



Project Information			
Project Acronym	PALET		
Project Title	Programme Approval Lean Electronic Toolset		
Start Date	October 2008	End Date	July 2012
Lead Institution	Cardiff University		
Project Sponsor	Professor Jonathan Osmond (Pro-Vice Chancellor, Education and Students)		
Project Manager & contact details	Stephen Iwan Griffiths Tel: 02920 74456 Email: GriffithsS4@cardiff.ac.uk		
Partner Institutions	N/A		
Project Web URL	http://www.jisc.ac.uk/whatwedo/programmes/elearning/curriculumdesign/palet.aspx http://palet.cf.ac.uk/		
Programme Name (and number)	<i>JISC Curriculum Design Programme 04/08</i>		
Programme Manager	Sarah Knight		
Document Name			
Document Title	Interim Report – October 2010		
Reporting Period	April 2010 – October 2010		
Author(s) & project role	Stephen Iwan Griffiths (Project Manager) Georgia Slade (Project Officer) Simon Bleasdale (Technical Lead)		
Date		Filename	
URL	<i>if document is posted on project web site</i>		
Access	<input checked="" type="checkbox"/> Project and JISC internal		<input checked="" type="checkbox"/> General dissemination
Document History			
Version	Date	Comments	
1		First Draft – Georgia Slade	
2	10/11/10	Amended – Georgia Slade and Stephen Iwan Griffiths	
3	10/11/10	Amended by Georgia Slade and Stephen Iwan Griffiths following comments from Jill Bedford and Rhodri Evans	

Interim Reporting Template

Project Name: *Programme Approval Lean Electronic Toolset (PALET)*

Report compiled by: *Georgia Slade, Project Officer*

With contributions from: *Stephen Iwan Griffiths, Project Manager and Simon Bleasdale, Technical Lead*

Reporting period: *May 2010 – end of October 2010*

Section One: Summary

Since the last report the project has undergone a number of key changes, including changes to scope, management and governance. The main focus of the PALET project was originally around the development and approval of **new** provision for the University. This report describes how the scope of the project has changed and the rationale, benefits and implications of these decisions. The interim report also details changes in the project management, reported under section two.

Alongside managing and adjusting to the changes and challenges that have presented themselves over the summer, the project team have also been working on developing the detail of the approval mechanisms for programme developments and have started to develop key quality principles that will help to inform the quality system as a whole. The more holistic approach to Programme Management was endorsed by the Academic Standards and Quality Committee (ASQC) at its meeting on 13 October 2010.

Section Two: Activities and Progress

Background

As described in previous interim reports, between February and August 2009, a Lean Review of the Programme Approval Process at Cardiff University was undertaken. A number of workshops and interviews were held, with staff attending from almost all Schools across the University and relevant Directorates. The outcome was a [baseline report](#), which highlighted the following as key areas for improvement;

- Duplication of programme information;
- The length of time the process takes;
- Business Planning;
- Meaningful communication with Directorates;

Following the baseline review, a number of Lean Workshops were held across the University, and a High Level, Aspirational Programme Approval Process was developed, endorsed by the Academic Strategy and Quality Committee (ASQC) in January 2010.

Progress

Since ASQC endorsed the Aspirational State process in January 2010, there have been several key project developments, which are summarised below.

Programme Management:

The original focus of the PALET project was to concentrate solely on the approval of entirely new programmes. Earlier this year it was agreed that in order to achieve maximum impact and benefit for the University, the scope of the project should be extended to include the development of new programmes, changes to existing programmes and the ongoing, yearly management of programme and module information. The project will work to ensure that programmes and modules can both be developed and maintained by the Schools, in a single, electronic system. The Programme Management package will offer approval mechanisms for all academic provision, from entirely new programmes to the annual maintenance of modules. The tools for Programme Management will be

Institutional Approaches to Curriculum Design Programme

developed holistically and presented as a complete package of tasks to Schools. In order to ensure that the aims and objectives of the extended project can be realised, the PALET project has been aligned with the Student Information Management System project and teams have been working towards common goals.

