



Project Document Cover Sheet

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	Prof. Jonathan Osmond (Pro-Vice Chancellor, Education & Students); Prof. Stephen Denyer (Deputy Pro-Vice Chancellor, Education & Students)		
Project Manager & contact details	Stephen Griffiths Tel: 02920 874456 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 – April 2011		
Reporting Period	November 2010 – April 2011		
Author(s) & project role	Stephen Griffiths (Project Manager) Georgia Slade (Project Officer) Simon Bleasdale (Technical Lead)		
Date	11/04/2011	Filename	JISC Interim Report April 2011
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	11-04-11	First Draft, Georgia Slade	
2	18-04-11	Amended, Stephen Griffiths	

Project Name: Programme Approval Lean Electronic Toolset (PALET)

Report compiled by: Stephen Griffiths (Project Manager)

With contributions from: Georgia Slade (Project Officer) and Simon Bleasdale (Technical Lead)

Reporting period: November 2010 – end of April 2011

Section One: Summary

Since the last report, the PALET project has made progress towards fulfilling each of the core project aims and objectives. As indicated in the October 2010 interim report, the scope of the project has been broadened from looking at processes to support new programme approval, to develop a more holistic programme approval and management system. As a result of this, there has been a strong emphasis on solidifying a principled approach to the development of the underlying administrative processes and associated technical developments.

The project has focussed on building a sound and stable infrastructure upon which the technical development of systems to support the processes specified by the project will be built. Ensuring that a stable framework is in place will allow the project to focus on the irreducible core of the project - enhancing curriculum design.

The project has also been working to support Academic Schools to engage with module management processes. These have enabled schools to manage their modules in an online system. This is positive step towards streamlining programme and module information across the institution and developing a recognised, single source for this data.

This report provides an outline of project activities, stakeholder engagement and technical developments that have taken place in across all areas of the PALET project.

Section Two: Activities and Progress

The discussion of activities and progress in this section is organised around the four original aims but also includes separate sections in respect of governance and technical developments.

Business Case: *To improve the business case developed to support a new programme proposal.*

The Business Case constitutes an important component of the redesigned programme approval and management process, capturing information about the rationale, resources and costs associated with proposal developments. To date, a template to support business planning has been developed in MS Word. A draft version of the template has been uploaded to the Design Studio and can be found at the following link: <http://jiscdesignstudio.pbworks.com/w/page/39170809/The-Business-Case>

The template has been considered by School Managers, a vital group of stakeholders for the project, who indicated that a more formalised business plan would act as a useful planning tool for them.

The Project Manager has also initiated a new round of discussions with the Finance Division (John Newton, Assistant Director of Finance [Costing, Pricing, and Special Projects]) to clarify the University's position in this area.

This has become a more complex area for the project than originally anticipated. The scope and scale of changes in higher education over the last two years and the anticipated far-reaching changes over the next five years are having an impact on every aspect of the University's business. As such, the project is taking a pragmatic approach to what can be achieved during the lifetime of the project and

Institutional Approaches to Curriculum Design Programme

ensuring that the design of the business case component of the new process does not compromise its utility in the future.

Curriculum Design: *To review the processes used to design programmes.*

Support for Curriculum Design has been identified as a priority area in the new 3-year Education Strategy for the institution. The strategy aims to provide an inspiring and enriching educational experience that maximises the potential of students at Cardiff University.

The project plans to work with the Learning and Teaching Support team based in the Academic Policy section to ensure that the work of PALET contributes to the delivery of the strategy objectives. The introduction of an electronic system to manage programme development provides an opportunity to do a range of things in respect of curriculum design:

1. To **'hard-code'** curriculum design into a process, ensuring that certain considerations about the curriculum will be compulsory.
2. Wider but still **'structured'** support for curriculum design will also be built into and around the electronic process in a range of judicious and timely ways. During the Lean workshops, stakeholders identified that they would find a 'knowledgebase' of tools, guidance and case studies of good practice useful, in order to support curriculum design activity. In response to this stakeholder requirement, the process will ensure that each component is supported by a range of guidance, tools (utilising the tools and techniques developed by other projects in the programme where possible) and examples of good practice, hosted on the web and linked to from the SITS process. We are also working to ensure that more unorthodox approaches to supporting curriculum design such as advice from students is also built into the support infrastructure.
3. Growing out of the early discussions about the 'knowledgebase', a third area of exploration has also emerged. The focus here is on whether it is possible to create a system for **'cohort peer support'** amongst academics developing new or revised programmes in any one year. PALET had intended to pilot the use of an online, collaborative environment called Lotus Connections for this kind of activity. The future and sustainability of Lotus Connections is uncertain at the institution and so the technology will now not be piloted by the PALET project. The project is still keen to introduce opportunities for peer discussion and collaboration. Following discussions at a CAMEL meeting in October 2010, the project is exploring the use of [CloudEngine \(The Open University\)](#) for programme teams to capture discussion and share ideas and resources.

