



## Project Document Cover Sheet

Project Information			
Project Acronym	PALET		
Project Title	Programme Approval Lean Electronic Toolkit		
Start Date	September 2008	End Date	June 2012
Lead Institution	Cardiff University		
Project Manager & contact details	Andy Lloyd, Cardiff University. Email ( <a href="mailto:LloydA@Cardiff.ac.uk">LloydA@Cardiff.ac.uk</a> ), Tel. 029 2087 6979.		
Partner Institutions	N/A		
Project Web URL	<a href="http://www.palet.cf.ac.uk/">http://www.palet.cf.ac.uk/</a>		
Programme Name (and number)	Institutional Approaches to Curriculum Design (05/08)		
Programme Manager	Sarah Knight		

Document Name			
Document Title	Project Plan		
Author(s) & project role	Andy Lloyd (Project Manager)		
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2	13/03/09	Revised to consider feedback received on the initial draft
3	24/04/09	Further revised to consider the additional feedback received.



## Project Plan

### 1. Overview of Project

Utilising the Lean Thinking methodology for process improvements, the PALET project will develop revised procedures for the approval of new programmes to create a more agile, efficient and flexible approach to the design of new curricula and the subsequent programme approval process. In the context of the University's Modern IT Working Environment (MWE) project, a service-oriented approach will be utilised to develop a toolset to support academic and support staff through each stage of the new programme approval process, and also ensure that the resulting programme and module information is clearly defined and can be seamlessly utilised by other business applications.

The project will build on and extend a recent end-to-end review of the process conducted through the University's Lean University Project, and will redesign this procedure to ensure that new programmes are attractive, innovative, market relevant and of a high academic standard. This will include a focus on the business case developed for new programmes, on the information required within a programme proposal, and on the process of curriculum design. The revisions will be led and guided by input from staff within academic schools, the main users of the process.

The project will draw upon the tools being utilised across the University within version 2.0 of the MWE, specifically those that will support collaborative working and the development and management of online processes. The project will also link with the work being undertaken to improve the University's data quality, to facilitate the most effective use of this data, and to improve the ability to find, access and publish corporate information.

The project has been identified as a high priority for the University, and it is linked with a number of key strategic matters and other ongoing University-wide projects. These include the ongoing implementation of the Student Information Management System (SIMS) across the institution, review of the University's future approach to portfolio management, implementation of the University's learning, teaching and assessment strategies, and a move towards a definitive single data source to cover the lifecycle of a programme from inception through to delivery. While the success of the PALET project is not dependent on the implementation of the related projects and initiatives, a holistic approach to policy and practice will help to **transform** institutional business processes over the short to medium term.

### 2. Aims and Objectives

The key aims and objectives established for the project are below.

- 1) **To improve the business case developed to support a new programme proposal - to ensure that the University offers programmes that are attractive, innovative, market relevant and of a high academic standard.**

The project will seek to ensure that schools are supported effectively in developing a realistic business plan for new programmes that are sustainable. This will be linked with the revisions being made to the school strategic planning process, and the ongoing discussions being held in the University to define the institution's approach to portfolio planning. Success in this domain will be measured through comparison of the number of students recruited onto a programme against the target number specified in the initial proposal and by analysis of the feedback provided by key stakeholders on both the efficiency and effectiveness of the new process.

**2) To review the processes used to design programmes - to help ensure we provide a range of stimulating, and high quality learning opportunities for our students.**

The project will seek to ensure that the ways in which academic schools engage with curriculum design are enhanced, and that new programmes demonstrate a clear alignment between teaching, learning and assessment. In particular, the project will help support schools to develop accessible curricula that utilise technology enhanced learning within sustainable programmes, and ensure that curriculum design supports implementation of the University's strategies for learning, teaching and assessment. Success will be measured through analysis of qualitative feedback from schools and other key stakeholders, and through the evaluation plans already developed for the University's strategies for learning, teaching and assessment.

**3) To streamline the information required in a new programme proposal and to enhance the links between this and a programme's operation - to help make consistent, comprehensive and timely information about programmes to staff, students and applicants.**

The project will seek to ensure that the information produced for a new programme can be repurposed and transferred automatically into SIMS. It will also explore other ways through which the approval documentation can be repurposed and used to support a programme's operation. This will involve links being made with the SIMS project, and with a range of other processes operated by schools and directorates (e.g. the library catalogue, prospectuses, student handbooks etc.). The processes used to automatically repurpose this data will be subject to ongoing evaluation.

**4) To implement a revised procedure for the approval of new programmes - to improve the efficiency and effectiveness of the processes and procedure in this area.**