At its meeting in October 2010, ASQC endorsed the proposal for a more holistic approach to programme management. The committee endorsed the approach to programme management based on a single source of programme information, the principle of a template for a standard institutional Student Handbook used as the basis for approval, and the need for a business case to enable portfolio planning and ensure adequate resources are in place. The project will now work towards enabling:

- Students to receive **personalised** information about their programmes in a **standardised** format, generated from a single data source held within SITS;
- Schools to capture and manage programme and module data in a **simple** and **logical** way;
- **Consistent** and **transparent** communication of programme information to students and applicants;

The principles have been used to inform the design of approval mechanisms for both new programme developments, changes to existing programmes and the ongoing maintenance of programme and modules. Technical development has begun and it is anticipated that by January 2011, Schools will be provided with an electronic facility to capture module level information, including learning outcomes, assessment details and reading lists. It is the intention that the data captured and stored in SITS will be the 'source of truth' for programme and module data. Future developments will facilitate module information to be automatically reported into online, student-focussed module specifications.

Approval Process for Programme Developments

The project team have also been working to develop the detail of the approval process for a new programme development. This has been taken forward in the context of the remaining time and resource allocated to the Project and the wider University discussions regarding Business and Portfolio Planning and Programme Information. The team conducted a full critique of the current process linked to the findings of the baseline review, in order that positive aspects of the way things are currently done are recognised and captured in the detail of the New Process. A further round of process mapping resulted in the development of a 'Future State' Programme Approval Process. The 'Future State' Process represents a positive step towards the High Level Aspirational map and is well aligned with University initiatives in other areas, for example the SITS Project and discussion taking place in the areas of business planning and portfolio planning.

The project team will continue to engage with stakeholders across the University to ensure that the processes, tools and technology that are being developed match user requirements and are genuinely useful and meaningful. Engaging stakeholders will become increasingly important to the project as the development of technical tools and processes gains momentum. The project will work with users to test and pilot the technical developments to ensure that they are fit for purpose and as intuitive as possible. It is hoped that the formation of the PALET Reference, Advisory and Piloting Community (see section on Project Governance Structures below) will enable the project to engage more deeply with a much broader range of stakeholders.

Project Manager

Since the last report, there have been key changes to the Management of the PALET Project. In April 2010, Andy Lloyd (original Project Manager) took on a new role at Cardiff University, managing a cross-institutional Project concerned with Assessment Matters. David Lloyd (Head of the Academic Policy Section) assumed responsibility for managing the project from April 2010, overseeing the project in order to meet the key project milestone of the October ASQC meeting.

After reaching the milestone in October, Stephen Iwan Griffiths (Head of Quality Assurance and Enhancement) was appointed permanent Project Manager for PALET. Stephen has an in-depth understanding of the scope, issues and challenges being addressed by PALET, gained through his contribution to the preparation of the original bid, membership on the project management team and input to the Lean review during year one of the project. This year, Stephen has played a significant and enhanced role in the project and has been heavily involved in managing the linkages of PALET