In line with the Education Strategy, the project has recognised the importance of the 'Student Voice' in relation to the design of a curriculum. Since the last interim report, the project has been working with Sarah Ingram (Academic Affairs Officer, Students Union) to discuss how best to engage with students about what they understand by curriculum design and how they might engage with this.

As a result of the discussions, the project facilitated a focus group with a group of student representatives from a range of Academic Schools. The focus group discussed the different teaching and learning methods used across the discipline areas represented and explored how students would like to be involved in designing how a course is structured and delivered. Discussion at the focus group highlighted some good examples of Academic Schools that are working in partnership with students during course design/redesign, which will be followed up. Further information about the outcomes of the focus group can be found in a video blog, which can be viewed at the following link: http://blogs.cf.ac.uk/palet/entry/video_blog_series_students_and

Programme Information: *To streamline the information required in a new programme proposal and to enhance the links between this and the programme's operation.*

Institutional Approaches to Curriculum Design Programme

It is in this area that the project's scope was widened and this has been the main focus of activity during this period.

Module Management

Since October 2010, the project has worked to enhance and build upon work previously undertaken by the Student Systems team to support Module Management. Prior to developments made by PALET, SITS online processes were available for schools to create new modules by capturing basic data to enable the set up of the module on SITS. PALET has introduced a number of enhancements to the module management processes, to enable schools to capture a full module description including assessment details, and manage this information on an annual basis. The enhancements were made in consultation with School representatives on the PALET Project Management Team.

The module management processes were designed based upon the [student facing module description template](#) that was developed previously by the project. The processes enable schools to capture descriptions of each module, including details about assessments. Module details stored within the system will be rolled forward on an annual basis to create a new version or 'occurrence' of the module description. This will ensure that a historical record of each module description is stored, which will be used to provide alumni with information about the exact programme of study upon which they were enrolled.

Following the roll forward of the module description data, Academic Schools will be able to use online processes to manage this information, subject to the approval of any changes by the relevant Board of Studies. Schools are able to record the details of the approval process within the system for audit purposes.

The implementation of the development and approach outlined above provides opportunities to improve the management of minor, incremental changes that may (after several years) result in a significantly different programme to that which was originally approved.

Full training on the functionality of the module management processes took place during January 2011, and the task was rolled out on 1 February 2011.

The project has worked with a number of schools to pilot the module management processes – School of Engineering (ENGIN), Cardiff Business School (CARBS), School of Nursing and Midwifery Studies (SONMS) and School of Journalism, Media and Cultural Studies (JOMEC). The project is working with staff in ENGIN to facilitate a data migration exercise from a database internal to the school, to populate the relevant data fields in SITS. Full descriptions have been input for all CARBS and JOMEC modules, and selected SONMS modules. The tasks were available for all schools to use, if in a position to do so. At the time of writing there are over 800 modules with full descriptions in the system.

The module management processes will directly improve the experience of students at Cardiff University who are required to select modules online. Students will be able to access full, online descriptions of their modules via the SITS online module selection task, to help support their decision making.

The PALET Project Team is now working with the pilot schools to explore how the module data will be reused from the single source held in SITS. The team plan to work with CARBS to use the data to produce Postgraduate module handbooks, direct from the single source of module information in SITS.

The improvements identified above will help to ensure that students (applicants, current, alumni) receive consistent, up-to-date and comprehensive information about their modules from data captured and managed in a single source (SITS).

Institutional Approaches to Curriculum Design Programme

Programme Structures

A key aim of the PALET project is to ensure that clear, relevant and appropriate information about programmes and modules is made available to students, staff and applicants from a single source of data. At its January meeting, the Academic Standards and Quality Committee (ASQC) endorsed a number of key programme management principles, which underpin the work of PALET:

- One programme – one set of information;
- One programme – one school;
- The right data – the right purpose;
- Personalised information for students;

In order to fulfil these principles, the committee also endorsed that the programmes managed in the SITS system be structured to deliver the single source of programme information electronically. This will require a set of programme information to be developed and stored against every programme in SITS. Structuring programme information in this way in SITS will improve the experience of applicants, students and graduates of a programme, as detailed below;

- schools are able to manage programmes and modules directly in SITS in a simple and logical way via the online processes and tasks currently being specified by PALET;
- improve the experience of many students by creating programme handbooks for current students and to create extended transcripts for past students;
- simplify the student programme transfer processes;
- simplify data reporting to HESA, the Student Loans Company and UK Border Agency;
- contribute to the delivery of the HEFCE proposed Key Information Set (KIS) for use in the recruitment process for prospective students.