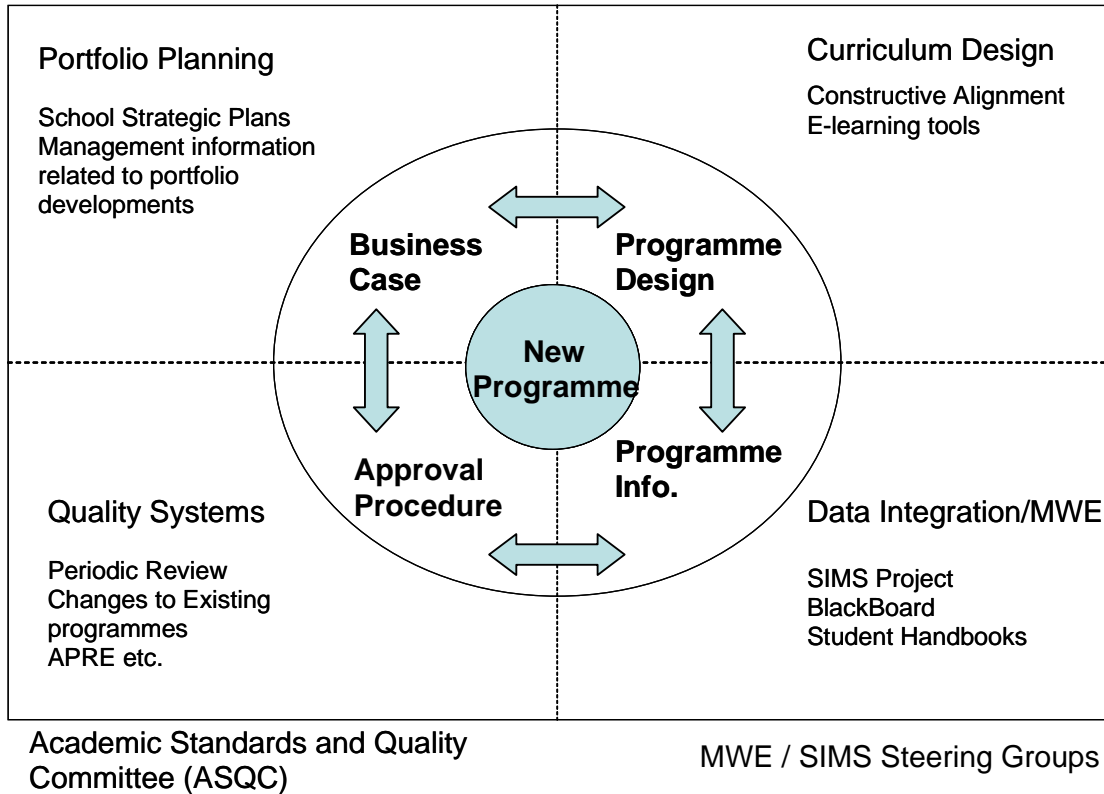
Through the use of lean thinking, the project aims to reduce the length of time that it takes to approve a new programme. Quantitative data will be gathered once the new process is in place and compared against the baseline data gathered at the project's inception. The project also intends to take a 'user-centred' approach to the design of a new programme approval. We will ensure that the user community is involved from the outset of the design process and throughout the life of the project. The success of this objective will be measured when the new process is adopted formally and rolled out across the University.

**5) To ensure that any lessons learned are disseminated effectively.**

This will be done in a range of different ways, as appropriate. More details are in section 18 of the plan.

The above considers mainly those matters which are solely within the project's domain, clear links having been established between the baseline data, the project's objectives, and evaluation strategy. As noted before, whilst achievement of the aims is not dependent on resolution of the wider policy questions, a joined-up approach will increase the impact of the project significantly. The wider relationship between the project and the key institutional policy questions and decision making structures is illustrated in the figure overleaf, the key matters that the project is concerned with being central to this figure. Whilst the project aims to reduce the length of the approval process, it will also ensure that the revised process does not compromise the quality or standards of awards in any way.

Academic Strategy Committee (ASC)      Learning and Teaching Committee (LTC)



### 3. Overall Approach

The project will operate using a sliding planning window to help maintain a flexibility that will allow it to adapt to related developments in the wider arena. The main stages of the project will be concerned with the below stages. Links will be made between the different elements where appropriate, and changes made to the existing procedure, should they be identified as 'quick wins' that do not impact on the project adversely. The need to ensure that the different elements of the project are synchronised with the wider strategic decisions is key.

- a) Planning and Preliminary Work
- b) Process Review
- c) Development and production of the IT-based toolset
- d) Pilot and review of the revised process

A detailed breakdown of the actions that will be taken within each of the above stages in the project is outlined below. Stakeholders will help to develop ideas and will be closely involved throughout all phases of the design, development and decision making processes. This is important to ensure that a broad sense of ownership of the revised process is established amongst the end users and to stimulate buy-in. The different workpackages are not considered as discrete, and overlap both in scope and timing. Their delivery will be co-ordinated by a single project team, in which all of the main stakeholders are involved.

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**a) Planning and Preliminary Work (September 08 – April 09)**

The initial stages of work will be focussed on the production of an agreed project plan and the establishment of the Project Management and staffing structures. A detailed risk register, stakeholder analysis and evaluation plan will be completed by April 2009. The project team will produce a communication strategy and create and maintain a project website and other tools, as appropriate.

**b) Process Review (September 08 – December 09)**

During this stage, the project will review the outcomes from the end-to-end lean review of the current programme approval procedure, and focus on collecting and analysing baseline data and evidence. This will be linked closely with the four main project aims and evaluation strategy. The project will develop mechanisms to consult with and actively involve academic schools and support directorates with the project, and will pilot a collaborative workplace in the School of Nursing and Midwifery Studies (SONMS). The information required to develop and operate a new programme will be reviewed, alongside the processes academic staff use to design new curricula.

**c) Production and testing of the IT-based toolset (May 09 - July 10)**

Initially, this stage will be concerned with producing clear documentation of each phase within the revised process and defining the data to be collected. Following on from this, the project team will gather requirements of how the process will work and identify the required data flow (e.g. from programme approval to a student handbook). The different tools will be developed and tested by the project team in collaboration with a range of stakeholders, before being tested by a range of end users.

**d) Pilot and review of the revised process (September 10 – July 11)**

The revised process will be piloted with at least two academic schools. The project team will review, reflect upon and evaluate the pilot and make revisions to the process, if appropriate. The final revised procedure will be presented to the ASQC committee for final approval, prior to roll-out across the University

In the first instance the project will focus only on entirely new programmes of study. Through the links developed with SIMS and other related projects, the ways in which amendments to existing programmes are managed will also be looked at, to help inform future work.

Cardiff School of Nursing & Midwifery Studies (SONMS) was selected for inclusion in the pilot phase as it is frequently required by the Welsh Assembly Government, NHS Trusts and the Nursing and Midwifery Council to develop innovative programmes in a short period of time to respond to identified national and local educational needs. With its range of professional courses from degree to postgraduate level, the portfolio reflects that of most HEIs. A range of other schools will also be offered the opportunity to participate in piloting the new process, this being dependent on the number and type of new programmes being developed in session 2010/11.