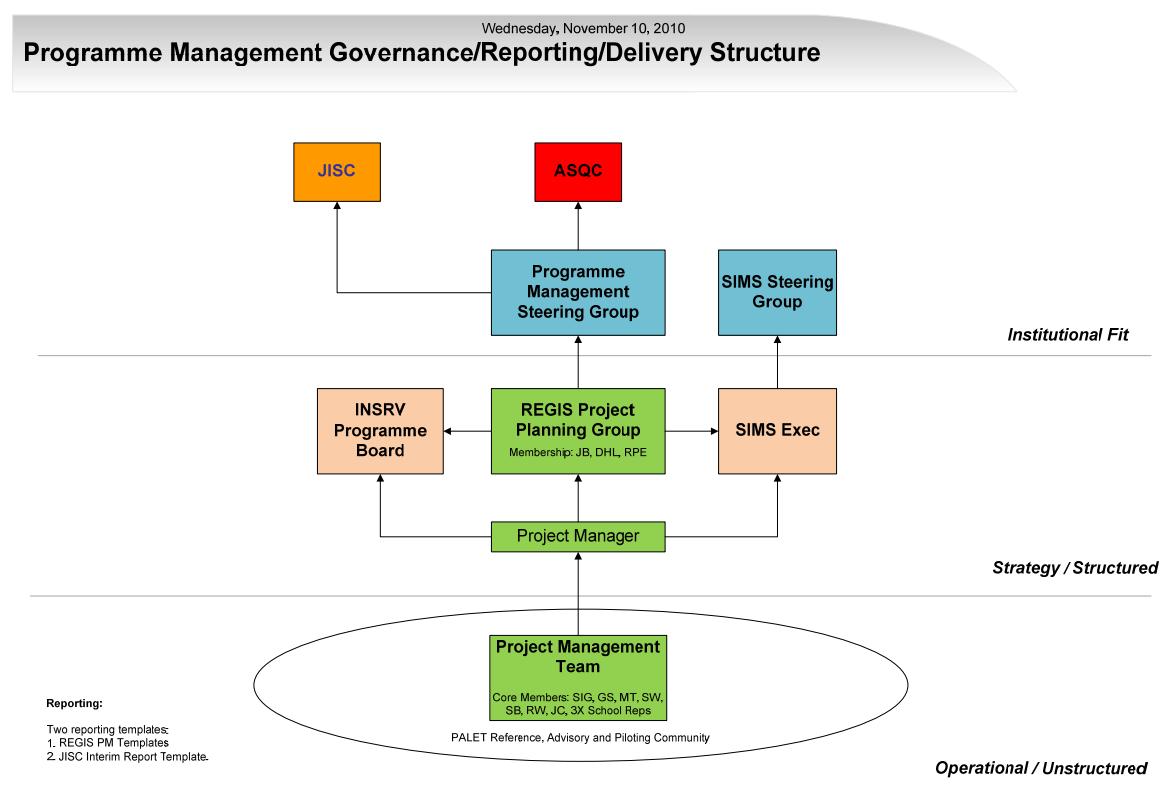
Institutional Approaches to Curriculum Design Programme

with other, major University initiatives and driving forward project progress at both a senior and operational level. Stephen has been enabled to dedicate a significant proportion of his time to manage the PALET project and to fully participate in programme level events and dissemination activities.

Andy remains within Registry overseeing a key project on assessment and feedback (Assessment Matters) and will continue to be available to contribute to the project when required to ensure that the knowledge and experience gained through working on the project is captured, and to ensure that both projects are aligned appropriately to maximise mutual benefits for the institution. The remainder of the core project team remains unchanged, which will help to ensure a consistent approach to the management and delivery of the PALET Project.

Project Governance Structures

The project is in the process of moving carefully into a phase largely focussed on the delivery of technical solutions to support the processes that have been designed and the user requirements that have been defined. To reflect this change, the structures put in place to govern the project have been revised to better support project delivery.



The core Project Management Team members (those responsible for delivering the project and three School representatives) will meet as appropriate and necessary to oversee the day-to-day progress of the project. More formal meetings of the Project Management Team including a wider group of representatives drawn from the PALET Reference, Advisory and Piloting Community (stakeholders drawn from those involved with the project as it has evolved and new ones including those deeply engaged with all aspects of programme management and developments in academic schools) will be organised every four months to consider more substantial project developments and key documents. In the interim, the Project Management Team will approach this group with ideas, questions and challenges and use them to gain feedback and pilot and test project outputs. This group will be formally engaged using social networking tools, but it is hoped that it will expand (to include student representation) and gain momentum over time through a process of 'associative engagement', as the project engages a wider range of stakeholders across the institution.

