



Project Document Cover Sheet

Project Information			
Project Acronym	PALET		
Project Title	Programme Approval Lean Electronic Toolset		
Start Date	October 2009	End Date	July 2012
Lead Institution	Cardiff University		
Project Manager & contact details	Andy Lloyd, lloyda@cardiff.ac.uk , Tel: 02920 876979		
Project Officer	Georgia Slade, sladegk1@cardiff.ac.uk		
Partner Institutions	None		
Project Web URL	http://www.palet.cf.ac.uk/		
Programme Name (and number)	JISC Curriculum Design Programme 4/07		
Programme Manager	Sarah Knight		

Document Name			
Document Title	Interim Report		
Reporting Period	October 2008 – October 2009		
Author(s) & project role	Georgia Slade, PALET Project Officer and Andy Lloyd, PALET Project Manager		
Date	27/10/2009	Filename	
URL			
Access	<input checked="" type="checkbox"/> Project and JISC internal		<input type="checkbox"/> General dissemination

Document History		
Version	Date	Comments
1	27/10/2009	First draft

Section One: Summary

The PALET project has made significant progress implementing the project plan, has completed the review of the current Programme Approval Process at Cardiff University, and is now moving on to explore options for the 'future state' and to redesign the process.

In reviewing the current process a range of qualitative and quantitative evidence has been collected through stakeholder workshops, desk based research and one-to-one interviews. These contributed to the production of the PALET baseline evidence report, which can be found at: <http://www.palet.cf.ac.uk/BaselineReport.html>.

The project is using the baseline evidence gathered to inform the design of a new process for the approval of new programmes. To address stakeholder concerns, a review of the programme information developed and held to support a programme's operations is also being undertaken. This work has utilised the consultative structures formed to support the PALET project, to develop and enhance the ways in which programme and module information are managed across the university. A new programme specification, module description and programme structure templates have been developed out of this work.

Section Two: Activities and Progress

This report covers the first year of the project, which includes the activities set out in the project planning phase (workpackage 1) and the review of current processes and practice (workpackage 2). These phases have been completed successfully. No major changes have been made to the Project Plan, any minor amendments to this being detailed below. In addition to the baseline review, the project has developed a Communication and Dissemination Plan and an Evaluation Strategy, which was shared with other projects in the programme as an example of good practice.

Project Team / Management Structures

There is one key change to the project team. Richard Trueman, Assistant Registrar for Quality Assurance, has recently moved to work for Cardiff Business School. Whilst we are fortunate enough to still be able to draw upon his experience and knowledge of current Programme Approval Process at Cardiff, he is no longer a core member of the project team. Stephen Griffiths, Assistant Registrar, whose role has been enhanced to cover management of the University's quality processes, will now play a more significant role in the project.

Further members have been invited onto the PALET Steering Group. Dr Robert Dewdney (School of Pharmacy) and Dr Alan Kwan (School of Engineering) now attend, and Dr Alan MacMillan (Aberystwyth University) has recently joined to help ensure external representation on the Steering Group.

Workpackages

A small number of minor amendments have been made to the original project workpackages and project plan [<http://www.palet.cf.ac.uk/documents/PALETPLAN.doc>]. These include:

- The development of a new workpackage to incorporate the work being undertaken to redesign the programme information templates used across the University.
- Changes in the timelines to allow more time to design and develop a redesigned procedure. These have been made in recognition of the need for senior University committees to consider the outcomes from the review of the current process, and to ensure that there is proper stakeholder engagement in the design of the new process.

The delays are manageable, and are not expected to unduly effect the operation of the project or the achievement of its stated aims.

Section Three: Outputs and Deliverables

A broad range of outputs and deliverables will be developed during the life of the PALET project. Further details of the outputs produced to date are given below. Using the tool provided, a map of current and future outcomes has been appended to this report as Annex A.

Project Plan – [<http://www.palet.cf.ac.uk/documents/PALETPLAN.doc>]. Intended to be used mainly by the project team and other internal University audiences, and subject to regular revision, the plan will also be made available publicly via the Project and JISC websites.

Baseline Review Report – [<http://www.palet.cf.ac.uk/BaselineReport.html>]. Produced to document the findings from the review of the current Programme Approval Procedure. Includes a multimedia map with links to video and audio clips gathered through stakeholder workshops.

Communications and Dissemination Plan – Developed by the Project Team to help map out and guide the steps that will be taken to fully inform and involve different stakeholder groups in the project.

Evaluation Plan – Developed by the Project Team and the external evaluator to the Project (Prof. Peter Chatterton) to set out plans for ongoing evaluation. Will be revised and refreshed on an ongoing basis.