The changes are not insignificant and the project has developed a communications plan for this area of work, to ensure that all stakeholders are appropriately informed. Professor Jonathan Osmond, Pro-Vice Chancellor Education and Students (PALET Project Sponsor) recently sent a memo to all Heads of School, copied to School Managers requesting a nominee from each school to work with the PALET team to implement these changes. The Project Team are now working with schools to implement the changes, tailoring the support according to the impact the change will have.

Programme Approval and Management: *To implement a revised procedure for the approval and management of new programmes.*

In order to ensure that Programme Approval and Management processes are developed holistically, processes have been designed using the concept of 'components'. The process is made up of distinct components of activity, in order that it is flexible enough for users to engage with specific components in order to manage smaller programme changes.

During the project, various methods have been used to visually represent processes and procedures, including IBM WebSphere Business Modeller, Lovely Charts (free diagramming software) and more recently MS Visio. Whilst these tools have been useful to map current processes, they have not been useful in representing the concepts, relationships and interactions core to the new processes being designed. The project has recently used PowerPoint to map out processes in a simple and logical way, which allows all users to engage with, discuss and understand how the processes might work in an electronic system. This has been a useful tool to document user requirements and to facilitate discussion with both a technical and non-technical audience.

Feasibility Study

The first component of the process is a Feasibility Study, designed for academics to capture initial, raw ideas about a proposed development. The Feasibility Study has been developed within SITS Process Manager, the technology that PALET is using to support the Programme Management

Institutional Approaches to Curriculum Design Programme

processes. The technology will ensure that the information captured in the Feasibility Study is automatically communicated to the relevant stakeholders in the institution. Further information about the Feasibility Study can be found at the following page in the Design Studio:

<http://jiscdesignstudio.pbworks.com/w/page/39108065/The-Feasibility-Study>

Programme Development

The project is now focussed on specifying the components required to develop the details of the programme(s) being proposed. This part of the process design is proving to be complex, as the information gathered will serve a variety of purposes, for instance the population of the student programme handbook, to support the operation of the programme within SITS and to provide sufficient information to a validation panel.

To date, the SITS System at Cardiff University has been used mainly as an administrative tool in Registry and academic schools. The project is seeking to ensure that the formal process is designed in a simple, intuitive way in order to support academic staff to engage with elements of curriculum design in an online process.

Governance

The PALET Project Management Team meets on a monthly basis, which provides a good opportunity for the PALET Team to work with School representatives in the development and refinement of module and programme management processes. Discussion at these meetings has largely been related to the developments taking place in SITS. The project is considering broadening membership of this group to include members of the Learning and Teaching Support team, to ensure that discussion is balanced between SITS processes and how the project will enhance the support for Curriculum Design.

A report summarising project progress and the outcomes of the PALET Project Management Team meetings are submitted to the SITS Executive Group on a monthly basis to keep members informed of PALET work involving the SITS system.

The project intends to hold an 'event' for Senior Management at the institution over the summer, to demonstrate how the project has progressed and showcase project outputs to date.

The PALET project reports into the Information Services (INSRV) governance structures on a regular basis. The project falls under the INSRV Student Experience work programme and reports directly to the I.T. Programme Board (ITPB). The technical lead on the PALET project (Simon Bleasdale) reports all technical developments and issues to the ITPB on a monthly basis.

PALET is the first project to use the newly implemented project work flow processes employed by INSRV, which are based around PRINCE 2 methodologies. The new processes required the production of a Project Initiation Document (PID) and a full technical specification (uploaded to the design studio). The proposed architecture of the project is has also been reviewed by the Platform Architecture Review Committee (PARC) in order to ensure that the project deliverables are aligned with the University wide technology roadmap.

As part of the INSRV work flow processes, a Project Definition Review (PDR) meeting was set up prior to the 'build' phase of the project. This was made up of the team leaders responsible for delivering components of PALET and the primary stakeholders from Registry (Project Manager and Officer). The meeting was useful to ensure that all team leaders were committed to delivering the work with their teams and that all stakeholders were happy that INSRV were fulfilling the requirements of the project.

Technical Developments

Processes to enable schools to capture and manage their modules were developed using SITS task manager and rolled out to schools in February this year. As reported above (Module Management progress report), many schools have engaged with the new developments and have used the processes to input full module descriptions. The project has developed reports within SITS e-vision (the web-based front end of the SITS software) to enable students to access this information when engaged in online enrolment and module selection. An e-vision report has also been developed to provide school based staff with details of all data held in SITS against a module occurrence (including archived, historic data).