Support and training on the new programme approval procedure and the supporting electronic toolset will be provided to relevant staff on the following basis:

- 1) Senior members of staff responsible for approving and signing-off new programmes will be trained first, along with those responsible for administering the procedure.
- 2) Other members of staff will be provided with training on a 'Just In Time' basis, as teams bring forward new programmes for approval. Training will be compulsory for all staff bringing forward new programmes once the new procedure and toolset are in place.

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The Critical Success Factors for the project include:

- Reduction in the length of time that it takes to approve a new programme;
- Improved satisfaction from stakeholders with the new process;
- Automated links exist between an approval document and SIMS;
- Wide support for the revised procedure;
- The effective dissemination of outcomes; and
- Effective integration between the project and related initiatives.

#### 4. Project Outputs

The main output of the project will be the IT toolset developed to support the operation of the revised procedure. This will be delivered through the University's Modern IT Working Environment (MWE) project, as part of the partnership the University has with IBM. It will be build using an Open Standard based toolkit. The project will disseminate information on how the system works to the community.

Other outputs from the project are listed below:

- **Baseline Report:** The project will produce a report on the baseline evidence gathered on the current Programme Approval Process. This will include the production of case studies/scenarios of current practice, and a future state model that will evolve over the lifetime of the project to reflect the changes and improvements made;
- **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 JISC website will include information about the PALET project, including a copy of the bid accepted for funding. Members of the Project Team will contribute to the *Circlespace* site as appropriate;
- **Training Material:** The project will produce a training manual to disseminate information about the improved business process and the electronic toolset to the Academic Schools that were not involved in the pilot phase. This will help ensure that the process becomes embedded properly within the University;
- **Guidance Material:** The project will produce guidance materials of interest to other institutions that may wish to adopt or adapt the Lean approach to Curriculum Design that Cardiff University takes. The guidance documents 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.
- **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.
- **Project Reports:** Project reporting will take place according to the Design Programme calendar on the *Circlespace* website: <http://www.circlespace.net/blog.aspx?bid=5329&>. The final project report will be submitted in July 2012. Members of the project team will attend programme meetings as appropriate and participate in events in support of the initiative and contributing to programme evaluation activities.

Through the operation of the project a range of knowledge and experience relevant to the programme outputs will be gained. These will be highlighted in and disseminated through the reports produced for JISC, through interaction with the support and synthesis project, and via other appropriate activities. This will include reflections on the lessons learned, on the processes that support effective curriculum design, and on the lessons learned through the adaptation of lean thinking methodology to this process.

## 5. Project Outcomes

A range of outcomes will arise from the project. Many of these will be of interest to the wider community as well as to the host institution. They include enhanced understanding of:

- the applicability and suitability of lean principles to process review;
- the ways in which academic communities approach curricula design and put together programmes;
- the suitability of IT tools to support collaborative approaches to curriculum design;
- the range of strategies that can be used to involve different stakeholders and create a wide sense of ownership for the project outputs; and
- the management of change, particularly that associated with the adoption of new IT tools.

Specifically at Cardiff it will:

- contribute to the ongoing evaluation of the tools being made available in version 2.0 of the MWE;
- help with the provision of clear and accurate information to staff, applicants and students, and support the development of a definitive single data source of programme information; and
- support programme management across the University, and facilitate the development of new programmes that meet the University's strategic needs.

The project will also contribute to a number of the programme outcomes, through the work undertaken across the four key project aims.

- 1) Business planning – By reconsidering the ways in which academic schools develop a business case for a new programme, it will help support programme management across the University, allow schools to respond to **new markets** and **employer needs** in an agile fashion, support amendments to existing programmes, and facilitate the development of new programmes that meet the University's **strategic** needs.
- 2) Curriculum design – By encouraging new ways of thinking about programme design, it will support the development of **curriculum documentation** that will better **support learning**, and ensure academic staff can access appropriate sources of advice and support.
- 3) Data integration – By exploring the links between different systems and processes it will develop a system that will enable the **outputs** from the course approval process to be **re-used** to support the range of **processes** and **systems** that support different stages of the student lifecycle.
- 4) Business process - By streamlining and simplifying the procedure for the approval of new programmes it will support an **agile, efficient** and **flexible** approach to the development of new programmes.

## 6. Stakeholder Analysis

The PALET project is a pan-University initiative that will involve a wide range of stakeholders, including staff in Information Services, Registry and Academic Services, the Planning Division, and from academic schools, particularly the School of Nursing and Midwifery Studies. More details of the different strategies that will be adopted to maintain ongoing and positive two-way communication with the different stakeholders is contained in the Communications Plan.

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<b>Internal Stakeholders</b>	<b>Interest / stake</b>	<b>Importance</b>
Academic Standards and Quality Committee (ASQC)	Policy and process owner who will receive, discuss and be requested to endorse the redesigned procedure for the approval of new programmes.	High
Information Services Directorate (INSRV)  (MWE Team) (Business Information Systems Team) (Libraries) (Learning and Teaching Team)	Responsible for the build, roll-out and support of the MWE, the Directorate will help design and build the IT toolset to support the redesigned process. Directorate with responsibility for the virtual learning environment, library resources, and the support of business information systems.	High
Registry, Governance and Student Support Directorate (REGOS)  (Academic Policy Section) (Student Administration Section)	Co-ordinates and supports the programme approval process, SIMS, and the support of University academic policy. Lead directorate for the project.	Very high
Cardiff School of Nursing and Midwifery Studies (SONMS)	Will help redesign and then pilot the revised process and toolset, and support communication across the academic community.	High
The Strategic Development Directorate (STRAT)  (Planning Division) (Public Relations and Communications Division) (International Division)	Home to the Lean University Project and provider of support to Heads of Schools in strategic and business planning. Responsible for student recruitment matters, including the prospectuses and the provision of strategic advice to schools on the current market position and other recruitment matters.	Medium
Physical and Financial Resources Directorate (PAFRS)  (Estates Division) (Finance Division)	Directorate with responsibility for financial matters, together with the physical learning environment, the management of pool rooms and space management across the University.	Medium
Academic Schools  (Heads of Schools) (Academic Staff) (Administrative Staff)	Main users of the programme approval procedure.	High
Students	Participate in validations and potential main beneficiary of portfolio changes.	Medium