Section Four: Outcomes and Lessons Learned

The full baseline evidence report can be found at: <http://www.palet.cf.ac.uk/BaselineReport.html>. The key messages identified in the report are summarised below:

1. The current process is focused primarily on academic matters, and little effort goes into the development of a business case. The result of this has been a number of new programmes that have not recruited sustainable student numbers;
2. The documentary requirements of the current process can be onerous and often involve duplication of information;
3. The timing of approval events - a number of schools noted their frustration at being unable to market programmes and offer places to potential students until the approval process is fully complete.

The baseline evidence report also identified a number of issues that have been arranged around the four quadrants in the project's scope diagram. The key points from this and the lessons learned are summarised below.

1. Business Case/Portfolio Planning

- That the current process places little emphasis on the viability of new programmes;
- That estimates for likely recruitment to new programmes are often made on the basis of an optimistic guess;
- That improving business case planning will require dedicated resource to be made available and clear lines of responsibility to be developed.

These issues will be considered through i) discussion of the baseline report by ASQC in October 2009, ii) consideration of the future size and shape of the University at the University Board in December 2009. The outcomes from the PALET Baseline Report regarding Portfolio Planning will be fed into this discussion; and iii) the redesign of the approval process through implementation of workpackages 3 and 4.

2. Curriculum / Programme Design

- That most staff focus first on curriculum content (rather than learning outcomes) when

designing new programmes;

- That little attention is paid to issues such as inclusivity and sustainability by staff designing new programmes;
- That changing the ways in which the process operates will necessitate changes in culture, roles and responsibilities.

These issues will be considered through i) discussion of the baseline report by ASQC in October 2009, ii) the redesign of the approval process through implementation of workpackages 3 and 4, and iii) through work to be undertaken in 2010/11 to review and refresh the University's learning and teaching strategies.

3. Documentation / Programme Information

- That the current approval process entails some duplication in information;
- That staff find it easier to engage with templates that they have helped design;
- That there is a strong wish to be able to re-use and re-purpose information produced for validation to support a programme's operation.

These issues will be considered through i) discussion of the baseline report and redesigned templates by ASQC in October 2009, ii) the redesign of the approval process through implementation of workpackages 3 and 4, and iii) through further work to a) improve the design of the relevant forms and templates, and b) discuss with students ways of accessing and delivering programme information.

4. Approval Procedure / Quality Processes

- That the current new programme approval process can be very lengthy;
- That better links need to be made within the institutional suite of assurance / enhancement processes;
- That better links need to be made with related operational processes.

These issues will be considered through i) discussion of the baseline report by ASQC in October 2009, ii) the redesign of the approval process through implementation of workpackages 3 and 4, and iii) ongoing work in Cardiff University's Registry to a) eliminate the current duplication of effort and data, and b) coordinate activities which contribute to the enhancement of the student learning experience.

Over the last twelve months the PALET Project team has become more and more convinced of the need for wide stakeholder involvement in institution-wide change projects. In ensuring this, the benefits, opportunities and pitfalls of stakeholder involvement have also begun to emerge. While it has proved difficult to arrange events that all of the relevant groups can attend, the engagement with the Project by different stakeholder groups has helped give it a presence and level of support that would not otherwise have been possible.

The PALET Project has used video and audio footage to support the baseline evidence report via an online, multimedia map of the process. We found the footage valuable in capturing the 'human' aspects of curriculum design and the programme approval process. It has also been useful in communicating the outcomes of the baseline evidence review to colleagues. The Project has also found, however, that great care needs to be taken to explain to participants how such footage will be used. For example, the project team did not consider how the audio or video clips would be hosted. It then proved necessary to host the clips on YouTube. Two people were uncomfortable with being featured in video hosted via such a public forum and so the clips were withdrawn. We hope to use video further during the PALET project and are investigating with Information Services, the possibility of hosting video clips locally on a Cardiff University server.

Section Five: Communications and Dissemination Activities

The project team has been involved with a number of activities and events as part of the PALET communications plan. These include:

- E for Enhancement Conference (2 April 2009) - poster presentation [see http://admin.rsc-wales.ac.uk/file_security/get_file.aspx?id=1025];
- August 2009: Visit to Aberystwyth University;
- Association for Learning Technology Conference 2009 (7-10 September) – Running a symposium session with Design Cluster B, ‘Herding Cats? Engaging stakeholders in complex institutional change projects’ [<http://altc2009.alt.ac.uk/talks/show/6782>], and a symposium session with the JISC, ‘Curriculum Challenges – Big words that make us so unhappy’ [<http://altc2009.alt.ac.uk/talks/show/6835>].
- October 2009: Visit from staff at Glamorgan University interested in PALET;
- May 2010: Due to present on ‘Communities of Learning; at the SEDA Conference on with Design Cluster B.