The Project Management Team will be led by the Project Manager (Stephen Iwan Griffiths) who will feed into the Registry Project Planning Group. A progress report on a standard template will be

Institutional Approaches to Curriculum Design Programme

submitted to the Registry group on a regular basis, to allow them to monitor project progress against key milestones, ensure that risks are being managed appropriately, monitor project resources and plan for project sustainability. The Registry Project Planning Group has recently been set up in order to manage the growing number of projects being run across the Division.

Reports approved by the REGIS Project Planning Group will be submitted by the Project Manager to the INSRV Programme Board and the SITS Executive Group, to update on progress and highlight resources that will be required for future stages of the project. The SITS Steering Group will be informed of progress bi-annually upon receipt of the minutes of meetings of the SITS Executive. The PALET Steering Group (renamed Programme Management Steering Group) will continue to operate and will formally meet according to key project milestones.

Technical Developments

In order to support the processes developed by PALET, a suite of electronic Programme Management tools and tasks will be surfaced in the MWE portal, via a custom written Programme Management portlet hosted by IBM WebSphere Portal. The portlet will contain tasks that will allow the user to develop programme and module information, go through an academic validation process, produce electronic reports, collaborate and develop ideas in an online environment and draw upon a knowledgebase of resources, including case studies, examples and vignettes.

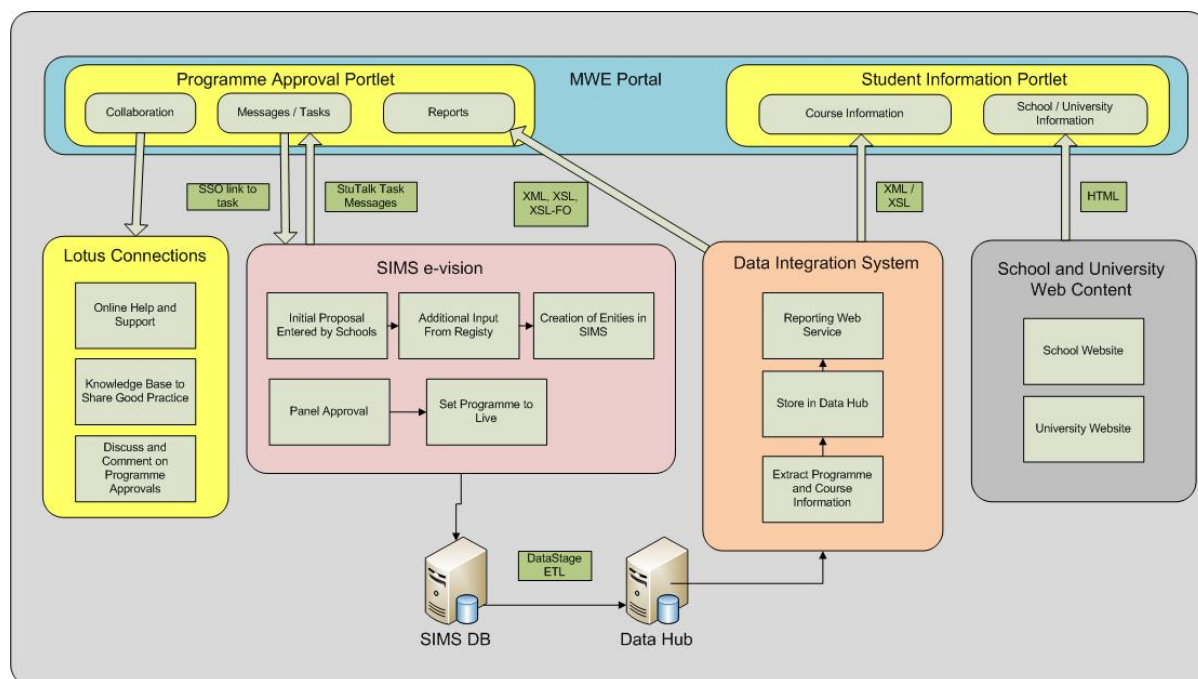
StuTalk: The portlet will connect to SITS using a web service called StuTalk. The portlet will have a single sign on facility, so the user will be signed directly into the task they need in SITS e-vision, without having to log in to a different system.