<b>External Stakeholders</b>	<b>Interest / stake</b>	<b>Importance</b>
JISC	Project (and programme) sponsor, interested in ensuring value for money and the wide dissemination of the project and programme outcomes.	High
The other projects under the	Interest in the tools, approaches and resources	High

Curriculum Design/Delivery Programme	developed by the project and in sharing findings, engaging in discussion, and developing a shared understanding of relevant issues.	
Group B Design Cluster projects	Interest in the project and its outcomes, and in collaboration as appropriate.	High
UK HE Community	Likely to be interested in any outcomes from the project that are transferable.	Medium
Professional and Statutory Bodies	Interested in the content of curricula, and in the processes used to support curriculum design in different disciplines.	Medium

## 7. Risk Analysis

The project will adopt a proactive approach to risk management, based on the model set out in the JISC Risk Management infoKit (<http://www.jiscinfonet.ac.uk/InfoKits/risk-management>). This will include:

- i) Development of an initial risk register (Project Manager) using the template provided in the JISC Risk Management infoKit;
- ii) Qualitative and quantitative risk analysis, to allow proper consideration and response to defined risks as deemed appropriate (Project Management Team);
- iii) Ongoing monitoring and updating of the risk register (Project Management Team reporting to the Project Steering Group);
- iv) Discuss risks, problems, and issues, explore solutions, and identify any that should be escalated to the Programme Manager (Project Steering Group).

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk
<b>Staffing</b>				
Failure to recruit the key project staff;	1	4	4	Accept that deliverables may potentially be delayed in the short term, and re-allocate tasks to existing staff.
Loss of project manager or other key members of project staff;	2	5	10	Appoint new Project Manager from within existing Registry team. Ensure knowledge is shared across team.
Staff don't have the right skills mix to deliver the project successfully;	2	4	8	Identify skills deficits and provide relevant training and support. Bring in staff with the right skills.
Insufficient support available to maintain the toolset beyond the project's lifecycle.	2	3	6	Identify the resource requirements and make a case for extra support through the University governance structures.
Insufficient or inadequate training is provided to end-users;	2	4	8	Learn lessons and apply more effort as required.

<b>Organisational</b>				
Lack of engagement from the key stakeholders, or from the wider academic community;	4	3	12	Learn lessons of failure and document reasons for lack of engagement. Use University governance structures to facilitate increased buy-in.
Insufficient co-operation and/or communication between the stakeholders;	3	4	12	Apply more effort to internal marketing. Utilise University governance structures and senior management engagement to enhance internal collaboration.
Unrealistic expectations of the project's outcomes.	2	2	4	Project Management team will manage expectations consciously throughout project lifecycle and issue clear guidance on the deliverables to different stakeholders.
Insufficient links between this and other relevant projects;	3	4	12	Use University governance structures to facilitate increased co-operation.
Initiative overload may lead to poor 'buy-in' to the project.	3	3	9	Ensure the potential benefits of the project are articulated clearly to secure effective buy-in.
Failure to agree on improved business process;	3	3	9	Resolve through input from University Governance structures.
<b>Technical</b>				
Failure to produce deliverables due to unforeseen complexity;	2	5	10	Project Management group to maintain control of milestones and deliverables. Reduce potential deliverables. Use Project Steering Group to address.
Process proves too complex to implement with chosen methods	2	5	10	The project would be a failure if a technical solution were not produced but regular project progress meetings and the deadlines set for publication of progressive work, along with the technical expertise and experience at CU, should ensure that the deadline is adhered to and a solution produced.  Choose a different method and delay implementation of the deliverables across the University.
That the software doesn't work in the intended way	1	5	5	This can be managed with testing and project reviews to assess if the

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				key functions of the project are being delivered by the software.
Different elements of the toolset do not integrate properly;	2	4	8	Integration testing throughout the project will highlight any issues. Consultant advice will be available to problems.
Toolset cannot be linked with other systems (e.g. SIMS);	1	5	5	The University has a wealth of experience in this area. There are a number of alternative ways to get the systems to link together which can be explored.
<b>External</b>				
Changes in the external environment (e.g. QAA) that impact negatively on the project.	1	3	3	Maintain a watching brief and track any potential developments in the external environment. Review and adapt the project plan if required by changes in the external context.
Changes in the economic environment that impact negatively on student recruitment and the University's portfolio.	4	2	8	Maintain a watching brief and track any potential developments in the external environment. Review and adapt the project plan if required by changes in the external context.

## 8. Standards

Any software development undertaken as part of this project will be done using an Open Standard based toolkit. We are happy to make the code developed through the project available to the community, and to sharing the lessons learned through the adaptation of lean thinking methodology to this process. The open standards on which the toolkit will be based are indicated below.

Name of standard or specification	Version	Notes
Business Process – – BPEL (Business Process Execution Language) - OASIS	1.1	
Web Services – WSDL (Web Service Definition Language) - W3C – SOAP (Simple Open Access Protocol) - W3C	1.1 1.2	
User Interfaces – XFDL (Extensible Forms Definition Language) - W3C XFORMS - W3C	7.5 1.0 2.0	

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*OASIS - (Organisation for the Advancement of Structured Information Standards)*  
*W3C - (World Wide Web Consortium)*

## **9. Technical Development**

A full options analysis will be undertaken to decide the best technologies to deliver the goals of the project. This section will be updated on an ongoing basis.

## **10. Intellectual Property Rights**

The IPR of technology-related outputs from the project will be determined in accordance with University policy and with JISC guidelines.