The project has received positive feedback from the JISC Learning and Teaching Experts Forum and the Welsh Academic Development Quality Group (WADQC), and has disseminated information through Cardiff University’s Learning and Teaching Bulletin [<http://www.cardiff.ac.uk/learning/bulletin/index.html>]. The PALET blog feed now has on average 40 hits per day. We are also finding Twitter a very useful way to inform people of new blog entries and to update people on the day to day progress of the project.

Section Six: Evaluation

The project has adopted an ongoing approach to evaluation, using a reflective approach across the whole project team that is designed to secure continuous improvement. A thorough evaluation of progress with the first two workpackages (Planning and Preliminary Work and Review of Current Processes and Practice) has been undertaken. Professor Peter Chatterton (PALET External Evaluator) produced an interim evaluation report which reviewed the completion of the workpackages in the context of the Evaluation Strategy, reviewed the baseline data report, summarised the key learning points and provided feedback and recommendations to enhance the project. The report was written following a series of interviews/focus groups with a range of project stakeholders within the institution.

We have found it extremely useful to have an evaluator who is external to the day to day operation of the project. The stakeholders that were interviewed felt able to discuss their views on project progress openly with Peter due to his externality. The interim evaluation report was discussed at the Project Management Team meeting and found to be a constructive document that highlighted the key areas to be addressed during the next phase of the project.

Section Seven: Issues and Challenges

Having recognised the need for stakeholder involvement with the project, a variety of methods have been used to encourage different stakeholder groups to engage with the project. Some of these have been more successful than others, a re-occurring issue being the range of different calls that are placed on stakeholders, which can make it difficult for people to find the time to become involved. Running sessions on more than one occasion, and arranging one-to-one interviews have helped secure a good level of engagement, which the project team aims to maintain. The project team have used a variety of methods to engage stakeholders during the first two project workpackages, which include:

- Formal/informal meetings, interviews, workshops (a nice lunch always helps!);
- Video, which we found to be an excellent way of communicating research outputs to senior management – to allow them to hear for themselves that these opinions really do come from academic colleagues;
- It was recognised from an early stage that Senior Institutional support is crucial to the success of a large institutional change project such as PALET. We have found it useful to have the Pro-Vice Chancellor for Education and Students chair the PALET Steering Group

Institutional Approaches to Curriculum Design Programme

meetings;

- The PALET project has adopted a participatory design approach and has emphasized throughout the wish to have the stakeholders actually doing the work, driving and owning the change;
- The baseline review was undertaken by the Project Officer who was new to Cardiff University and had no prior experience of the Programme Approval Process. It was very useful to have someone with 'no baggage' managing the review as it gave staff confidence that this really was an independent review;

Key challenges for the project in the next planning period include:

- How should the new procedure balance the need to have a common institutional process with one that meets the diverse needs of different schools?
- How can we ensure that the new process does not require greater effort from different stakeholder groups, and actually reduces the length of time it takes a new programme to be approved?
- How should the new procedure fully capture all of the discussions and decisions that take place when new programmes and their curricula are designed? How can 'form-filling' be avoided?
- How can we ensure that the documents produced for validation are re-used and re-purposed as necessary to support a programme's operation?
- How radical should the new procedure be, or might it be appropriate for this to be a minor modification of the existing arrangements?

Section Eight: Collaboration and Support

The programme manager and the support team for the Curriculum Design and Delivery projects have been enthusiastic about project progress and are always willing to provide support and advice in any way that they can. JISC InfoNet ran a one-day workshop on Project Management for Cardiff University staff and a Change Management session at a Cluster Group meeting. The Project Officer has attended several Elluminate Sessions, for instance those run by TechDis on Equality and Diversity. The Elluminate tool was an excellent way to meet and collaborate and we would be pleased to attend future programme sessions via this media.

The PALET team has found the process of working with a cluster group (Design Cluster B) and the appointed Critical Friend invaluable. The group works well together and has formed a true community of practice/community of learning. The face to face CAMEL meetings are useful to share with each other, openly and honestly how our projects are progressing and support each other through any challenges or issues that have arisen. We are in regular contact with the JISC Critical Friend, who has attended two Project Steering Group meetings.

So far, the PALET team have found that the JISC run programme meetings provide a useful opportunity to explore similarities and synergies with all other projects under the programme. Individual project presentations may not be the best use of time, as each project has a website and blog which contains project specific details. Perhaps it would be more valuable to receive presentations from each Cluster Group about progress on a theme that they have been working on (i.e. Design Cluster B – Stakeholder Engagement).

