Resources

11. Project Partners

Not applicable.

12. Project Management

The project is overseen by a Project Management Committee, chaired by Russell Roberts, Deputy Academic Registrar, which reports to the University's Student Experience Strategy Group, chaired by PVC Professor Musa Mihsein. The project will also feed into the University's Enrolment Planning Group, and will report on progress to senior faculty and departmental managers. The team will use the website and blog as a platform for wider information sharing about progress and reflection.

The core project team comprises:

Jean Mutton,
Student Experience Project Manager,
University of Derby

Project Acronym: DERBI
Version: 1.1
Contact: Jean Mutton
Date: 2009_10_01

Kedleston Road
Derby DE22 1GB

Tel: +44 (0)1332 592299
Fax: +44 (0)1332 597754
Email: j.mutton@derby.ac.uk

Rachel Crane, Admin Assistant (Student Placement)
University of Derby,
Tel: +44 (0) 1332 591493
Fax: +44 (0) 1332 597754
Email: r.crane@derby.ac.uk

Both will contribute two days a week to the project.

The project is overseen by:

Sue Morrison, Senior Assistant Registrar (Student Experience)
University of Derby
Tel: +44 (0)1332 591956
Fax: +44 (0)1332 597754
Email: s.morrison@derby.ac.uk

Sue Morrison is Jean Mutton's direct line manager and Rachel Crane is co-managed by Jean Mutton and another member of staff in SM's department.

Polina Baranova, a lecturer in the Derby Business School, will act as a consultant on systems process design to the team. Polina is also running workshops on service process design and mapping for the core project team, Board members and key stakeholders.

Training on mapping tools such as Visio will be sought for the core project team. Rachel Crane will also be receiving a variety of other training and staff development packages as part of her student placement year.

13. Programme Support

Training on JISC project management techniques has already begun with a two-day conference at Aston Conference Centre, held on 29th and 30th July 2009 which was attended by PB and JM. This event was also a very useful means of networking with other HEIs on similar projects.

Support has been offered by JISC; other HEIs in the programme will offer ongoing peer support as the project develops. Staff from CETIS will also be supporting the project and offer a confidential troubleshooting service.

Graham Fice, Director of Student and Academic Services at the University of Chichester and Chair of the Student Records Officers Conference (SROC <http://www.sroc.ac.uk>) will be acting as a critical friend to the project.

14. Budget

See Appendix A.

Detailed Project Planning

15. Workpackages

Further details are contained in Appendix B.

WORKPACKAGES	July 2009	A	S	O	N	D	J	F	M	April 2010
Continuous evaluation to take place throughout the project										
1: Project set up										
2: Review and research										
3: Preliminary understanding										
4: Modelling										
5: Authentication										
6: Implementation										
7: Dissemination										

16. Evaluation Plan

Evaluation of the project will fall into two strands: evaluation of the progress of the project against the agreed plan and evaluation of the level of achievement of the project with regard to the stated outputs.

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
July	Project set up	Are there any factors which have affected the project? Are project team staff in place? Is the project delivering?	Project blog and website. Report from the Project Manager to the Management Committee.	Project is achieving set objectives (eg website in place). First draft of project plan written.
Aug - Oct	Review and research Project team needs analysis	What is the current student experience of enrolment at Derby? Does the team have the right tools (knowledge,	Mystery shoppers Student surveys Focus groups Previous student feedback/questionnaires Observation of processes Consultant to provide a series of workshops on Service Process Design	Quality feedback on the student experience captured by survey, reporting and videocam. Desk-based research report Attendance at workshops of key stakeholders.

		enhancement? What methods of engagement worked best?	Review of communication strategy.	engagement.
April	Dissemination	Has the project achieved its stated aims? How do we share outcomes with the sector?	Review outputs and outcomes against stated objectives Work with JISC to disseminate findings. Presentations at conferences, etc	Final report produced and accepted by JISC Workshop sessions accepted at AUA/SROC etc