Outcomes specific to Cardiff University will remain entirely the preserve of Cardiff University. All other materials, such as the code related to the software developed as part of this project, presentations, papers, blogs and other dissemination methods delivered through the project website are granted a non-exclusive licence to JISC as appropriate to a project of this nature.

## ***Project Resources***

### **11. Project Partners**

The project is based entirely within Cardiff University.

### **12. Project Management**

The project will be managed by a Project Management Team, operating under a Project Steering Group, working under the auspices of the University's Academic Standards and Quality Committee. It will involve, as appropriate, representatives from all of the different stakeholders, and will utilise the principles set out in the University's Project Management Framework as appropriate. The figure overleaf sets out key elements of the formal project management arrangements.

A core but flexible team will support delivery of the project aims, this being made of staff from Registry and from Information Services, working in partnership. This includes the Project Manager (Andy Lloyd) and Registry Project Officer (Georgia Slade), as well as members of the Business Information Services team in Information Services, including Simon Bleasdale, Karl Herbert and the dedicated technical support post. The core membership of the team will be supported by a range of staff at different points in the project, as appropriate. This will include members of the University Lean Team and staff from the School of Nursing and Midwifery Studies, as well as other specialist staff from Registry and Information Services.

#### **Project Steering Group**

The Project Steering Group will normally meet 3 or 4 times a year, meetings being scheduled to coincide with the reporting cycle established to support the project and its evaluation. It will receive reports from the Project Manager, and as appropriate, make recommendations on changes to the original project plan. The Project Steering Group will report to ASQC, and to ensure effective cross-reporting, will make reports available as appropriate to relevant parts of the MWE governance structures. A shared workplace will be set up to ensure that all of the relevant documentation is made available to members of the Project Management Team, Project Steering Group, ASQC members, and other stakeholders as appropriate.

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The purpose and remit of the Project Steering Group is to:

- Steer and guide the project;
- Review progress and outputs;
- Review outcomes and their impact on the community;
- Advise the project team;
- Represent the interests of the project partners;
- Agree important decisions and changes to plan;
- Discuss risks, problems, and issues, explore solutions, and identify any that should be escalated to the programme manager;
- Ensure delivery on time and within budget;
- Formative evaluation – reflect on how things are going and what could be improved.

Membership:

Prof. Jonathan Osmond (Chair), Pro Vice-Chancellor (Education and Students) and Project Sponsor  
Andy Lloyd (Project Manager), Registry  
Prof. David Miers, Member of ASQC and Cardiff Law School  
Jill Bedford, (Director of Registry)  
Dr Robert Dewdney, (Director of Academic Support), Welsh School of Pharmacy  
Karl Jones, (Head of Business Information Support), Information Services  
Simon Vaughan, (Assistant Director), Information Services  
Dr Dianne Watkins, (Director of External Relations, Learning and Teaching), SONMS  
Christine Stewart, (Lean University Project Manager), Strategic Development Directorate  
Dr Chris Turner, (Director of Registry, Governance and Student Support)

**Project Management Team**

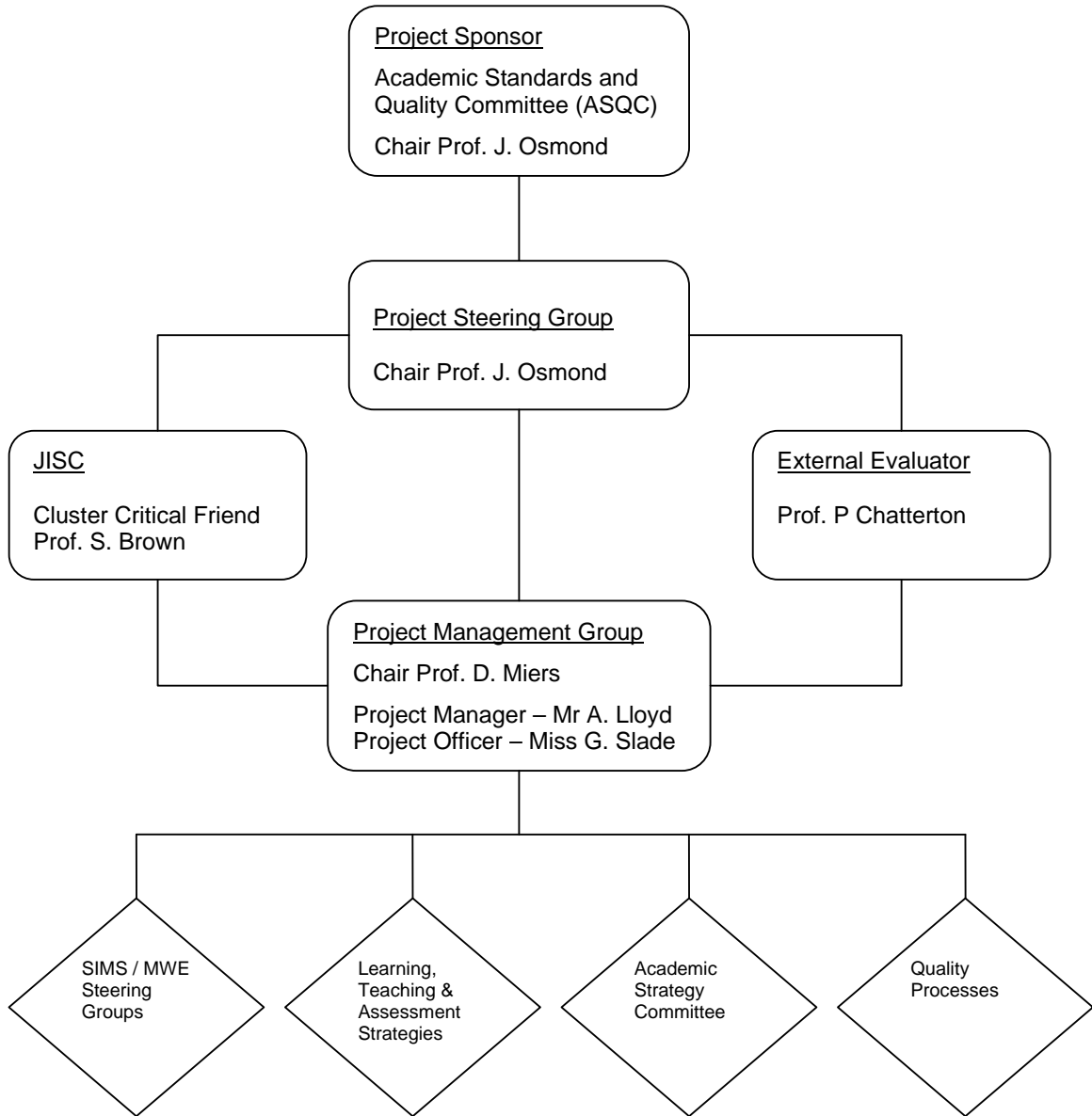
The Project Management Team (PMT) will meet at least six times a year. Through the Project Manager it will report to the Steering Group, who will receive the agreed minutes from PMT Team meetings. An Action Sheet from each meeting will be produced, progress against the actions this contains being monitored through subsequent PMT meetings. The minutes and action sheet will be distributed and disseminated through the project shared workplace.