Section Nine: Financial Statement

Total Grant	£389,063	Duration of project	3 years 8 months
Reporting Period	October 2008 – September 2009		

Institutional Approaches to Curriculum Design Programme

Budget Headings	Total budget allocated	Expenditure this reporting period	Total expenditure to date	Further information
Total	£389,063	£60,879	£60,879	

Checklist:

Before you return this report:

- Ensure that your project webpage on the JISC site is up to date and contains the correct information. Attach details of any required amendments to this report. Project webpages can be found from: www.jisc.ac.uk/curriculumdesign
- If there have been any changes to the original project plan and/or work packages, ensure that amended copies of the relevant sections of your project plan are attached to this report.
- Identify and name any areas within this report that you'd like removed before the report is made public (see below)

***Please note** the interim reports will be made available on the JISC website and on the Circle site with the budgetary information removed. We recognise that projects may occasionally address very sensitive issues. We would like you to present as full a picture in this report as you can as the lessons you learn are valuable to us. We assure you that any issues you identify as confidential are removed before the report is made public. Where such issues do represent valuable lessons for the community we will involve you in further discussion as to how they could be passed on without identifying institutions or individuals.



Institutional Approaches to Curriculum Design Programme

Guidance tool on mapping outputs

What kinds of outputs do you expect your project to produce?

Type of output (see indicative list below)	Details e.g. theme, topic, number (of this type), size/scope	Proposed audience (internal or external) and who will use this output and why?
Final Report	A final report will be submitted according to JISC deadlines. The final report will reflect upon the success of PALET in achieving the initial aims and objectives of the project. The report will reflect upon the project deliverables and also discuss the implications for the future.	The final report will predominantly be of interest to an external audience, particularly those who wish to undertake a similar change in their institution. The reflective report will be used to gain an understanding of the approach adopted by PALET, the challenges faced and how they were overcome and a summary of project deliverables that may be of interest.
Case Studies	Case studies or descriptive scenarios will be developed, to represent the learning journeys that staff have experienced. From an early stage, staff involved in the project will be encouraged to keep a log of their experiences/reflections. The case studies are likely to include both written records and video clips of experiences and will represent a range of different perspectives from those involved in the curriculum approval process.	The case studies will be relevant to both an internal and external audience. Cardiff University staff may find the case studies useful, if they are facing a similar scenario. Similarly, the case studies may also be of value to staff in other institutions who are interested in redesigning the programme approval procedures.
Guidance Material	The project will produce guidance materials that will be written to support a range of roles involved in the processes, such as academic staff, administrators, heads of schools, and registry staff etc.	The guidance materials will be of interest to other institutions that may wish to adopt or adapt the Lean approach to Curriculum Design that Cardiff University takes.
Training Material	The project will produce a training manual to disseminate information about the improved business process and the electronic toolset.	The training manual and documentation will predominantly be of interest to the Academic Schools at Cardiff University that were not involved in the pilot phase. This will help ensure that the process becomes embedded properly within the University.

Project Website and Blog	A website and blog will be established to raise awareness of the project and keep interested stakeholders aware of progress and future plans.	The website and blog will be of interest to both internal and external audience. The blog will be of particular interest to those who are interested in keeping up to date with the day-to-day progress of the project.
Videos and Audio Clips	A range of video and audio footage will be captured throughout the life of the project. A series of clips are already being used to support the PALET Baseline Evidence Report . Video clips will be used for project dissemination purposes and will be linked to the blog/website.	It is likely that the video and audio clips produced during the project will be embedded in various webpages/reports. Therefore, the audience of the clips is dependent on the purpose of the page/document into which it is embedded.
Sample Documentation	It is anticipated that a range of sample documentation will be produced as a project output. This will include a revised programme specification template and module description template, with examples of how this might be completed.	The templates and sample responses that will be produced as a project output will be of interest to those at Cardiff University who are required to complete the documentation as part of their role. The documentation will also be of interest to those outside of Cardiff University who are interested in reviewing their templates and documents.
Data – qualitative and quantitative	A range of data has been collected as part of the PALET Baseline Review, including; a summary of the changes that arise at programme approval meetings, analysis of the timeframes involved in programme approval, cost analysis. The data collected has been used to inform the Baseline Evidence Report.	It is not expected that the raw data collected will be of interest to any audience apart from the PALET project team. The evidence summarised in the baseline report will be of greater interest to both an internal and external audience.
Electronic Toolkit	As a key aim of the project, an electronic toolkit will be produced using the tools emerging from Cardiff University's Modern Working Environment (MWE) project. The toolkit will support the redesigned programme approval process and encourage a more collaborative approach to curriculum design and development.	Cardiff University staff will be the users of the electronic toolkit. However, it may be of interest to other institutions who are investigating using similar tools to support the programme approval process.