17. Quality Plan

Output	Service Improvement Plan				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
March	Clear, easy to use plan which is fit for purpose.	Feedback by team members Approved by Project Management Committee (PMC) Authenticated by key stakeholders Review by critical friend (Chichester) and Enrolment Planning Group nominee	Comments acted upon and amendments made	JM, PB, SM	

Output	Business Process Map				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
October & April	Usability Scope Accuracy	Feedback by team members Approved by Project Management Committee (PMC) Authenticated by key stakeholders, including Enrolment Planning Group	Comments acted upon and amendments made	JM, PB, SM	

		nominee			
--	--	---------	--	--	--

Blueprint of Enrolment Process					
Output Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
November & April	Usability Scope Accuracy	Feedback by team members Approved by Project Management Committee (PMC) Authenticated by key stakeholders, including Enrolment Planning Group nominee	Comments acted upon and amendments made	JM, PB, SM	

Case Study					
Output Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
March	Completeness Accuracy Shows critical reflection	Feedback by team members Approved by Project Management Committee (PMC) Reviewed by Student Experience Strategy Group and Enrolment Planning Group nominees	Comments acted upon and amendments made	SM, JM	

Website and Blog					
Output Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Ongoing	Content Usability	Feedback by team members and users of the site	Comments acted upon and amendments made	JM	

Framework for Student Engagement					
---	--	--	--	--	--

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
April	Usability Scope Accuracy	Feedback by team members Approved by Project Management Committee (PMC) Authenticated by key stakeholders Reviewed by Student Experience Strategy Group nominee	Comments acted upon and amendments made	SM, JM	

Output	'Lessons Learned' Log				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Ongoing	Usability Scope	Feedback from team	Comments acted upon and amendments made	JM, SM, RC	

Output	Reports as required for JISC				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
April	Conformity with JISC guidelines	Feedback by team members Approved by Project Management Committee (PMC)	Approval by JISC	SM, JM, JISC	

18. Dissemination Plan

Key deliverables and outputs will be accessed by the academic community and the National Union of Students via the project website <http://www.derby.ac.uk/experience/JISC-enrolment-project>.

Other planned activities are detailed below.

Timing	Dissemination Activity	Audience	Purpose	Key Message
Ongoing	UoD staff briefings	All University staff with an interest in enrolment	To keep staff up-to-date on progress	Review and progress of the project
April 2010	Final report on project	JISC	Project evaluation	Achievements/lessons learned.

March 2010	Association of University Administrators Conference	Staff in HEIs across the sector with an interest in enrolment or the Student Experience	To share outcomes and good practice	Application of systems design techniques to the enrolment process. Sharing of service improvements.
April 2010	Student Records Officers' Conference	Staff in HEIs with responsibility for student records and data	To share outcomes and good practice	Application of systems design techniques to the enrolment process. Sharing of service improvements.

19. Exit and Sustainability Plans

Project Outputs	Action for Take-up & Embedding	Action for Exit
Website	University to continue to provide technical support and maintenance	Maintain website for minimum three years after project closure
Map, blueprint and improvement plan	Project to drive embedding of change process within the University	Revised business processes to be adopted and built into service design
Framework for engaging students in service design	Internal and external dissemination	Report and presentations at conference etc

Project outputs which have sustainability and the potential to live on after the project ends..

Project Outputs	Why Sustainable	Scenarios for Taking Forward	Issues to Address
Techniques for mapping service design	Can be applied to other stages in the student lifecycle	Consider other areas of service within the University and Students' Union and which could benefit from this approach. Further benefits realisation across the sector may be appropriate.	Appropriate level of funding support and commitment from the University.
Framework for engaging students in service design	Can be applied to other areas of the student experience	Consideration by the Student Experience Strategy Group. Further benefits realisation across the sector may be appropriate.	Continued commitment from the University to engage students as co-producers of the student experience. Appropriate level of funding support for sector benefit realisation.
Process map, blueprint and improvement plan for enrolment	Can be extended to cover other types of student/modes of study	Enrolment Planning Group to continue to apply techniques to the wider Derby student community. Enrolment Planning Group	Continued commitment from the University.