The purpose and remit of the Project Management Team is to:

- Manage implementation of the project;
- Ensure effective co-ordination in implementation of the project;
- Monitor the progress being made against the agreed project plan;
- Monitor the risk register;
- Support the production of reports to the Steering Group and JISC;
- Manage communication and dissemination of information both within and externally to the Project;
- Monitor expenditure against the agreed project budget;

Membership:

Prof. David Miers (Chair), Member of ASQC and Cardiff Law School  
Andy Lloyd (Project Manager), Registry  
Georgia Slade (Secretary and F-T Project Officer), Registry  
Jill Bedford, (Director of Registry),  
Simon Bleasdale, (Senior Integration Officer), Information Services  
Stephen Griffiths, (Assistant Registrar – Learning and Teaching)  
Karl Herbert, (Senior Services Developer), Information Services  
Caroline James, (Programme Support and Quality Manager), SONMS  
Janet Peters, (University Librarian), Information Services  
Christine Stewart, (Lean University Project Manager), Strategic Development Directorate  
Richard Trueman, (Assistant Registrar – Quality Assurance), Registry  
Gail Williams, (Director of Quality), SONMS.



Related projects / linked initiatives

### 13. Programme Support

The project has identified a wish to receive further support and training on Project Management, and will work with the Support and Synthesis Project Co-ordinator to arrange this. Further support requirements have not yet been identified, but will be discussed, as appropriate, with members of the Support and Synthesis Project.

### 14. Budget

See Appendix A.

## ***Detailed Project Planning***

### **15. Workpackages**

See Appendix B

### **16. Evaluation Plan**

The project has appointed an external evaluator (Professor Peter Chatterton) to ensure that an independent, respected and professional judgement can be made on the success of the project. The project team will work with the External Evaluator to develop an evaluation plan for the life of the project and beyond, based on the RUFDATA model. The project will seek to ensure that evaluation is an ongoing and holistic process for all involved in the project.

- **Reasons and purposes**  
The project has adopted an ongoing approach to evaluation, using a reflective approach that is designed to secure continuous improvement. The process will have a strong emphasis on stakeholder engagement and effective communications, which will focus on evaluating the project against its objectives, its operations and its impact on the institution, sector and stakeholders.
- **Uses**  
The evaluation data that is collected will be used in a number of different ways. It will support the reflective approach adopted by the project, enable lessons to be learned, help identify practice worthy of further dissemination, contribute to the evaluation of the programme, and allow judgements to be made on the success of the project.
- **Focus**  
Evaluation will be focused around achievement of the key project aims, successful stakeholder engagement, and effective communications. It will be linked closely with the review of the programme approval procedure and with the baseline data collected to support this. This will allow measures to be defined against which the success of the project will be judged.
- **Data and evidence**  
A range of data and evidence will be gathered. This will include quantitative and measurable data where appropriate, as well as qualitative evidence from key stakeholders. Qualitative methods that will be used include focus groups, interviews and case studies.
- **Audience**  
The different audiences for the evaluation include the project team, its management groups and the University governance structures, as well as other projects funded across the programme, the JISC, and other institutions across the HE sector.
- **Timing**  
Evaluation will be a continuous process, with the data collected being used to support the reflective and critical approach adopted. A longitudinal study will be instigated to focus on the long-term impact of the new procedure.
- **Agency**  
The evaluation will be conducted by the project team and by the External Evaluator, working in partnership as appropriate.

More detailed information can be found in the Project Evaluation Strategy.

## 17. Quality Plan

The Project Steering Group has prime responsibility for quality assurance, and through reports from the Project Management Team and Project Manager, will manage the monitoring and review of quality. This will include:

- one to one interviews with stakeholders;
- stakeholder focus groups;
- reflection on the feedback gathered from the stakeholders involved in the project;
- a review and evaluation of the toolset developed;
- ongoing liaison with the Support and Synthesis project;

The Project Steering Group will report to the University's Academic Standards and Quality Committee, the body with formal responsibility for the management of quality and standards across the University and the 'owners' of the Programme Approval Procedure. Monitoring of the quality of the IT tools developed will be managed by staff in the Information Services Directorate, utilising the governance structures established for the MWE project as appropriate.

Further details will be added to the quality plan as the project develops and evolves.

## 18. Dissemination Plan

The project will adopt an active approach to dissemination, partly in recognition of the need to facilitate the active engagement of different stakeholder groups. Activities will be undertaken to raise awareness of the project, to improve understanding (both of the project's outcomes and of the lessons learned), and to ensure appropriate action is undertaken to help secure effective implementation of the revised procedure. A selection of the activities that will be undertaken is outlined in the table below. This will be reviewed and updated regularly.