Reporting: In order to achieve the best and most consistent user experience throughout the whole process, the reporting of programme information from the SITS database will be managed via the MWE Data Mart. A DataStage job will be used to synchronously extract transform and load data from SITS to the data hub. This information would then be accessed by a web service which would deliver the data for the required programme in XML. XSL (XML Stylesheet Language) would be used to format and style the information into a formatted report within a web browser. Links to these reports could be presented to staff approving the programme in the portal alongside their Intranet. The same web service will be able to be called by a student facing portlet to show them information relating to their programme.

Collaboration Software: In order to facilitate a collaborative approach to programme design, it is proposed that users will use Lotus Connections to discuss and share ideas. It is also hoped that this software will be used as a knowledgebase to share good practice and resources. A set of previously/frequently asked questions and answers will be available for other programme designers to refer to as they embark upon their design. It is hoped that as more users engage, this will grow organically into a 'knowledgebase' of information, advice and experience. Use of the Connections API could allow users to interact with this tool at the same time as inputting data into SITS.

The following diagram illustrates the scope of the solution being delivered by the project in terms of functions, systems and primary data flows. Please note that the student information portlet is outside the scope of PALET but is included in this diagram to demonstrate the final destination of the data.

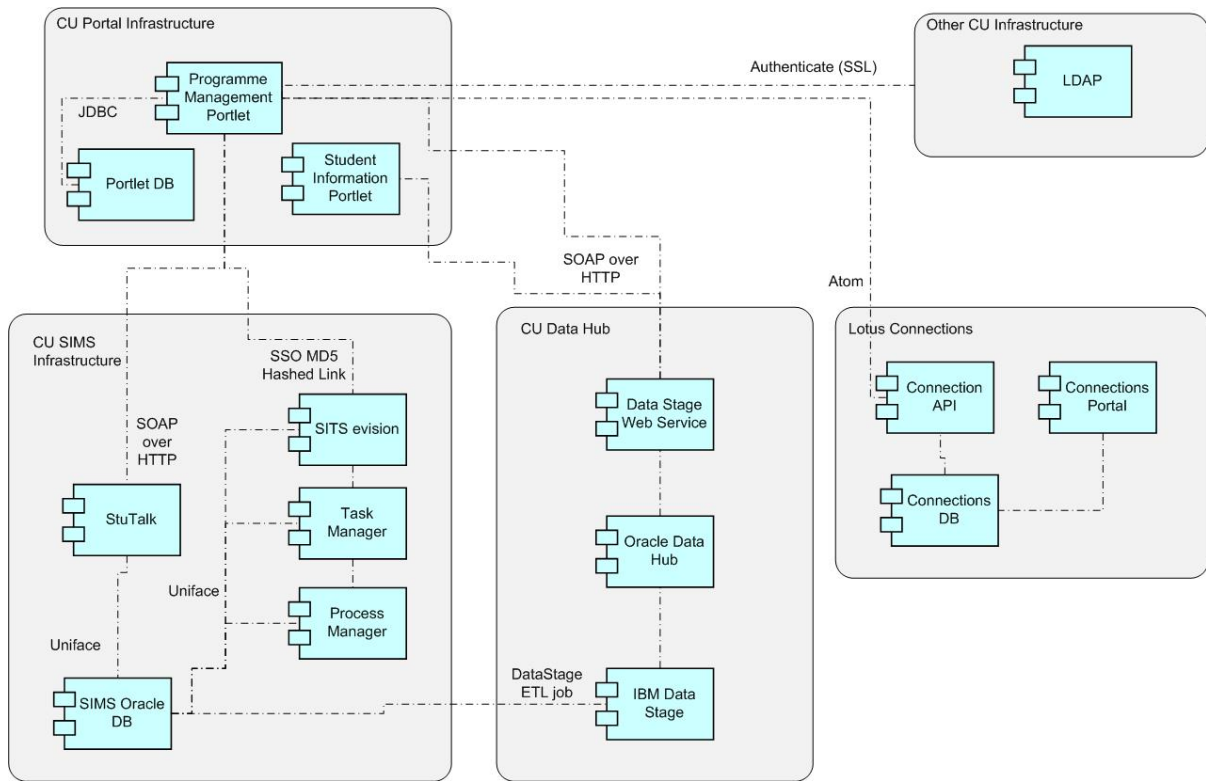
Institutional Approaches to Curriculum Design Programme