The project will now work closely with pilot schools to share the module data stored in SITS via the University Student Portal, on school websites and in Learning Central (Blackboard). A servlet has been developed that publishes an online HTML report of the data stored in SITS. The report is useful to demonstrate to stakeholders the value of creating a single source of programme by showing how module data can be reused to create sophisticated, consistent and well formatted online module descriptions.

The full technical specification for the project has now been published on the Design Studio at the following link: <http://jiscdesignstudio.pbworks.com/w/page/39104122/PALET-Technical-Specification>

Section Three: Risks, Issues and Opportunities

Risks

The last interim report detailed the decision to expand the scope of the PALET project to ensure a holistic approach is taken to the delivery of both programme approval and management systems/tools. Whilst the benefit of broadening the project scope in this way is obvious, it is not without risk.

In particular, there is an active risk that the project will deliver a technology-supported system that will help administrators in the development and management of programme information, but does not support academic staff to enhance the curriculum that they are designing. In the first instance, we are exploring whether enhancing 'curriculum design' representation on the project management team - especially in respect of learning and teaching support staff and student officers – might help us manage this risk.

Issues

Governance and Reporting

The project is exploring whether there is room for further simplification, refinement and enhancement of the governance and reporting structure.

Currently there is a core governance structure to guide, oversee and manage the project (including the University's Academic Standards and Quality Committee). There are also relationships with the governance structures for SITS and those internal to INSRV.

It has become clear there is a need to rationalise our engagement with these structures to more effectively deliver every aspect of the project.

Linked to this, there is a need to strengthen the curriculum design 'representation' in core project groupings, particularly in respect of learning and teaching support colleagues.

Institutional Approaches to Curriculum Design Programme

Opportunities

Strategic Alignment

The University has embarked on four projects in the last eighteen months that have created opportunities for PALET in respect of strategic alignment and to demonstrate progress and achieve outcomes:

1. A new institutional Education Strategy is being finalised.
2. Consideration (reporting to the University Academic Standards and Quality Committee in June this year) in the form of a project called 'Proving Excellence' is being given to reforming the Quality System to focus on risk, outcomes and proportionality as guiding principles.
3. A major project is underway to explore the 'Student Voice' and its role in guiding the work of the University.
4. A project built on scenario thinking and planning techniques called 'Cardiff Futures' is also underway to reform aspects of the University's activities and to provide pointers for future strategic development.

Student administration

The broader project scope has provided the opportunity to review and change the way in which programmes are structured in the SITS system. The existing coding structures in SITS have been in existence since the system was first introduced and were appropriate when the majority of changes to programme and student records were carried out manually. However, to enable schools to manage their programmes online, a simpler, more linear structure to programmes is required. PALET has provided an opportunity to simplify the way data is held in SITS, in order that schools can engage with programme development and management process in a more logical, simple system. (See progress report on 'Programme Structure')

Students as stakeholders

Since the last interim report, the project has identified Students as a key stakeholder and as detailed above, has been working with the Academic Affairs Officer (Students Union) to explore how students might engage in curriculum design. As reported earlier in the report, the project team have been working actively with students to explore how students might engage in Curriculum Design activities. Further focus groups with students are scheduled to discuss and define a more standardised approach to student handbooks.

Work in this area has provided an opportunity for the project to engage with other Welsh institutions as part of the work of HEA Wales Future Directions work which is looking to enhance specific areas of teaching and learning in Wales Higher Education. Georgia Slade (PALET Project Officer) is a representative on the 'Students as Partners' working group, which is currently working to map how Welsh institutions currently work in partnership with students and how this might be enhanced.

Section Four: Outputs and Deliverables

Please find below a list of outputs arising from the project since the last interim report and the relevant Design Studio link.

Student Facing Programme and Module Description Templates – now uploaded to Design Studio:
<http://jiscdesignstudio.pbworks.com/w/page/34415300/PALET-Programme-and-Module-Specifications>

Business Case – A draft version of the Business Planning Template that has been developed has been uploaded to the Design Studio.