Timing	Dissemination Activity	Audience	Purpose	Key Message
Ongoing	Project website	Internal and External stakeholders.	To raise awareness of the project, and keep interested stakeholders aware of progress and future plans.	This is a project and website that is worth following.
Ongoing	Internal seminars and workshops	A range of internal stakeholders including Heads of Academic Schools, School Managers, and Members of the Academic Standards and Quality Committee.	To provide a forum for consultation, and to raise awareness of the project, and keep interested stakeholders aware of progress and future plans.	This project will help you. Can you help it?
Ongoing	Publish briefing papers and 6-monthly reports	Internal and External stakeholders.	To inform stakeholders of progress and to disseminate the outcomes from different stages within the project.	This is what the project has done.

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Ongoing	Programme meetings	Other funded projects within the programme and members of the JISC and support and synthesis teams.	To network and share ideas, outputs and issues with other projects.	Let's work together.
Towards the end of the project.	Workshops, publications and other activities as appropriate;	All stakeholders.	To disseminate effectively the outcomes and lessons learned from the project.	Progress made and lessons learned.
Ongoing	JISC Learning and Teaching Experts Group	HE Community	To raise awareness of the project and keep the HE Community aware of project progress. To network and share ideas.	
Annually	JISC Online Conference	HE Community	To showcase the work of the programme	This is what the project has done.
Ongoing	Contributing to CIRCLE	Curriculum Design / Delivery Community	To keep the community up to date with project progress.	
Ongoing	Twitter	Design Cluster Group B	To provide a forum for sharing ideas, current thinking, project developments.	Let's keep in touch.
Annually	ALT-C 2009	HE Community	To disseminate effectively the outcomes and lessons learned from the project.	Progress made and lessons learned.
Ongoing	Project Blog	All Stakeholders and those with an interest in the project/programme	To update the community with project progress and to provide a forum for stakeholders to contribute their views.	Progress and stakeholder feedback
Ongoing (once rolled out)	Lotus Connections	Internal Stakeholders	To keep internal stakeholders up to date with project progress and to provide a forum for internal stakeholders to engage with the project and contribute their views,	Progress and stakeholder feedback

## 19. Exit and Sustainability Plans

The project aims to ensure that the outcomes are embedded within the institution and that any transferable outcomes are disseminated effectively to help promote uptake across the wider community. In the first instance the new process will be presented to ASQC for formal adoption. Work will then continue with schools to ensure it is taken-up and used appropriately. By engaging with users and working with relevant elements of the University's governance structures it is expected

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that embedding the new procedure will be a manageable task. Some further examples are given below:

<b>Project Outputs</b>	<b>Action for Take-up &amp; Embedding</b>	<b>Action for Exit</b>
IT based toolset	Any software development undertaken as part of this project will be done using an Open Standard based toolkit, which will be made available to the community.	Successful dissemination to the wider community.
Lessons learned through the adaptation of lean thinking methodology.	Reports and scenarios outlining the lessons learned will be developed and made available to relevant external stakeholders.	Successful dissemination to the wider community.

<b>Project Outputs</b>	<b>Why Sustainable</b>	<b>Scenarios for Taking Forward</b>	<b>Issues to Address</b>
Implementation of the revised programme approval procedure and IT-based toolset.	Resource will be available to support both the revised procedure and the IT infrastructure.	Project outcomes to help inform the further development and implementation of the MWE.	Ongoing resource requirements need to be identified and met.

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## JISC Project Plan Budget Template

**Before completing this template please note:**

- *Fill in the information for the header, e.g. project acronym, version, and date.*
- *Text in italics is explanatory and should be deleted in completed documents.*

Directly Incurred	Year <08-09>	Year <09-10>	Year <10-11>	Year <11-12>	TOTAL £
<b>Staff</b>					
Project Leader (Grade 8) 0.3 FTE in yr 1, 0.2 FTE in yrs 2,3,4					
Registry Post (Grade 6) 1 FTE					
Technical Post (Grade 6) 1 FTE					
<b>Total Directly Incurred Staff (A)</b>					
<b>Non-Staff</b>					
Travel and expenses					
Hardware/software					
Dissemination					
Evaluation					
Other - contingency					
<b>Total Directly Incurred Non-Staff (B)</b>					
<b>Directly Incurred Total (A+B=C) (C)</b>					
<b>Directly Allocated</b>					
Staff					
Estates					

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Research infrastructure Technicians					
Hardware Software					
<b>Directly Allocated Total (D)</b>					
<b>Indirect Costs (E)</b>					
<b>Total Project Cost (C+D+E)</b>					
<b>Amount Requested from JISC</b>					
<b>Institutional Contributions</b>					
<b>Percentage Contributions over the life of the project</b>		<b>JISC 45%</b>	<b>Partners 55 %</b>		<b>Total 100%</b>

**Nature of Institutional Contributions**

<b>Directly Incurred Staff</b>					
Post, Grade & % FTE					
<b>Directly Incurred Non Staff</b>					
Hardware/Software etc.					
<b>Directly Allocated</b>					
Staff, Estates etc.					
<b>Indirect Costs</b>					
Indirect Costs					
<b>Total Institutional Contributions</b>					

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**JISC WORK PACKAGE**

Further details of the individual workpackages will be added to the plan on an ongoing basis.