Service Introduction: It is envisaged that the introduction of the new workflow and toolset will be managed in accordance with the appropriate INSRV service introduction framework. This is likely to involve the completion of Service Level Objectives, Operational Level Agreement and Release Acceptance Checklist prior to the deployment to the Production environment. The agreements are being considered now, to ensure that the workflow and toolset can be supported and sustained when the JISC project ends, as appropriate.

System Architecture: The following diagram illustrates the systems and interfaces required to provide the solution. Further details will be made available in the Technical Specification which will be published following approval by the I.T. Programme Board, which manages the technical resource allocated to the project.

Institutional Approaches to Curriculum Design Programme



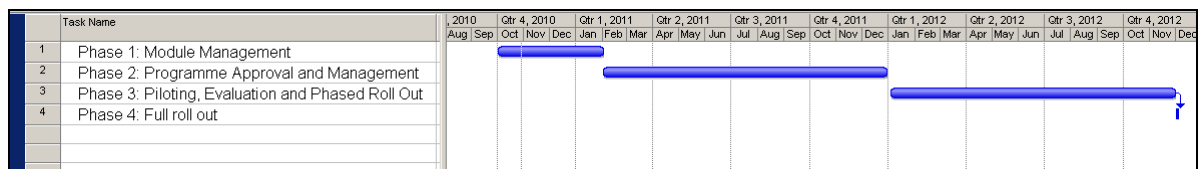
Section Three: Risks, Issues and Opportunities

Scope Creep

The last interim report identified ‘scope creep’ as a live risk for the project. As described under section two, decisions have been taken to extend the scope of the project to provide Schools with the means to manage all aspects of programmes, rather than focusing purely on the approval of new programmes. The implications of this decision with regard to project timescales and the resources required for delivery have been considered and are detailed below:

Resource: The project has aligned much more closely with a number of key institutional initiatives and projects. This will allow resource to be shared between projects that are working in similar areas and avoid any potential duplication of effort. The PALET Motherboard has been produced, to visually represent some of the initiatives with which the project has aligned. This can be found in the Design Studio at the following link: <https://jiscdesignstudio.pbworks.com/The-PALET-Motherboard>

Timescales: The changes to the scope of the project have impacted upon project timescales, illustrated in the image below.



Reliance on other University initiatives

Since the last report, the project has worked to ensure that the appropriate linkages are formed with other institutional projects on which PALET may impact upon or may be affected by. These projects include the SITS Project, the Assessment Matters project, the Student Space project and elements of the MWE Project, for example. For the PALET project to deliver and achieve maximum impact it is reliant on the successful and timely delivery of other projects – this has become a live risk. The risk is being managed by the revised governance structures, which will enable more regular communication

Institutional Approaches to Curriculum Design Programme

between different projects. As described under Section Two, a Registry Project Management Group has been established, into which all Registry run projects will report. This will enable links to be made between Registry run projects and communicate any changes to project timescales or scope.