<http://jiscdesignstudio.pbworks.com/w/page/39170809/The-Business-Case>

Technical Specification – The full technical specification has been uploaded to the Design Studio.
<http://jiscdesignstudio.pbworks.com/w/page/39104122/PALET-Technical-Specification>

Feasibility Study – A mock-up of the Feasibility Study form has been uploaded to the Design Studio in MS Word format. Screen shots of the Feasibility Study in the electronic system will follow.
<http://jiscdesignstudio.pbworks.com/w/page/39108065/The-Feasibility-Study>

Programme Management Principles - A set of core programme management principles were approved by the Academic Standards and Quality Committee (ASQC) earlier this year and are shared here:
<http://jiscdesignstudio.pbworks.com/w/page/36419788/PALET-Programme-Management-Principles>

Section Five: Evaluation

As the project has moved deeper into the development phase and the process of planning the pilot begins, the project team are trying to focus the approach to evaluation and dissemination and finalise an evaluation plan. This is not straightforward and the Project Manager has taken the opportunity to discuss this at length with Stephen Brown, Critical Friend for the project. This area of activity will be the key part of the next CAMEL agenda in Cambridge in July and Stephen Griffiths will lead one of the sessions at this meeting to explore these issues further.

Apart from the evaluation conducted in respect of the main project components and the opportunities this presents for dissemination activities, three wider themes worthy of further exploration and analysis seem to be emerging from the project:

1. **The 'academic' – 'Third Space' – 'administrative' relationship.** Projects of this kind sit at the heart of the debate about the emergence and influence of so-called 'Third Space' professionals. The merging of curriculum design, the focus on the student experience (beyond the purely academic experience), quality assurance and enhancement, and administrative processes raises questions about professional roles and the management of services. Is it possible to develop processes that respect traditional boundaries in the contemporary university and deliver an appropriate experience for students, or should we focus on creating 'merged' services that transcend these boundaries and put students at the heart of their 'own experience' but sow the seeds of conflict between academics, administrators and 'Third Space'.
2. **Quality Assurance and Enhancement.** Is it possible to develop processes that embody and make real an integrated approach to quality assurance and enhancement? There is a strategic focus on integrating these areas of activity but there remains resistance in practice, and in terms of practical implementation. This project is providing opportunities to explore this relationship and integrating them in the context of a process.
3. **Human-Technology interface.** When is it appropriate to use technology to support administrative and academic processes and systems, both directly in terms of replacing the human dimension and indirectly in terms of enhancing it? Are there areas of activity where technology should be disregarded?

Section Six: Outcomes and Lessons Learned

The project has always been divided into four main workpackages, based around the key aims. Organising the project in this way has been useful for project planning and reporting purposes and managing the allocation of resource across each area of work.

Institutional Approaches to Curriculum Design Programme

The project team has learnt that whilst it is useful to break down project activity into logical workpackages and managed by the appropriate governance structures, further effort is required to create and maintain a sense of harmony and balance between the multiple aims.

There is also a need for constant vigilance to ensure that all workpackages remain on track. In this respect, it is also necessary to find an appropriate balance between institutional priorities and wider project, cluster and programme opportunities and demands.

Section Seven: Communication and Dissemination Activities

The project has developed a new approach to blogging, making use of the FLIP camera provided to the PALET team at the beginning of the project. The PALET Video Blog series can be accessed at the following link: <http://jiscdesignstudio.pbworks.com/w/page/35228333/The+PALET+Project+-+Video+Blog+Series>

Using video to blog is proving to be a simple and quick method of communicating project progress and reflections. One observation is that some members of the project team are not comfortable appearing on camera and would prefer to communicate through the more formal project mechanisms.

Since the last report, members of the Project Team have presented at two meetings of the SITS Implementation User Group, which has a constitution of School Manager/Senior Administrators from every School in the institution. Members of the group have been updated on project progress and received demonstrations of the module management processes within SITS and the HTML Servlet Reports to show how the module data can be used.

Section Eight: Collaboration and Support

Following a change to Project Management in 2010, Stephen Griffiths as the new Project Manager and Georgia Slade (Project Officer) visited the JISC Offices in Bristol to discuss the October 2010 interim report and plans for the future work of the project. Stephen and Georgia appreciated the chance to meet with Sarah Knight (JISC Programme Manager) in a face-to-face setting as it provided a good opportunity to talk openly about project progress and plans for the future.

Stephen Griffiths met with the Critical Friend in March 2011 to discuss most aspects of the project but with evaluation and dissemination as the key elements. This meeting was extremely helpful. The Critical Friend has been a tremendous source of support and confidence during the first six months of this new phase of the PALET project.

Section Nine: Financial Statement

Total Grant	389,063	Duration of project	3 years, 8 months
Reporting Period	November 2010 – April 2011		

Budget Headings	Total budget allocated	Expenditure this reporting period	Total expenditure to date
Staff			
Travel & Subsistence			
Equipment			
Dissemination activities			
Evaluation activities			

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
 - Project will send Programme Team revisions to webpage as soon as possible, in line with changes to Project Scope.
- ✓ 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.