WORKPACKAGES	Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
		09/ 08	10/ 08	11/ 08	12/ 08	01/ 09	02/ 09	03/ 09	04/ 04	05/ 09	06/ 09	07/ 09	08/ 09	09/ 09	10/ 09	11/ 09	12/ 09	01/ 10	02/ 10	03/ 10	04/ 10	05/ 10	06/ 10	07/ 10
1: Planning and Preliminary Work																								
2: Review of current processes and practice																								
3: Production of the IT based toolset																								
4: Pilot and review of the revised process																								
5: Evaluation of the project and new processes																								
6: Embedding the innovations and planning for sustainability																								
7: Dissemination and Community Engagement																								

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<b>WORKPACKAGES</b>	<b>Month</b>	24 08/ 10	25 09/ 10	26 10/ 10	27 11/ 10	28 12/ 10	29 01/ 11	30 02/ 11	31 03/ 11	32 04/ 11	33 05/ 11	34 06/ 11	35 07/ 11	36 08/ 11	37 09/ 11	38 10/ 11	39 11/ 11	40 12/ 11	41 01/ 12	42 02/ 12	43 03/ 12	44 04/ 12	45 05/ 12	
1: Planning and Preliminary Work																								
2: Review of current processes and practice																								
3: Production of the IT based toolset																								
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5: Evaluation of the project and new processes																								
6: Embedding the innovations and planning for sustainability																								
7: Dissemination and Community Engagement																								

Project start date: September 2008  
 Project completion date: June 2012  
 Duration: 45 months

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				Milestone	Responsibility
<b>WORKPACKAGE 1: Planning and Preliminary Work</b>					
<b>Objective: Ensure effective and efficient management of the project</b>					
1. Production of an agreed project plan;	09/08	04/09			
2. Establishment of the Project Management structures	09/08	01/09	<b>Complete</b>		AL
3. Production of an agreed risk register, stakeholder analysis, and evaluation plan;	12/08	04/09			
4. Development of a communication strategy and establishment of the project website and other tools as appropriate;	09/08	01/09	Project website available		AL
5. Appointment of dedicated project staff.	09/08	11/08	Project has dedicated staffing		AL
<b>WORKPACKAGE 2: Review of current processes and practice</b>					
<b>Objective: Gain full understanding of existing practice and processes</b>					
6. Conduct a scoping exercise to determine process(s) to be reviewed. Review information held in regard to current process(s). Conduct gap analysis. Create action plan to gather missing information.	04/09	04/09	Workshop being arranged		GS/CS
7. Conduct a current state workshop with small team to provide a map for comment;	04/09	05/09			RT/CS/GS

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8. Run appropriate sessions and data gathering activity to complete the current state picture and develop ideas for future state	04/09	07/09			RT/CS/GS
9. Simulation model to be developed of current state	04/09	07/09			SB/CS
10. Using information from these sessions develop a future state option(s)	07/09	08/09			RT/CS/GS
11. Simulation model to be developed of future state	07/09	08/09			SB/CS
12. Future state option(s) to be put out for comment	08/09	09/09			RT/CS/GS
13. Confirm future state option	09/09	09/09			RT/CS/GS
14. Action Plan to be developed for short, medium and long term	09/09	09/09			RT/CS/GS
15. Future state and action plan endorsed by ASQC	10/09	10/09			RT/CS/GS
16. Implementation of non IT activities	09/09	09/10			AL/GS
17. Confirm future state option	09/09	09/09			RT/CS/GS
18. Communication on session involvement, session output and expectation setting with all key stakeholders	04/09	09/09			AL/GS
<b>WORKPACKAGE 3: Production of the IT-based toolset</b>					
<u>Objective:</u> Creation of the improved business process underway					
19. Clear documentation of each phase within the revised process;	06/09	10/09			AL
20. Define the data to be collected	10/09	12/09			SB / AL

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21. Gather requirements of how the process will work;	12/09	04/10			SB / AL
22. Identification of the required data flows e.g. from programme approval to a student handbook;	12/09	04/10			SB / AL
23. Development and testing of the different tools (including those concerned with data integration);	02/10	07/10			SB / AL
24. User acceptance testing	04/10	07/10	With SONMS and other schools		
<b>WORKPACKAGE 4: Pilot and review of the revised process</b>					
<u>Objective:</u> To ensure the project, procedures and process are developed appropriately.					
25. Piloting of the new process with a new programme being developed in the School of Nursing and Midwifery Studies (and with another academic school);	09/11	06/12			
26. Review, reflection on and evaluation of the pilot	09/11	08/12			
27. Revision, as appropriate, and final approval of the revised procedure by ASQC	09/11	07/12	Through ASQC		
<b>WORKPACKAGE 5: Evaluation of the project and the new processes</b>					
<u>Objective:</u> To judge the success of the project					
28. Evaluation of the project's operation	Ongoing				
29. Evaluation of the improved business process	Ongoing				
30. Evaluation of the electronic toolset	Ongoing				

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31. A longitudinal study that will focus of the impact of the new procedure	Ongoing		Will be undertaken at the conclusion of the project.		
<b>WORKPACKAGE 6: Embedding the innovations and planning for sustainability</b>					
<u>Objective:</u> To ensure the outcomes of the project are sustained and add value					
32. Identify ongoing resource requirements and ensure that they will be met;	09/11	onwards			
33. Help inform the further development and implementation of the MWE;	09/10	onwards			
34. Ensure new process is embedded and supported.	09/11	onwards			
<b>WORKPACKAGE 7: Dissemination and Community Engagement</b>					
<u>Objective:</u> To ensure the project is of value to the wider community					
Set up and maintain project website and blog	Ongoing				
Host a range of internal seminars and workshops	Ongoing				
Publish briefing papers and 6-monthly reports	Ongoing				
Attend and engage with programme meetings	Ongoing				
Develop and hold workshops, publications and other activities as appropriate;	Ongoing				

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Members of Project Team:

Project Manager  
Project Officer (Registry)  
The current procedure (Registry)  
The IT toolset (Information Services)  
The links in Registry  
The School of Nursing and Midwifery Studies  
The Lean University Project

Andy Lloyd  
Georgia Slade  
Dr Sarah Carpenter, Stephen Griffiths, David Lloyd, Richard Trueman  
Simon Bleasdale, Karl Herbert Karl Jones, Simon Vaughan  
Jill Bedford, Peter Boyce, Janet Cormack, Rhodri Evans  
Caroline James, Dr Dianne Watkins, Gail Williams  
Sarah Lethbridge, Christine Stewart