Student Engagement

When PALET was first conceived, students were not listed as key project stakeholders. As the project has progressed and the concept of a standard institutional student handbook has become a key area of work for the project, the views of students have become increasingly relevant. To date, the project has made use of existing data sources collected for other purposes, for example University surveys and reports from institutional quality audits. The PALET motherboard (link above) demonstrates the range of links that the project has made with other projects and initiatives. Working with the Student Space project presents one key opportunity for the project to more actively engage with students. We will also work as indicated above to include student representation in the PALET Reference, Advisory and Piloting Community.

Curriculum Design

The last interim report highlighted that further work was required to determine how the project will support the preliminary stages of curriculum design. In their feedback, JISC suggested that the project investigate the progress being made by other projects under the programme and consider the adoption of the tools and approaches that they have developed. At our last CAMEL meeting it was evident that the other projects in CAMEL Cluster B were also keen to find out more about the tools and approaches being developed across the programme. A meeting between Cluster B and Cluster C is being arranged for Easter 2011, which will provide a valuable opportunity to demonstrate approaches, share experiences and investigate the potential for the tools to be piloted in other institutions.

Section Four: Outputs and Deliverables

List of Project Outputs:

Student-facing Programme Information Templates

PALET contributed to the design of a set of student-facing programme information templates during year 2 of the project. Data will be collected during the programme management/approval processes in order to populate the student-facing documents. The project has made links with other University initiatives that seek to deliver targeted module and programme information to students via a Student Portal.

PALET Process Maps

Further process maps have been developed by the PALET project, defining a further level of detail to the programme approval process and defining the processes for the management of modules and programmes on an ongoing basis. The process maps will be shared in the Design Studio as assets over the coming year.

Standard Institutional Student Handbook

The project team are working to develop a standard institutional student handbook, which will act as the main document for validation in the new programme approval process.

Business Planning Template and Guidance

The team are working to develop templates and guidance as a project output, to support staff undertaking business planning for a programme development.

Summary of Technical Outputs/System Integrations

A full summary of the proposed systems integration can be found in the draft technical specification, which will be published on the project website when finalised.

Design Studio

Several project 'assets' have been uploaded to the Design Studio to date. Shortly, the team will be revising the project page in the Design Studio and hope to add a number of other project assets as the project progresses.

Institutional Approaches to Curriculum Design Programme

It was useful to hear from two of the Curriculum Delivery projects at the Programme Meeting, describing how they have used the Design Studio to engage Senior Management and using it as a way of ensuring that the presence of the project and the resources and tools that have been developed remain visible, accessible to the wider community and are sustained.

Section Five: Evaluation

There is a need to revisit the original evaluation plan, to reflect the recent changes made to project scope. It is anticipated that additional measures will be added to the plan, as the project progresses into its next stages. Once the evaluation plan has been updated, it will be published on the PALET website.

Section Six: Outcomes and Lessons Learned

Lessons Learnt: From 'Scope Creep' to 'Scope Management'

The PALET project set out with a focussed scope, concentrating on the approval processes for new programme developments. The project has always been cognisant of potential scope creep, and has worked to actively monitor and manage this. Earlier this year, an agreement was reached to use SITS process manager to support the formal programme approval processes developed as part of the PALET project. Soon after this, it was agreed that the PALET and SITS projects should work together towards the common, overarching objective of developing a holistic Programme Management Toolkit. It had become apparent that the potential gains of increasing the scope of the project significantly outweighed the risks. Aligning the PALET and the SITS projects has enabled resources to be pooled, in order to ensure the delivery of an outcome that is of greater benefit and value to the institution.

The project has learnt that it is important to carefully monitor and manage the scope of a project that crosses into a range of domains of the University. To ensure that sensible and practical decisions are reached, projects should explicitly demonstrate the full range of potential benefits, risks and impact that a change in scope may have to all stakeholders.