		<p>to continue to develop and enhance the service design considered within the scope of this project.</p> <p>Further benefits realisation across the sector may be appropriate.</p>	
--	--	---	--

Appendixes

Appendix A. Project Budget

Appendix B. Workpackages

APPENDIX B



JISC WORK PACKAGE

WORKPACKAGES	July 2009	A	S	O	N	D	J	F	M	April 2010
1: Project set up										
2: Review and research										
3: Preliminary understanding										
4: Modelling										
5: Authentication										
6: Evaluation										
7: Dissemination										

Project start date: *29 June 2009*

Project completion date: *30 April 2010*

Duration: 10 months

				Milestone	Responsibility
WORKPACKAGE 1: Initiate project	29/06/09	28/08/09			
<u>Objective:</u> Project set up and launch					
1. Write project plan	29/06/09	14/08/09	Project plan (including quality, evaluation and dissemination plans)	1	JM, SM

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
2. Recruit to student placement post (admin support)	01/07/09	10/08/09			JM
3. Identify membership for Project Management Committee and set date for first meeting	01/07/09	31/07/09	Hold first meeting (12/08/09)	2	JM, SM, RR
4. Create project website and blog	01/07/09	31/07/09	Project website (went live 28/07/09) http://www.derby.ac.uk/experience/JISC-enrolment-project	3	JM
5. Planning meetings	03/07/09	19/08/09			JM, SM, RR
6. Arrange training on service process design and mapping techniques	03/07/09	19/08/09	Two workshops run by PB (22/07/09 and 19/08/09)		PB, JM
7. Project budget set up on finance system	03/07/09	24/08/09	Project codings generated and monies phased across the life of the project		JM
WORKPACKAGE 2: Review and research	03/08/09	30/10/09			
Objective: Gather all relevant information, conduct additional research and map out current operations					
8. Gather and review data and free comments from previous research	03/08/09	11/09/09	Trawl outcomes from student 'Feedback' campaigns		JM
9. Map out current operation	14/09/09	16/10/09	Business process map of current operation produced	4	PB, JM
10. Plan initial research to take place during Sept enrolment period	10/08/09	25/09/09	Identify and brief mystery shoppers/arrange observations		JM, RC
11. Set up focus groups of staff and students	02/09/09	25/09/09	Collation of feedback from key stakeholders on current processes		SM, JM, RC

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
WORKPACKAGE 3: Preliminary Understanding	05/10/09	18/12/09			
Objective: Review and analysis of feedback and mapping					
12. Collate and analyse information	05/10/09	13/11/09			RC, JM
13. Assess level of engagement of key stakeholders	05/10/09	13/11/09	Good turn out to focus groups, etc		JM
14. Using business process map and feedback, review student experience of enrolment	16/11/09	11/12/09	Blueprint drawn up	5	PB, SM, JM
15. Formative evaluation point of project against plan	11/12/09	18/12/09	Review conducted by Management Committee	6	Management Committee
WORKPACKAGE 4: Modelling	14/12/09	26/02/10			
Objective: To draw up a new process map for enrolment					
16. Review business process map against blueprint	14/12/09	15/01/10	New business process map produced	7	PB, SM, JM
17. Test out map at January enrolment and review	18/01/10	19/02/10	Implementation of new map, looking out for any 'quick wins'		SM, JM
WORKPACKAGE 5: Authentication	01/02/10	31/03/10			
Objective: To get stakeholder feedback					
18. Conduct focus groups of staff and students	01/02/10	26/02/10	Gather feedback on new business process map		JM, RC
19. Draw up service improvement plan	19/02/10	31/03/10	Service improvement plan produced	8	PB, SM, JM

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
WORKPACKAGE 6: Implementation	01/03/10	30/04/10			
<u>Objective:</u> Embed service plan					
20. Revised business process to be adopted in-house and embedded into service design	05/03/10	30/04/10	Run workshops for wider university community on the new service plan	9	SM, JM
21. Share lessons learnt on application of design techniques	05/03/10	30/04/10	Run workshops on the application of service design techniques	10	PB, SM, JM
WORKPACKAGE 7: Dissemination	01/03/10	30/04/10			
<u>Objective:</u> Project reporting and dissemination					
22. Draw up framework on approaches to engaging students as agents in the change process	07/04/10	30/04/10	Share framework for student engagement in-house and also publish on webpages	11	SM, JM
23. Develop case study	07/04/10	30/04/10	Case study agreed at PMC	12	SM, JM, PMC
24. Lessons learnt log	29/06/10	30/04/10	Reflective Log published on webpages	13	JM, RC
25. Dissemination at conferences, etc			Attend AUA in March and SROC in April	14	SM, JM
26. Draw up final report and evaluation of project	18/03/10	30/04/10	Final report to JISC	15	SM, JM
WORKPACKAGE 8:					
<u>Objective:</u>					
26.					
27.					
28.					

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
29.					
WORKPACKAGE 9: <u>Objective:</u>					
30.					
31.					
WORKPACKAGE 10: <u>Objective:</u>					
32.					
33.					
34.					

Members of Project Team:

SM = Sue Morrison (Project Director)

JM = Jean Mutton (Project Manager)

RC = Rachel Crane (Project Admin Assistant)

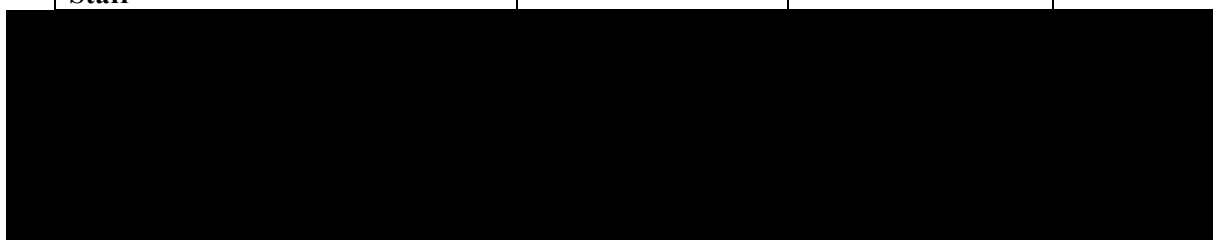
RR = Russell Roberts (Chair of Project Management Committee)

PB = Polina Baranova (Consultant)

**JISC SLRM DERBI Project
Budget Template**

Appendix A

Directly Incurred Staff	June 09 – July 09	Aug 09 – April 10	TOTAL £
-------------------------	-------------------	-------------------	---------



Non-Staff	June 09 – July 09	Aug 09 – April 10	TOTAL £
Travel and expenses	£	£1,000	£1,000
Printing / Stationery / Postage	£	£1,165	£1,165
Hospitality	£	£900	£900
Other			
Student Employment Agency	£690	£13,820	£14,510
Staff Development		£1,480	£1,480
Total Directly Incurred Non-Staff (B)	£690	£18,365	£19,055
Directly Incurred Total (A+B=C) (C)	£2,285	£32,715	£35,000
Indirect Costs (E)	£3,537	£31,833	£35,370
Total Project Cost (C+D+E)	£5,822	£64,548	£70,370
Amount Requested from JISC	£3,785	£46,215	£50,000
Institutional Contributions	£2,037	£18,333	£20,370
Percentage Contributions over the life of the project	JISC 71%	Partners 29%	Total 100%

Resubmitted: 24/06/09