Project Identity / Project Branding

PALET was launched internally at Cardiff University as a stand-alone project with a specific brand, logo and identity. A project website was launched and stakeholders began to engage with PALET project staff. It seems that other projects funded under the programme have taken a more "submarine" approach to internal communications, choosing not to identify the project explicitly as a stand-alone activity. Members of these project teams have integrated the work of the project into their existing portfolio of work, making best use of relationships and links already established across the institution.

With hindsight, PALET may have benefitted from adopting the "submarine" approach. This may have allowed for more flexibility in scope, a better-connected and larger project team and easier links into other university initiatives.

Section Seven: Communication and Dissemination Activities

The project has been involved with a number of activities and events, in order to disseminate project progress and achievements;

The project has continued to use the project blog to communicate with internal stakeholders across the institution and interested parties in the wider community. To date, the blog has been used rather infrequently, primarily to report upon participation at events and conferences and to on key project achievements. As the projects moves forward, it is hoped that the blog will be used more frequently, by more members of the team and as a tool for ongoing reflection.

Institutional Approaches to Curriculum Design Programme

The project has presented at a number of events and conferences, outlined below;

Association for Learning Technology Conference 2010: Poster Presentation made by Design Cluster B – Technology based solutions for enhanced Curriculum Design in Higher Education: A journey of involvement, influence and change.

JISC Programme Meeting – October 2010: Design Cluster B presented on 'Students as Agents of Change'. This session explored the different approaches that the institutions in Curriculum Design Cluster B have used to engage students in their projects, ranging between using student data gathered via annual surveys, world café events and employing students as academic partners to undertake research and curriculum design.

JISC Learning and Teaching Experts Group – October 2010: Design Cluster B presented on '*Institutional Reactions to Curriculum Change*';

Abstract: The JISC funded Institutional Approaches to Curriculum Design programme is at the half way point. This session will review the range of institutional reactions experienced by the projects in Design Cluster B to their change initiatives so far and describe ways in which these are being handled. This will be workshop-style session. After a short introduction delegates will work in groups, each with a Design Cluster B facilitator, to understand for their own organisations the implications of some of the challenges and coping strategies described.

Section Eight: Collaboration and Support

Programme Engagement and Support

The project team were pleased to welcome Sarah Knight (Programme Manager), Professor Stephen Brown (Critical Friend) and Dr Gill Ferrell (Programme Support Team) to Cardiff in August this year. This was an opportunity to discuss and reflect upon a range of areas, including the emerging scope of the project, the change in Project Management and detailed feedback on the April 2010 interim report. The support of Professor Stephen Brown as Critical Friend has continued to be of value to the project.

Georgia Slade (Project Officer) and Dr Sarah Williamson (Head of Learning and Teaching Support) attended the JISC Programme meeting in October 2010. The meeting was a good opportunity to catch up with the progress across the programme and identify potential areas for collaboration between projects. The networking time was a welcome slot on the agenda, during which Design Cluster B met with Design Cluster C to discuss and plan a joint CAMEL meeting to be held Easter 2011.

CAMEL Collaboration

Design Cluster B enjoyed a successful CAMEL Cluster meeting in October this year, hosted by Birmingham City University. CAMEL meetings remain an excellent opportunity to share progress and ideas with each other in an environment built upon trust, support and honesty. The meetings also provide an opportunity to discuss and plan and collaborative on cluster level outputs.

Section Nine: Financial Statement

Total Grant	389,063	Duration of project	3 years, 8 months
Reporting Period	November 2009 – April 2010		

Budget Headings	Total budget allocated	Expenditure this reporting period	Total expenditure to date	Further information
Staff	323,740	47,524	149,400	
Travel & Subsistence	10,000	1,057	6,775	
Equipment	7,000	0	6,432	
Dissemination activities	10,000	529	2,069	
Evaluation activities	20,918	0	10,150	
Technical Development	17,405	10,000	10,000	

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.